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VoipNow Automation 2.5.3

User's Guide

User's Guide

Manual Version 87498.2 at 2012/02/17 12:06:09

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Who Should Read This Guide

This guide must be read by the Automation administrator.

Chapter 1
Navigation

VoipNow Automation is a business and operations automation solution built for service providers. The product's clear and intuitive web based interface is meant to ease the users' experience, reducing the time required to navigate between the wide range of available options.

The Navigation Panel

VoipNow Automation groups all the important features into several categories that can be accessed at any time from the navigation panel, available in the left side of the screen. The following options can be accessed from the Automation section:

- **Customer accounts** - Clicking this link will open the Customer Accounts Management page that displays a list with all the customers currently set up in the system, while also providing the tools required to manage them and to add new ones.

- ⬢ **Store items** - Clicking this link will open the Items Management page that displays a list with all the items currently set up in the system, while also providing the tools required to manage them, to group them into categories and to add new ones.

- 💰 **Orders** - Clicking this link will open the Orders Management page that displays a list with all the placed orders, while also providing the tools required to manage them and to manually add new ones.

- ▦ **Order deployment** - Clicking this link will open the Invoices Management page that displays a list with all the deployed items, while also providing the tools required to manage them and to define new provisioning servers.

- ▣ **Invoices** - Clicking this link will open the Orders Deployment Management page that displays a list with all the issued invoices, while also providing the tools required to manage them.

- ▪ **Setup** - The system templates, the license, the platform plug-ins and bricks, the payment preferences or the system behavior are some of the options that can be configured from the Preferences Management page.

The Top Frame Controls

When navigating through the web interface, the top frame controls are always available and can be used to log out and to change your interface preferences.

The top frame controls

The three controls are:

- **Logged in as: {your_contact_name}** - Click this link to edit your contact details or if you want to change your password.

- 📝 **My interface** - If you want to change your interface preferences, click this link and use the controls available in the My Interface Settings page.

- 👤 **Logout** - Click this link to log out from your VoipNow Automation account. The current session will be closed and you will be required to provide your username and password to log in again.

The Main Frame Controls

On the top right corner of each page displayed in the main frame you can find another set of controls, used primarily for navigation and for opening the help window.
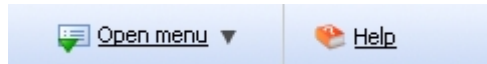
Navigation controls

The default options are:

- 📋 Open menu - Clicking this link will oped a box listing all the options available in the left navigation panel that can be used for quick switching between pages.

- 📕 Help - Anytime, anywhere, when there is something you need more information about, click this link and read the help file.

> **Note**
>
> Your browser must allow pop-up windows in order for the help file to be displayed on screen.

Going down in the application structure, you will be able to move up one level and return to the previous page by using the 🔼 Up level icon.

In some pages that provide real time statistics, you can update the displayed information by clicking the 🔄 Refresh link.

If you are impersonated as one of your child accounts and you want to return to your default account, then click the appropriate 👤 Return to my account link.

Using the Search Functions

All the tables and lists available in VoipNow Automation allow you to search for the desired items. The search functions can be simple or advanced. This section is intended to describe the basic search controls and to provide you an overview of how you can customize the tables layout.

> **Note**
>
> If you want to hide/reveal the search options, then click the ⚑ Toggle search link.

These simple controls can be used for searching a specific word:

- Search – Use the text box to specify the words you are looking for. Click the 🔍 Search link to display only the records that match your search criteria. The table will be updated accordingly.

- Show all – Click the 📄 Show all link to display the entire list.

The search criteria is retained until a new search is performed and it is not lost when navigating to other pages.

The Table Controls

Each table in VoipNow Automation provides several configuration tools designed to offer you a better overview of the available records. Depending on your preferences, you can:

1. Customize the total number of records displayed in each page by clicking the 10, 25 and 100 links available on the right side of the table. The total number of records as well as other details (e.g.: call cost) are shown on the left side.

   In the tables with more than one page of records, you can navigate between pages using the following controls:

   Pages: First << 1 2 3 4 5 >> Last

   > **Note**
   >
   > Have in mind though that a larger number of records per page may cause your system to work slower.

2. Customize the table layout by choosing the columns to be displayed. To do so, click the ⊞ Show columns icon and select (or deselect) the desired columns. This is especially useful for the tables with many columns where you have to scroll in order to see all the information.

3. Sort the table by a certain criterion. To do so, simply click a table header and the entire list will be sorted accordingly. The table header will be highlighted and an arrow will indicate how the resellers list was sorted: ascendingly

or descendingly. The sort direction can be changed by another click on the corresponding header.

How to Remove Table Records

VoipNow Automation offers you a straightforward method for removing the unnecessary records from a table. This method implies the following steps:

1. Choose the records you want to delete by selecting their corresponding check boxes available at the end of the table.
2. Click the ✖ Remove selected link. A confirmation pop-up window will be displayed.

> **Note**
>
> In some situations, another page will be opened and you will be required to review and confirm the removal.

3. Click Ok if you want to remove the record(s). If you do not want to proceed, click Cancel.

Chapter 2
Customer Accounts Management

> **Note**
>
> Access to the 👤 Customer accounts area is permitted:
>
> - To the **Administrator** user.
> - If the number of customer accounts is smaller than the maximum number of customers allowed by the current license.

In Automation, the customers are buyers who have purchased items from the vendor. These customer accounts are not related to the VoipNow Professional account owners. When a customer places an order on the online store, his personal information is added to the Automation database. This information may be used for future purchases made on his behalf. Customer accounts can also be manually added to the Automation database using the interface features.

View the Customer Accounts List

In order to view the list of all the customer accounts registered in the system, click the ⚉ Customer accounts link available in the left navigation panel. This opens the Customer Accounts Management page.

Multiple operations can be performed on customer accounts:

- Add a new customer account.

- Search the accounts list using specific criteria.

- Activate/suspend customer accounts.

- Add/edit the customer's billing information.

- View the customer's orders and invoices.

- View the customer's services.

VoipNow Automation provides the following information about each customer account:

- S - This icon displays the customer's status:

  ◦ ⚉ Active

  ◦ ⚉ Suspended

  Click this icon to change the customer's status. A pop-up panel is displayed, allowing you to choose the desired action, depending on the customer's current status:

  ◦ Active

    ▪ `Suspend customer account` - Click to suspend the customer account. Suspended customer accounts are not allowed to place new orders. This operation will have the following impact on the customer's services:

      - Any services scheduled for deployment will be removed from the deployment queue and will remain in the Pending status.

      - The service(s) scheduled for termination or suspension maintain the same status, the suspension being processed by the activate/suspend scheduled task and the termination by the recurring invoice generation scheduled task.

> 📝 **Note**
>
> The Automatic recurrent invoices generation scheduled task generates the recurrent invoices for the suspended customer accounts as well. These service owners are automatically charged the flat fee for the next period.

- `Suspend customer account and its deployed services` - Click to suspend the customer account and also its deployed services. Suspended customer accounts' owners are not allowed to place new orders. This operation will have the following impact on the customer account's services:

  - Any service scheduled for deployment that has not been already deployed is canceled.

  - Any service already deployed and scheduled for activation due to a previous suspension is removed from the processing queue.

  - Any active service already deployed will be scheduled for suspension.

  - The services that are presently suspended remain unchanged.

  - The services enqueued for termination remain unchanged.

> 📝 **Note**
>
> The Automatic recurrent invoices generation scheduled task generates the recurrent invoices for the suspended customer accounts as well. These service owners are automatically charged the flat fee for the next period.

- Suspended

  - `Activate customer account` - Click to activate the customer account. The customer will be able to place orders again. This operation will have no impact on the customer account's services:

  - `Activate customer account and unsuspend deployed services` - Click to activate the customer account. The customer will be able to place orders again. This operation will have the following impact on the customer's services:

    - Any deployed services that was suspended due to customer account suspension will be activated.

    - Any service that was canceled with deployment in progress due to customer account suspension will be deployed.

- Any service enqueued to suspension due to the customer account's suspension that has not been processed will maintain the previous status.

- Name - The customer account's owner name.

  Click the chosen customer name if you want to view/edit the information. For more details, check the Edit a Customer Account section.

- Email - The customer account's owner contact email address.

  Click the email address to send an email message to the selected customer.

-
  Country - The country specified for the customer account.

-
  Phone number - The contact telephone number specified for the customer account, formated in an easy to display format, as in VoipNow Professional . By default, this column is hidden. If you want this column to be displayed, click the ⊞ Show columns link and select the Phone number check box from the list shown in the Choose columns pop-up panel.

-
  Billing details - This column displays the number of billing information addresses filled in for each customer account that is available in the system. A customer account may have more than one billing address to be used for paying his orders.

  Click the New link if you want to add a new billing address. For more details about adding new billing information, check the Add a New Customer Account section.

-
  Orders - This column displays the total number of orders placed by a customer.

  Click the number link to go to the Orders Management page corresponding to the chosen customer account. For more details, check the Orders chapter.

-
  Invoices - This column displays the total number of invoices as well as the number of due/overdue invoices. The overdue invoices are displayed in red, showing that the payment date has passed.

Click either the total number of invoices, either the Due or Overdue links to go to the chosen customer's Invoices Management page. For more details, check the Invoices chapter.

*

    Deployments - This column displays the total number of deployed and active services. After the client has purchased a certain item from the online store, in order to be effective, the item must be remotely deployed on a provisioning server. After the deployment process is successfully completed, the item becomes a functional service.

Click the total number of deployments to go to the chosen customer's 'Services Owned by Customer Account' page. If you want to check only the active services, click the {x} Active link.

• Created - The date when the customer account was added to the system.

📝 **Note**

You can filter the columns displayed in the customers table by clicking the ⊞ Show columns link. After choosing the desired columns, click **Apply** in order to save the changes. Likewise, if you cannot see some of the columns, it is likely that they have been disabled using this control.

Searching the Customer Accounts List

    When you are searching for specific customer accounts, you can use one or more of the available filters:

Show customer accounts {name} with status {status}, where:

• {name} - Use the available text box to specify the name of the customer accounts you are looking for.

• {status} - Use the drop-down list to select the customer accounts status. By default, only the Active accounts are shown. The available options are:

  ◦ All

  ◦ Active

  ◦ Suspended

⚠ **Caution**

A customer account cannot be removed if it was used for placing at least one order!

Add a New Customer Account

> **Note**
>
> You cannot manually add a customer account if the maximum number of customer accounts specified in the license has been reached.
>
> When you cannot manually add a customer account, the icon is displayed in the `Tools` area.

To manually add a new customer account, follow the next steps:

1. Click the Customer accounts link available in the left navigation panel.
2. In the Customer Accounts Management page, click the Add customer account icon located in the `Tools` area.
3. You can customize the new customer account by filling in the information available in the two areas of the Add New Customer Account page, that will be described in the next sections:

Customer Account Information

Fill in the following fields to have the complete contact information for the new customer account:

- First name - The customer account's owner first name.
- Last name - The customer account's owner last name.
- Company - The customer's company.
- Login - The username required to log in to the online store.

> **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: **_.-@.**

- Password auto generation – When this option is enabled, a password matching the chosen strength level is automatically computed. Also, you will not be required to fill in the next two fields.

> **Note**
>
> To set up the password strength, click the 🖾 Unified Communications link available in the left navigation panel and then on the 🖉 **Login preferences** icon.

- Password – In order to be valid, the password must be at least five characters long and must comply with the strength level currently set up.

  While you type in your password, a colored bar will inform you about the strength of the chosen combination.

> **Note**
>
> To set up the password strength, click the 🖾 Unified Communications link available in the left navigation panel and then on the 🖉 **Login preferences** icon.

> **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 password - Use the available text box to retype the password.
- Email - The customer account's owner contact email address.
- Phone number - The customer account's owner contact telephone number.
- Fax - The customer account's owner contact fax number.
- Street address - The customer account's owner complete address.
- City - The customer account's owner home city.
- Zip - The customer account's owner postal code.
- Country - Use the drop-down list to select the customer account's owner country.

- State/Province - Use the drop-down list to select the customer account's owner province. If the selected country has no available provinces, this line is disabled.

- Preferred language – Use the drop-down list to choose the language the interface is displayed in. All the email notifications will be sent in this language as well. The list contains all the currently available languages.

- Notes – Use this text box to insert comments on the customer account.

Billing Information

Fill in the following fields to configure the billing address that will be used for charging your customer account's invoices:

- Use the customer account information - Select this check box if you want the details you entered in the Customer Account Information area to be used in the Billing Information area.

- First name - The first name you want to use for invoicing the customer account.

- Last name - The last name you want to use for invoicing the customer account.

- Company - The company you want to use for invoicing the customer account.

- Email - The contact email address you want to use for invoicing the customer account.

- Phone number - The contact telephone number you want to use for invoicing the customer account.

- Fax - The contact fax number you want to use for invoicing the customer account.

- Street address - The complete address you want to use for invoicing the customer account.

- City - The city you want to use for invoicing the customer account.

- Zip - The postal code you want to use for invoicing the customer account.

- Country - Use the drop-down list to select the country you want to use for invoicing the customer account.

- State/Province - Use the drop-down list to select the province you want to use for invoicing the customer account. If the selected country has no available provinces, this line is disabled.

- Tax account no - Use the available text box to specify the tax account number you want to use for invoicing the customer account.
- Tax applied {value} % - Use the available text box to specify the local tax (for example VAT) that will be applied to all the customer's invoices. The possible values range from 0 to 100. The value you set up here overrides the value set in 🐾 Setup >> Taxes section.
- Bank name - Use the available text box to specify the bank name where the customer has his account used for paying the invoices.
- Bank account - Use the available text box to specify the customer's bank account number that will be used for transactions within Automation.
- Preferred currency – Use the drop-down list to choose the customer account's preferred currency.
- Use as default - Select this check box if you want to set this billing address as the default one to be used for the customer's invoices.
- Notes – Use this text box to insert comments on the billing address.

After you have finished filling in all the fields, click Ok to set up the new customer account. Click Cancel to return to the previous page without saving the information.

> ⚠ Caution
>
> All the **Required fields** have to be filled in to set up the customer account!

Edit a Customer Account

If you want to edit the details of a customer account, follow these steps:

1. In the Customer Accounts Management page, choose the desired customer account and click its name.
2. A new page allowing you to edit both the Customer Account Information and the Billing Information opens.

Edit the Customer Account Information

Use this area to change the account owner's contact information.

> 📒 Note
>
> For more details on how to modify these fields, see the Customer Account Information section.

> **Note**
>
> If you want the new information to be emailed to the customer account owner and the administrator, select the **Resend contact details** check box.

Edit the Billing Address

This section allows you to add, view or modify the billing addresses used to charge the customer account's invoices.

View the Billing Addresses List

The Billing Information list displays all the billing addresses available in the system for that particular customer account.

VoipNow Automation provides the following details about each address:

- S – The billing address status:
  - ☑ Enabled
  - ☒ Disabled

  Click this icon to enable/disable a billing address. The default address cannot be disabled.

  > **Note**
  >
  > The disabled billing address cannot be used when placing a new order!

- Name - The customer account name. It displays the account's owner first and last names.

  > **Note**
  >
  > On click, a pop-up panel is displayed, allowing you to view/edit the details of a particular billing address. For more information about the available fields, see the Billing Information section.

- Email - The customer's contact email address.

  Click the address link to send an email message to the selected customer.

- Phone number - The customer's contact telephone number, formated in an easy to display format, like in VoipNow Professional.

- Country - The customer's shipment country.

- Bank account - The bank account number specified for a billing information address.

> **Note**
>
> The default billing address is highlighted using bold text.

The billing information list can be sorted by status, name, email, phone number, country and bank account. To do so, click a table header link. A highlighted table header marks the criteria used to sort the table and the arrow indicates how the billing information list was sorted. The sort direction can be changed by another click on that header.

> **Note**
>
> You can filter the columns displayed in the billing addresses table by clicking the ⊞ Show columns link. After choosing the desired columns, click **Apply** in order to save the changes. Likewise, if you cannot see some of columns, it is likely that they have been disabled using this control.

Add New Billing Address

In order to add new billing address for the current customer account, click the 🥮 Add billing address icon. The displayed pop-up panel allows you to fill in the required details.

> **Note**
>
> For more details on how to fill in the required details, see the Billing Information section.

Remove a Billing Address

To remove one or more billing addresses, follow the next steps:

1. Choose the addresses you want to delete by selecting their corresponding check boxes in the Billing Information list.

2. Click the ✖ Remove selected link.

3. Review the list. If you want to proceed with the removal, select the `Confirm the removal` check box and click Ok. Otherwise, click Cancel to return to the previous page without deleting anything.

> ⚠️ **Caution**
>
> A customer account's billing address cannot be removed if it is linked to an existing order!

Chapter 3
Store Items

> **Note**
>
> Access to the 🛡 Store items area is permitted only:
>
> - To **Administrator** level users.
> - If the number of customer accounts is smaller than or equal to the maximum number of customer accounts allowed by the current license.

Items Management

A platform plug-in defines an item family. Currently, VoipNow Automation supports only one platform plug-in, the VoipNow Professional account.

This section allows administrators to create and manage items that can be purchased from the online store. Basically, items are products or services defined with a specific deployment strategy. We currently support standalone items that will be deployed as VoipNow Professional account on the provisioning servers as well as add-ons that can be attached to these accounts such as a

credit recharge and account limits. 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.

> **Note**
>
> The cloud building bricks must be configured before in order for the platform plug-in to be functional!

The Items Management page allows you to:

- View the available store Items.

- Define new items for the online store by clicking the 🗿 Add item icon available in the Tools section.

  > **Note**
  >
  > You cannot add an item when:
  >
  > ◦ There is no platform plug-in defined and configured.
  >
  > ◦ The platform plug-in does not have a standalone cloud building brick configured.
  >
  > In this cases, the 🗿 icon is displayed.

- 🗿 Manage categories and set up new ones in order to group multiple similar items.

- Change an item's status.

- Search the items list using specific criteria.

- Remove items that were never ordered.

VoipNow Automation displays the following information about each item:

- S - The item's status:
  - 🗿 Active
  - 🗿 Suspended
  - 🗿 Withdrawn

  Click this icon to change the status of the currently selected item. On click, a pop-up panel is displayed, allowing you to choose the action you want to be performed on the item, depending on its current status:
  - For Active items:

- ▪ `Suspend item` - The item will not be temporary displayed in the online store.

- ▪ `Withdraw item` - The item will never again be displayed in the online store. This is a final state.

- ◦ For Suspended items:

  - ▪ `Activate item` - The item will be available again in the online store.

  - ▪ `Withdraw item` - The item will never again be displayed in the online store. This is a final state.

- ◦ The status of a Withdrawn item cannot be changed.

By default, only the Active items are shown in the online store.

- • T - The item type:

  - ◦ 🟢 Single standalone item

  - ◦ 🔵 Bundle standalone item

  - ◦ 🧩 Add-on item

For more details on each type, check the <u>Add a New Item</u> section.

- • SKU - The item SKU (Stock Keeping Unit). This is an unique identifier, specific to each item available in the online store.

  Click the selected item name if you want to view/edit its information. For more details, check the <u>Edit Item Details</u> section.

- • Category - Categories are used to group similar store items, helping the customer to easily find the desired item. This column displays the category to which an item is assigned to. Only the top level category is displayed. If the item is assigned to more than one category, then click the category name to see all of them. If an item belongs both to a parent and a child category, then the child category is displayed indented, under the parent category.

- • Position In Store - The position the item is displayed in the online store.

- • Charge - This column displays the item setup charge and the fee the user has to pay periodically for the deployed service. The amounts are shown using the Automation default currency defined in the 🟢 <u>Setup</u> >> Behaviour >> General tab.

- • Deployments - This column shows the number of times a product instance of this type has been deployed.

- • Updated - The date when the item was last modified.

> ⚠ **Caution**
>
> An item cannot be removed if there are orders issued for it!

Searching the Items List

When you are searching for specific items, you can use one or more of the available filters:

Show items {name} {with} presentation in {language} with status {status} from category {category}, where:

- {name} - Use the available text box to specify the name of the items you are looking for.

- {with} - Use the drop-down list to select whether you want to search for items with or without a presentation in a certain language.

- {language} - Use the drop-down list to select the presentation language the items you are looking can be displayed in the online store. The list contains all the presentation languages configured from the 🐸 Setup >> Behaviour >> Online Store section.

  If you want to skip this filter, then select the `Ignore the language filter` search criteria.

- {status} - Use the drop-down list to select the items status. By default, only the `Active` items are shown in the items list. The available options are:
  - `All`
  - `Active`
  - `Suspended`
  - `Withdrawn`

- {category} - Use the drop-down list to select the category for which the items are displayed. Select `All` if you want to display all items from all categories.

Add a New Item

> 📒 **Note**
>
> You cannot add an item when:

- There is no [platform plug-in](#) defined and configured.

- The platform plug-in does not have a standalone [cloud building brick](#) configured.

Note

It is advisable, but not mandatory, to [create a category](#) before adding an item. This will allow you to group all the similar items under a suggestive category. In this way, the customer will easily find the store items he is looking for.

Caution

If there are items assigned to a category, then the ones that do not belong to a category will not be displayed.

If no item is assigned to a category, then all the items will be displayed in the online store.

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 chosen item family and type. The dynamic sections use the platform bricks configured for the chosen platform plug-in.

The fixed sections are:

- **Item Information**
  ◦ **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](#). Currently, only one item family is supported: VoipNow Professional account.

  Depending on your selection, the dynamic sections are populated.

  Note

  The dynamic section presentation is based on the currently supported item family: **VoipNow Professional account**.

  ◦ **Item type** - Use the radio buttons to select the item type, depending on the chosen item family.

> **Note**
>
> For the **VoipNow Professional account** family, the default value is `Standalone`. These items are deployed as **VoipNow Professional accounts** on the provisioning server. From VoipNow Automation 2.1.5, this family also supports `Add-on` items deployed as recharge credits or account limits on standalone items.

◦ Picture - You can associate an image to each item to make it more attractive in the online store. Use the [Browse] button to locate the file 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:

- Available categories - The list displays all the existing categories the item can be assigned to. To assign the item to a certain category, click the name of that category.

- Assigned categories - The list displays all the categories the item has been assigned to. Click a category name to remove it from the list.

The categories are used to group similar items.

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

> **Note**
>
> This option is displayed only when there are categories defined in the system.

> **Note**
>
> Keep in mind that if there are items assigned to a category, the items that do not belong to one will not be displayed in the online store.

◦ Notes - Use the available text box to fill in additional information about the item.

- Suspension and Termination

> **Note**
>
> This section will be displayed only for standalone items and add-on items which support suspension and/or termination. Currently, the recharge credit and the account limits add-ons defined for the **VoipNow Professional account** family do not support neither suspension nor termination.

◦ **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. The allowed values range from 1 to 23,796 hours. The default value is 360 hours.

◦ **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.

> **Note**
>
> The number of hours until the item is terminated must always be greater than the number of hours until the item is suspended.

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

- Store Presentation

◦ **Is active in store** - Select this check box if you want the item to be right away active in the online store. If this option is disabled, than 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. The allowed values range from 1 to 65,535. The default value is the first available position. More items can share the same position.

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

◦ **Item description in {language}** - Use this text area to insert a brief item 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 the item name and the item description are mandatory only for the default language.

- Billing

  ○ Charge for setup {x} {currency} - Use the available text box to specify the amount you want to charge the customers for setting up the item.

  ○ Charge for service {y} {currency} - Use the available text box to specify the amount you want to periodically charge the customers for the deployed services.

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

    ▪ one time

    ▪ monthly

    ▪ quarterly

    ▪ yearly

    > **Note**
    >
    > The default **{currency}** is the one defined in the 🐸 Setup >> **Behaviour** >> **General** >> **Default currency** field.

    > **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.

> **Note**
>
> When an item is purchased the customer will pay the first month subscription fee. The next recurrent invoice is generated after the deployment is fulfilled, at the date set up by the administrator in the Setup >> **Behaviour** >> **Order & Invoices** tab.
>
> For more information regarding the recurrent invoice generation process, consult the **Automation Scheduled Tasks** manual.

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

1. 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.

2. > **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.

> **Note**
>
> If, after finishing setting up an item, you want to add another one, then select the **Add another item** check box.

Edit an Item

> **Note**
>
> When you are trying to edit an item that has active services deployed, the following warning is displayed on the top of the page:
>
> ```
> Because you are editing an item that has deployed instances,
> you cannot modify some parameters. Pay attention, the changes
> are applied to all the item's currently deployed instances!
> ```

The Edit Item {item_name} page allows you to edit the item's details. Not all the options previously set up can be modified. Like the settings from the Add New Item page, these settings are also grouped into fixed and dynamically populated fieldsets. The dynamic fieldsets depend on the item family and type. Currently, only one item family is supported, VoipNow Professional account:

- The following fixed fieldsets are available:

  ◦ Item Information - Use this section to modify the item's general details. For more information about the available options, see [this](#) section.

  One extra line is displayed:

    ▪ Existing picture - This field is available only if there is an existing image attached to the item. You can click the image name and a pop-up panel containing the image preview will be displayed. To delete the picture, click the removal icon ✖.

> ⚠ **Caution**
>
> The item type cannot be modified if there are active orders for that item!

- ◦ **Billing** - Use this section to modify the billing information. For more information on the available lines, see [this](#) section.

- ◦ **Suspension and Termination** - Use this section to edit the conditions that lead to account suspension or termination. For more information on the available lines, see [this](#) section.

> 📝 **Note**
>
> This section will be displayed only for standalone items and add-on items which support suspension and/or termination. Currently, the recharge credit and the account limits add-ons defined for the **VoipNow Professional account** family does not support neither suspension nor termination.

- ◦ **Store presentation** - Use this section to change the item's store presentation. For more information on the available lines, see [this](#) section.

- • The dynamically populated area is grouped the following sections according to the chosen item family and type:

> 📝 **Note**
>
> Keep in mind that this area depends on the item family. The presentation of this area is based on the currently supported item family: **VoipNow Professional account**.

1. For the Standalone item type:

   - ◦ **Deployment Settings** - Use this section to modify the details regarding the server's weight. For more information on the available lines, see [this](#) section.

   - ◦ **User Template** - Use this section to modify the user template's settings and the number of slave accounts to be pre-configured along with this user. For more information on the available lines, see [this](#) section.

   > ⚠ **Caution**
   >
   > The following details cannot be modified if there are active orders for that item:

- **Account to deploy**

- **Use account creation template**

◦ Charging - Use this section to modify the charging information. For more information on the available lines, see [this](#) section.

> ⚠ Caution
>
> The following details of the item being currently edited cannot be modified if there are deployed accounts for the corresponding order:
>
> - **Charging strategy**
> - **Charging plan**

2. 📒 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 - Use this area to modify the add-on template's settings. For more information on the available lines, see [this](#) .

> ⚠ Caution
>
> The following details cannot be modified if there are active orders for that item:
>
> - **Use recharge package**

> ⚠ Caution
>
> If the edited add-on belongs to the `Account limits` plug-in layer, then none of the options available in this fieldset cannot be modified!

◦ Credit - This area allows you to supplement the charging credits enforced by the VoipNow Professional account's charging plan.

Click Ok to save the changes. Click Cancel to discard all changes and return to the previous page.

Categories Management

The items can be assigned to one or more categories. This section allows users to customize specific categories for their items.

> ⚠ **Caution**
>
> If there are items assigned to a category, then the items that do not belong to a category are not available in the online store.
>
> If no item is assigned to a category, then all the items are available in the online store.

The Categories Management page allows you to:

- View the already defined Categories.
- Set up a new category by clicking the 🛠 Add a category icon available in the Tools section.
- Search the categories list using specific criteria.
- Remove categories.

VoipNow Automation displays the following information about each category:

- S - The category's status:
  - ✅ Enabled
  - ❌ Disabled

  Click this icon to change the item status:
  - Enabled - Click to disable the category. A disabled category and its items are not shown in the online store. If you disable a parent category, all the child categories are disabled as well.
  - Disabled - Click to activate the category. The category will be visible again in the online store. If you enable a parent or a child category, all the other related categories are enabled as well.
- Name - The category's name. Click the category name link if you want to view/edit its information.
- Upper Category - The parent category's name. Click the chosen upper category name link if you want to view/edit its information.
- Items - The number of items contained by that category, ignoring the items in the child categories. If you click the number link, the Items Management page corresponding to that category is displayed.

- Position in Store - The position on which the category is displayed in the online store.

- Updated - The date when the category was last modified.

> ⚠ **Caution**
>
> Only the empty categories, that do not contain any items, can be deleted.

Add a New Category

Use the available controls to define a new category:

- Category Information

  ◦ Name - The category's name.

  ◦ Upper category - Use the drop-down list to select the parent category. Each level is displayed indented. This field is not required, because you can also add a first level category.

  ◦ 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.

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

- Store Presentation

  ◦ Category position in store - Use the available text box to specify the position the category will be displayed in the online store. The allowed values range from 1 to 65,535. The default value is the first available position. A key can be used more than once.

  ◦ Category name {text} in {language} - Use the available text box to specify the category name in {language} language that will be displayed in the online store.

  ◦ Category description in {language} - Use this text area to insert a brief item description that must be 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.

Click Ok to save the category. Click Cancel to return to the previous page without saving the new category.

Edit a Category

If you want to edit a category's details, follow these steps:

1. In the Category Management page, choose the desired category and click on its name.

2. A new page allowing you to edit the category's details opens. They are grouped in several sections:

   - Category information - Use this section to modify the category's general details. For more information on the available lines, see the [Add a New Category](#) section.

     One extra line is displayed:

     - ◦ Existing picture - This field is displayed only if there is an existing image attached to the category. You can click the image name and a pop-up window containing an image preview will be displayed. To remove the picture, click the ✖ icon.

   - Store presentation - Use this section to change the category's store presentation. For more information on the available lines, see the [Add a New Category](#) section.

3. Click Ok to save the changes. Click Cancel to discard all changes and return to the previous page.

Chapter 4
Order Deployment

> **Note**
>
> Access to the 📇 Order deployment area is permitted only:
>
> - To the **Administrator** user.
> - If the number of customer accounts is smaller than the maximum number of customer accounts allowed by the user's license.

The order deployment is the last step of the order placed by a customer on the online store. After the payment has been received, the ordered items can be deployed on the provisioning server. An item purchased from the online store becomes a service after its deployment. These items can be scheduled for deployment either automatically, if the Deploy orders automatically option has been previously enabled from the 🧩 Setup >> Behaviour >> Orders & Invoices tab, either manually, by the system administrator if and only if all the due invoices have been paid.

> ⚠️ **Caution**
>
> No deployment operation can be performed on a VoipNow Professional server that it is not an **Automation** agent. This means that if the VoipNow Professional license does not offer **Automation** support, then it cannot be enrolled as a deployment server.

> 📝 **Note**
>
> If at least one of the enrolled VoipNow Professional agents has **Automation** enabled in his license, then you can add unlimited customer accounts.

The Orders Deployment Management page allows you to:

- View all the currently Deployed Services.

  > 📝 **Note**
  >
  > The list displays only the standalone, master services ordered by date, having the last instance deployed first. The slave and add-on deployments can be viewed in the expanded details for the master deployment.

- Manage the 🗃 [Provisioning servers](#) .
- Search for specific deployed services using the available advanced controls.
- Schedule for Activation/Suspension/Termination a service.
- Cancel a service activation.

VoipNow Automation displays the following information about each deployed service:

- **ID** - The deployment identifier. The deployment status can be:
  - 🟩 Active
  - 🟨 Pending
  - 🟧 Suspended
  - ❌ Terminated
  - ⬜ Canceled

  Click the icon or the ID link of an active service to view its deployment log. On click, a pop-up panel is displayed, providing the following information:
  - Transition From {status_1} to {status_2}
  - Deployed by - The instance that performed the deployment:

- ▪ `Automatic` - The services were automatically deployed because the Deploy orders automatically options was selected from the 🧩 Setup >> Behaviour >> Orders & Invoices tab.

- ▪ `[Administrator username]` - The service was manually scheduled for deployment by the system administrator.

○ Date - The date and time when the deployment was performed.

○ Outcome - The outcome of the deployment process: `Success` or `Failed`.

○ Message - A detailed message regarding the success/failure of the operation. When the operation fails, the reason is provided (e.g.: `Failed (255: Invalid parent login)`).

○ Last invoice - The following details are available: the number of the invoice, the date and time when it was issued and the type of invoice.

○ Next invoice - The date when the next invoice is to be issued is displayed in this field.

Note

Some of these fields might be missing or empty in the case of slave or add-on deployments.

Here is an example:
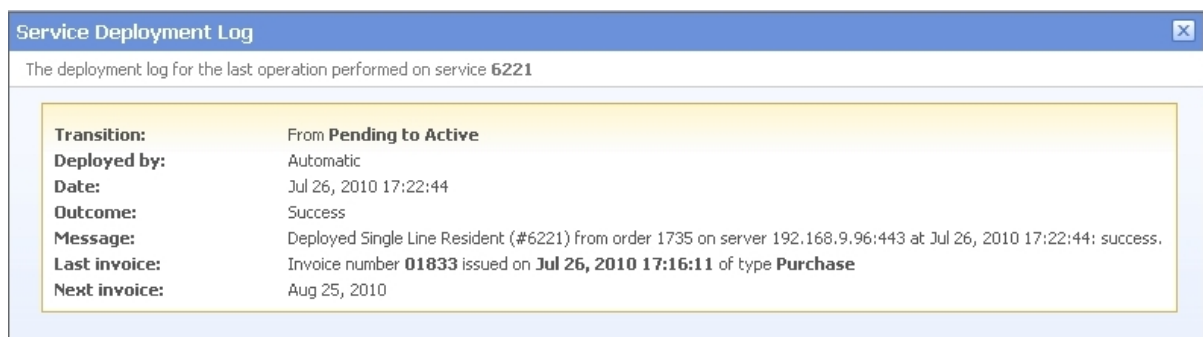
Account deployment log pop-up panel

Note

If there was no deployment attempted for the service, the pop-up window will only display the following information:

○ **Deployment**

○ **Last invoice**

◦ **Next invoice**

- D - The marker for deployment folded/collapsed details. Deployment details display all slave and add-on deployments attached to the current standalone master deployment. The marker is displayed using one of the following icons:

  ◦ ▣ Folded deployment details

  ◦ ▣ Collapsed deployment details

  ◦ ▣ No deployment details

On collapse, the following information is displayed on each slave/add-on deployment:

  ◦ T - The deployment type:

    ▪ 🔵 Slave

    ▪ 🟧 Add-on

  ◦ ID - The deployment identifier.

  ◦ Service - The service's SKU (Stock Keeping Unit).

  ◦ Order No - The order number. Click the link to view the order overview.

  ◦ Deployed - The date when the service was deployed. If it was not deployed yet, then '-' is displayed.

  ◦ Status - The service's status.

  ◦ Operation - Click the Choose link to display a pop-up panel with the available operations on the service. Depending on the service's current status, the content of the panel varies.

> 📝 Note
>
> For more information on each field please check below.

- Service - The service's SKU (Stock Keeping Unit). For active standalone master deployments, if there are any add-on store items defined in the system, a shortcut link (Add add-on) to the order page is displayed.

- Server - The hostname of the server the service was deployed on. This column displays a '-' if the deployment hasn't been done yet. Between parentheses, the server's utilization is shown (e.g.: `192.168.4.171:8550 (3.22%)`).

- Customer Account - The name of the customer account who placed the order on the online store or on behalf which the system administrator manually placed an order from the interface.

Click the chosen customer account name if you want to view/edit his information. For more details, check the Edit a Customer Account section.

- Order No - The order number.

  Click the chosen order number if you want to view/edit its details. For more information about this, check the Order Overview section.

- Deployed - The date when the service was deployed. If it was not deployed yet, then '-' is displayed.

- Status - The service's status. The possible values are:

  - Active - Displayed if the service is active on the provisioning server.

  - Pending - Displayed if the service has been ordered, but it has not been deployed yet on a server.

  - Suspended - Displayed if the service was suspended on the provisioning server.

  - Terminated - Displayed if the service was deleted from the provisioning server.

  - Canceled - Displayed if the service was not yet deployed on a provisioning server. The deployment will not take place until the status is changed to Pending and the service is Activated.

  There are also transitional statuses displayed as follows:

  Status_crt (Operation in progress)

  where:

  - Status_crt represents the current status.

  - (Operation in progress) is the transition to a new status.

  For example, Pending (Activation in progress) is displayed when a service had been scheduled for activation and it is in the processing queue. This is a transition between the initial status and the final one, that is Active.

  The deployment process may fail. Each failed attempt is recorded into the database. The Pending (Activation in progress) attempts: {number} failed transitional status is displayed when the activation process has failed several times and the service is not in the processing queue anymore. If you click the {number} link, then the service is going to be rescheduled for deployment and it will be placed again in the processing queue.

- Operation - Click the Choose link to display a pop-up panel with the available operations on the service. Depending on the service's current status, the content of the panel varies. The following operations are allowed for a service:

◦ Activate/Reactivate - This operation schedules for creation the service on the provisioning server. If the service existed on the server and had been previously suspended, the Reactivation operation schedules it for activation again.

> **Note**
>
> A service cannot be activated if:
>
> - The customer account's owner that placed the order is suspended.
>
> - The order to which the deployment belongs is not in **NEW** or **FULFILLED** status,
>
> - For slave or add-on deployments, the standalone master deployment has to be deployed, active and not scheduled for termination.
>
> - The invoice issued for the order is not paid.
>
> - If the payment was made by check or by wire transfer, then the invoice must be manually captured from the Invoices section.

> **Note**
>
> This operation is available only if the service's status is either **Pending** or **Suspended**.
>
> For standalone master deployments, you have the possibility to schedule for activation slave and add-on deployments along with the master deployment.

◦ Suspend - This operation schedules for suspension the service located on the provisioning server.

> **Note**
>
> For master deployments, this operation is available only if the service is in the **Active** status.
>
> For add-on deployments, this operation is available only if the respective add-on type supports suspension.

◦ Terminate - This operation schedules for termination the service located on the provisioning server.

> **Caution**
>
> This operation schedules for removal the service and cannot be reversed!

> **Note**
>
> For master and slave deployment, this operation is available only if the service is in the **Active** or **Suspended** statuses.
>
> For add-on deployments, this operation is available only if the service is in the **Active** or **Suspended** statuses and the respective add-on type supports termination!

◦ Cancel - This operation cancels the creation of the service on the provisioning server.

> **Note**
>
> This operation is available only if the service is in the **Pending** status.

◦ Cancel {operation} - This operation cancels the previously scheduled operations that is in progress at that moment.

> **Note**
>
> This operation is available only if the service is in one of the following transitional statuses:
>
> - **Activation in progress**
> - **Termination in progress**
>
> For master deployments, you also have the possibility to cancel slave and add-on deployments along with the master deployment.

◦ Pending - This operation sets the status of a service from Canceled to Pending. This allows the service activation if the Activate operation is performed afterwards.

> **Note**
>
> This operation is available only if the service is in the **Canceled** status.

If you Choose any of the available operations, you will be able to provide a reason for your action. In the Operations pop-up window, two fields are displayed:

◦ Reason - The available motives are:

- '-'

- Other

- ◦ Description - You can use the available text box to comment your action.

- ◦ {Action} with slave(s)/add-on(s) - You can use this check box to schedule slaves and add-ons along with master standalone deployment for the respective operation. This setting is displayed only for the following transitions:

  - ▪ From Pending to Active

  - ▪ From Canceled to Pending

Even if you have not used any of the two fields previously mentioned, you have to click the 🖫 Save icon in order to confirm the selected operation.

> ⚠ Caution
>
> If you chose the **Terminate** operation, you will be required to select the **Confirm account termination** check box in order to finalize the process.
>
> Be aware that this operation is going to schedule for removal the service and it can not be reversed.

Searching the Deployed Services List

When you are searching for specific master standalone deployed services, you can use one or more of the available filters:

Search deployed service {filter} with status {status} for customer account {customer_account} deployed on server {hostname} between {start_date} and {end_date}

where:

- {filter} - Use the available text box to specify the SKU (Stock Keeping Unit)/order number/deployment identification number of the service you are looking for.

- {status} - Use the drop-down list to select the status of the service instance. The available options are:

  - ◦ All

  - ◦ Pending

  - ◦ Active

  - ◦ Terminated

  - ◦ Suspended

  - ◦ Canceled

- {customer_account} - Use the available text box to specify the name or the email of the customer account.

- {hostname} - Use the drop-down list to select the address of the server on which the deployments have been made. You can select either `All` the servers, either a specific one.

> **Note**
>
> If there are no servers in the list, you can add one from the **Provisioning Server Management** page by clicking the **Add servers** icon.

- {start_date} - Use the text box or the calendar to specify the start date for the deployment range filter.

- {end_date} - Use the text box or the calendar to specify the end date for the deployment range filter.

Manage the Provisioning Servers

> ⚠ **Caution**
>
> No deployment operation can be performed on a VoipNow Professional server that it is not an **Automation** agent. This means that if the VoipNow Professional license does not offer **Automation** support, then it cannot be enrolled as a deployment server.

The Provisioning Servers Management page allows you to:

- View the available Provisioning Servers.

- Set up new provisioning servers by clicking the [Provisioning servers] icon available in the Tools section.

- Search for certain servers.

- Update server's connection status.

- Manage the [deployment logs] .

- Remove the servers that do not have any instances deployed on them.

VoipNow Automation displays the following information about each provisioning server available in the system:

- S - The provisioning server's status:

- ◦ ✅ Enabled

- ◦ ❌ Disabled

- ◦ ❌ Softdown

Click the icon to change the server's status.

> 📝 **Note**
>
> Only the **Enabled** provisioning servers can be used for deployment!

- **T** - The server's type:

  - ◦ 🌐 VoipNow Professional server

- **Hostname** - The provisioning server's IP address and port.

  Click this link to edit the server preferences. For more information, check the Edit a Provisioning Server section.

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

  You can access the server by clicking this link.

- **Utilization** - This field displays the provisioning server's workload. The utilization is computed based on the limits imposed on the server and it is displayed in percents. Clicking the Refresh link will update the server's utilization. A pop-up panel with the following statistics is displayed:

  - ◦ Server {hostname} is used {utilization}

  - ◦ Resellers: maximum {x}/used {y} {z% used}

  - ◦ Clients: maximum {x}/used {y} {z% used}

  - ◦ Phone terminals extensions: maximum {x}/used {y} {z% used}

  - ◦ Queue extensions: maximum {x}/used {y} {z% used}

  - ◦ IVR extensions: maximum {x}/used {y} {z% used}

  - ◦ Conference extensions: maximum {x}/used {y} {z% used}

  - ◦ Voicemail center extensions: maximum {x}/used {y} {z% used}

  - ◦ Queue login center extensions: maximum {x}/used {y} {z% used}

  Here is an example:
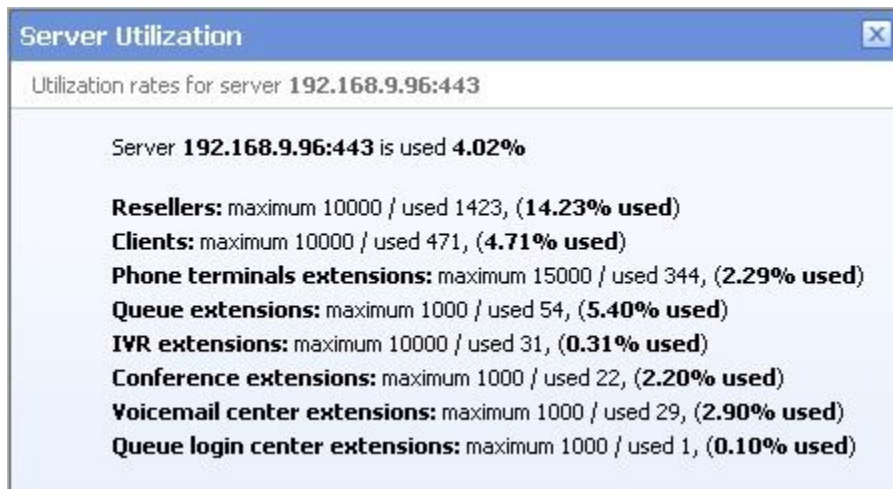
Server utilization pop-up panel

- **Weight** - 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). For more information about the server weight, check the Add a Provisioning Server section.

> **Note**
>
> The server weight displayed here must be greater than the weight specified in the **Deploy on servers with weight greater than** line during the deployment service's creation. If not, then the deployment cannot take place.

- **Operation** - This column displays the connection status that can be either `Up`, either `Down`. Click the Update link in order to update connection status. If the connection fails, than server's status will be changed to Softdown. The connection status is checked using the protocol defined at the Connection protocol from the Add Provisioning Server page, for example SOAP.

> **Note**
>
> The possible reasons for which a **VoipNow Professional** server can be `Down` are:
>
> ◦ The currency used in **Automation** is not identical with the server's.
>
> ◦ Charging is globally disabled on the remote server.
>
> ◦ The connection key or the administrator's username are no longer valid.
>
> ◦ The access to SOAP API is disabled for administrator user. For more details on how to enable it please check the **VoipNow Professional User Guide**.

- The **VoipNow Professional** version is not 2.5.0 or greater. Automation checks the ultimate version of the provisioning server and upgrades the connection parameters from Automation to the greatest version supported.

- The `https` or the MySQL services no longer run on that server.

- The SOAP version required by **Automation** does not exist on the provisioning server.

- Logs - Click the Records link to see the deployment logs for the server. If there are no logs available, '-' is displayed. For more information, see the Deployment Logs section.

- Updated - The date and time when the server's settings were last modified.

> ⚠ Caution
>
> A provisioning server cannot be deleted if:
>
> - Services have been deployed on it.
> - The connection to the server is down.

> 📝 Note
>
> When a provisioning server is deleted, it is withdrawn from VoipNow Automation as well.

The Deployment Logs

The Deployment Logs page displays a table with all the actions that took place on a server. The following information is displayed:

- Operation - The type of the performed operation:
  - Created - The service had been successfully deployed on the provisioning server.
  - Activated - The service had been successfully activated on the provisioning server.
  - Suspended - The service had been successfully suspended on the provisioning server.
  - Destroyed - The service had been successfully terminated on the provisioning server.
- Order No - The order the service belongs to.

Click the link to see the order's details. For more information, check the Order Overview section.

- Customer account - The customer account's name.

- Item SKU - The SKU of the item that generated the log.

- By - The instance that generated the action that led to this log:

  ◦ `Automatic`

  ◦ `[Admin_name]`

- Date - The date and time when the log was created.

- Outcome - The transaction outcome. The possible values are:

  ◦ Success - Click on this link to see a detailed overview of the transaction attempt, which will be displayed in a pop-up window.

  ◦ Failed - Click on this link to see a detailed overview of the transaction attempt, which will be displayed in a pop-up window.

  ◦ Could not connect - Click on this link to see a detailed overview of the transaction attempt, which will be displayed in a pop-up window.

This pop-up window displays the following information:

◦ Operation

  ▪ `Created`

  ▪ `Activated`

  ▪ `Suspended`

  ▪ `Destroyed`

◦ Deployed by

  ▪ `Automatic`

  ▪ `[Admin_name]`

◦ Date

◦ Item

◦ Outcome

  ▪ `Success`

  ▪ `Could not connect`

  ▪ `Failed`

Here is an example:

Log details

Searching the Deployment Logs List

When you are searching for specific logs, you can use one or more of the available filters:

Show logs between {date_start} and {date_end} with action {action} and outcome {outcome} for item {product_SKU} and customer account {customer_account} and order no {order_no}, where:

- {date_start} - Use the available text box or the ▦ calendar button to specify the lower limit of the time interval in which you want to search for particular logs. The default value is the beginning of the current month. The date format must be yyyy-mm-dd.

- {date_end} - Use the available text box or the ▦ calendar button to specify the upper limit of the time interval in which you want to search for particular logs. The default value is the current date. The date format must be yyyy-mm-dd.

- {action} - Use the drop-down list to select the operation type you are looking for. The available options are:
  - Does not matter - Displays all the deployment logs.
  - Created - Displays the deployment logs for all the created services.
  - Active - Displays the deployment logs for all the services that are active on the provisioning server.
  - Suspended - Displays the deployment logs for all the services that are suspended on the provisioning server.

- ◦ `Destroyed` - Displays the deployment logs for all the services that were terminated and have been removed from the provisioning server.
- `{outcome}` - Use the drop-down list to select the outcome of the deployment process that you are looking for. The available options are:
  - ◦ `Does not matter` - - Displays all the deployment logs.
  - ◦ `Success` - The specific process was a success.
  - ◦ `Could not connect` - The provisioning server could not be reached.
  - ◦ `Failed` - The specific process failed and could not be finished.
- `{product_SKU}` - The item Stock Keeping Unit.
- `{customer_account}` - The customer account's owner first and last names.
- `{order_no}` - The order number.

Add a Provisioning Server

> ⚠ Caution
>
> Only servers running VoipNow Professional 2.5.0 or later may be added.

> 📝 Note
>
> Starting VoipNow Professional 2.5.1, the VoipNow Professional deployment servers are considered agents in **Automation**.
>
> Therefore, at server enrollment, the agent's VoipNow Professional license is verified to check if **Automation** is enabled and it is allowed to be an agent. If not, the server cannot be added and used for deployment.

> ⚠ Caution
>
> If an user purchased a VoipNow Professional license with **Automation** enabled and enrolled the server as an **Automation** agent, but later changed the license type to one that does not support this feature, then he will NOT be able to add customer accounts anymore.

> 📝 Note
>
> Depending on the item family and its specific provisioning server type, the **Add a Provisioning Server** page's sections are dynamically generated.

For the moment, only the **VoipNow Professional Node** provisioning server type, specific to the **VoipNow Professional account** item family, is supported.

⚠ Caution

Have in mind that the time zone used by the provisioning servers may be different than the one set up on the **Automation** server! This fact must be taken into consideration when verifying the calculated consumption for a certain time period.

The Add New Provisioning Server page provides all the controls required to set up a new deployment server. The content is dynamically generated, depending on the server type. Options like Hostname/IP or Connection timeout are general, while others are specific to each server type.

For the VoipNow Professional Node server type, the options are grouped into the following fieldsets:

- Server Type

  ◦ Server type - Use the drop-down list to select the deployment server type.

    📝 Note

    For the moment, only the **VoipNow Professional Node** server type is supported.

- Server Connection

  📝 Note

  Depending on the selected server type, some of the settings displayed in this section will vary. The options that will remain unchanged no matter the server type 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.

  ◦ **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.

◦ 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 on the remote server in the 📧 Unified Communications >> Encryption Keys Management page. A key is unique and can be used by only one server.

> 📝 Note
>
> The **Current API key** must be chosen!

◦ 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 select the protocol version to be used. By default, the selected protocol is 2.5.1.

• Deployment Preferences

> 📝 Note
>
> Depending on the selected server type, some of the settings displayed in this section will vary. The options that will remain unchanged no matter the server type are:
>
> ◦ **Server weight**
>
> ◦ **Notes**

◦ Server weight - 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, 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.

The server score is computed using the following formulas:

1. (load) L = used_account_type/max_account_type where:

▪ used_account_type represents the number of accounts of a certain type (reseller, client, conference, etc.) currently used on the provisioning server.

- max_account_type represents the maximum number of accounts that the provisioning server can host.

   For example: L = 30/100 = 0.3

2. (score) S = L*Weight*100

◦ 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.

> **Note**
>
> A **VoipNow Professional** provisioning server cannot be added if:
>
> - The currency used in **Automation** is not identical with the server's.
> - Charging is globally disabled on the remote server.
> - The connection key or the administrator's username are no longer valid.
> - The access to SOAP API is disabled for administrator user. For more details on how to enable it please check the **VoipNow Professional User Guide**.
> - The VoipNow Professional version is not 2.5.0 or greater.
> - The `httpd` or the MySQL services no longer run on that server.
> - The SOAP version required by **Automation** does not exist on the provisioning server. Automation checks the ultimate version of the provisioning server and upgrades the connection parameters from Automation to the greatest version supported.
> - The provisioning server cannot be enrolled in **Automation**.

Click Ok to set up the provisioning server. Click Cancel to return to the previous page without setting up the new provisioning server.

Edit a Provisioning Server

If you want to edit the details of a provisioning server, follow these steps:

1. In the Provisioning Servers Management page select from the list the server you want to modify and click on its hostname/IP.
2. The Edit a Provisioning Server page is displayed, allowing you to change the information about the previously selected server.

> **Note**
>
> On this page you can modify the server type, server connection details and the deployment preferences. For more details on how to modify these fields, see the [Add a Provisioning Server](#) section.

Remove a Provisioning Server

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

Chapter 5
Orders Management

> **Note**
>
> Access to the 🗃 Orders area is permitted only:
>
> - To the **Administrator** user.
>
> - If the number of customer accounts is smaller than the maximum number of customer accounts allowed by the user's license.

After a customer finalizes a purchase from the online store, the corresponding order is listed in the 🗃 Orders section of VoipNow Automation. The order contains all the purchase details (information about the customer, the item(s), the invoice(s) etc.). Once it is processed, the items are ready to be deployed. You, as the system administrator, have the possibility to manage all the orders placed on the online store and to manually add new ones directly from the interface, if required.

The Orders Management page allows you to:

- View the Latest Orders placed both in the online store and manually, from the VoipNow Automation interface.

  > **Note**
  >
  > The orders are listed in the received order, with the newest ones on top.

- Manually add a new order by clicking the 🪙 <u>Add order</u> icon available in the Tools section.

  > **Note**
  >
  > You can manually add an order if:
  >
  > - The logged in user has **Administrator** role.
  > - The number of customer accounts is smaller than the maximum number of customer accounts allowed by the user's license.
  > - There is at least one active customer account in **Automation**.
  > - There is at least one item configured in **Automation**.
  > - The payment methods have been set in the 🧩 <u>Setup</u> >> **Behaviour** section.
  >
  > When you cannot manually add an order, the 🪙 icon is displayed instead.

- Search the orders list using the available advanced controls.
- View an order's details.
- View/edit a customer's personal information.
- View/edit a customer's billing information.
- Process the existing orders by performing various operations, depending on their current status.

  VoipNow Automation displays the following information about each order:

- Order No - The order number.

  Click the chosen order number if you want to view/edit the billing information or the notes. For more details, check the <u>Order Overview</u> section.
- Customer account - The complete name of the customer account's owner who placed the order.

  Click the chosen customer account name if you want to view/edit its information. For more details, check the <u>Edit a Customer Account</u> section.
- Items - The number of items commanded by the customer and included in the order.

- Received - The date and time the order was received.

- Invoices - This column displays the total number of invoices issued for a particular order, as well as the number of due/overdue invoices. If one of the invoices is overdue, than the entire row is displayed in red, showing that the payment date has passed.

> **Note**
>
> If the purchased item requires a recurrent subscription, an invoice will be created for each period. For example, if the customer account's owner must pay a monthly fee, than an invoice will be generated each month.

> **Note**
>
> The information is displayed in the following standard format:
>
> {x} Total: {y} Due | {z} Overdue
>
> Clicking the {x} Total link will open:
>
> > For more details, check the Invoice Overview section.
>
> - The **Invoices for Order {order_no}** page - If more than one invoice have been issued for that order.
>
>   For more details, check the Invoices chapter.
>
> - The **Invoice Number {invoice_no}** - If only one invoice has been issued for that order.
>
> Clicking the {y} Due link will open the same pages as above, displaying only the invoices whose payment date has not passed.
>
> If you want to see the overdue invoice(s), click the {z} Overdue link. Depending on the number of invoices, one of the pages described above will be opened.

- Status - This column displays the order's status using the following standard format:

  {current_status} ({next_status} in progress...)

> **Note**
>
> The **({next_status} in progress...)** part is displayed only when the order is in transition from one status to another.

The following statuses may be displayed:

- New - The order has just been placed and has not been scheduled for fulfillment yet.

- New (Scheduled for Fulfillment) - The new order has been scheduled for fulfillment and all its items have been enqueued for deployment.

- New (Fulfillment failed) - None of the new order's items has been successfully deployed and no item is enqueued for deployment.

- Fulfilled - All the items ordered by the customer have been successfully deployed.

- Partially fulfilled: {x} Total/ {y} Deployed - This status is displayed when only {y} items from the total {x} have been successfully deployed. The undeployed items are not enqueued for deployment.

  Clicking the {x} Total link will open the Services Contained in Order Number {order_no} page that displays all the order's items, while clicking the {y} Deployed link will open the same page, this time displaying only the items that have been successfully deployed on the provisioning servers.

- Partially fulfilled: {x} Total/ {y} Pending - This status is displayed when not all the items ordered by the customer have been successfully deployed. From the total {x} items, {y} remained undeployed and are now enqueued for deployment.

  Clicking the {x} Total link will open the Services Contained in Order Number {order_no} page that displays all the order's items, while clicking the {y} Pending link will open the same page, this time displaying only the undeployed items, that are now in the Pending status, enqueued for deployment.

- Fulfilled (Termination failed) - None of the order's items have been terminated from the deployment server and no item is enqueued for termination.

- Canceled - The order has been canceled due to non-legal considerations, for example the user has changed his mind and does not want to purse with the order.

- Rejected - The order has been rejected due to legal considerations, for example the customer that placed it has known payment problems (he failed to pay for some items in the past) and you do not want to do business with him anymore.

- Terminated - The order and all the items associated to it have been successfully terminated.

◦ Partially terminated: {x} Total/ {y} Terminated - This status is displayed when only {y} items from the total {x} have been successfully terminated. The items that still are in the Active or Suspended status are not enqueued for termination.

Clicking the {x} Total link will open the Services Contained in Order Number {order_no} page that displays all the order's items, while clicking the {y} Terminated link will open the same page, this time displaying only the items that have been successfully terminated from the provisioning servers.

◦ Partially terminated: {x} Total/ {y} Pending - This status is displayed when not all the items ordered by the customer have been successfully terminated. From the total {x} items, {y} could not be terminated and are now enqueued for termination.

Clicking the {x} Total link will open the Services Contained in Order Number {order_no} page that displays all the order's items, while clicking the {y} Pending link will open the same page, this time displaying only the items that still have to be terminated and that are now in the Active or Suspended status.

◦ Fraudulent - The order is considered fraud.

If a transition between two different states is still in progress, than it will be displayed between parentheses, as follows:

◦ (Scheduled for Fulfillment) - The items are scheduled for deployment and the operation is ongoing.

◦ (Fulfillment failed) - The order fulfillment has failed. No item has been deployed and there are no items enqueued for deployment.

◦ (Scheduled for Termination) - The items are scheduled for termination and the operation is ongoing.

• Operation - Clicking the Choose link you can perform actions which will lead to changes in the order's status. The possible actions, depending on the order's status, are:

◦ If the status is set to:

▪ New

▪ New (Scheduled for Fulfillment)

▪ New (Fulfillment failed)

then the following actions are available:

▪ `Fulfill now` - If you choose to fulfill an order, then all the items associated with that order and which have not been deployed yet

are scheduled for deployment. This option is available only for active customer accounts or paid orders. When you are not allowed to click this field, a context help is displayed explaining the reason.

⚠ Caution

If a customer manually **Cancels activation** for all the items included in an order, then the order cannot be scheduled for fulfillment!

📒 Note

A paid and refunded order is not considered paid!

The order status is influenced only by the success or failure of master standalone deployments or add-on deployments which represent a store item by themselves. An order can be fulfilled for a bundle product for which only the master deployment could be deployed successfully on a provisioning server.

- `Reject order` - Click to reject the order. The decision is based on legal considerations. The uncaptured payments are going to be voided. All the items are going to be removed from the processing queue. A new invoice will be issued for the captured payments in order to reimburse the buyer.

   You will have to confirm the operation by selecting the available check box and by clicking the 🖫 Confirm icon.

- `Cancel order` - Click to cancel the order. The decision is based on non-legal considerations. The payments that have not been captured are going to be voided. All the items are going to be removed from the processing queue. A new invoice will be issued for the captured payments in order to reimburse the buyer.

   You will have to confirm the operation by selecting the available check box and by clicking the 🖫 Confirm icon.

- ` Report fraud` - Click if you want to report an order as fraudulent. The payments that have not been captured are going to be voided. All the items are going to be removed from the processing queue. A new invoice will be issued for the captured payments in order to reimburse the buyer.

   You will have to confirm the operation by selecting the available check box and by clicking the 🖫 Confirm icon.

◦ If the status is set to Partially fulfilled:

- `Retry fulfillment` - Click to retry the deployment of all the items that could not be previously deployed. This option is available only for active customer accounts and paid invoices.

- `Terminate order` - If you choose to terminate an order, the deployed items are enqueued for termination and the undeployed ones are canceled.

> **Note**
>
> This actions are available no matter if there are or if there aren't any items enqueued for deployment.

○ If the status is set to Fulfilled:

- `Terminate order` - If you choose to terminate an order, the deployed items are enqueued for termination and the undeployed ones are canceled.

○ If the status is set to Canceled:

- `Reverse cancel operation` - The reverse operation is going to set the order status back to New. A new invoice is issued to the customer account.

○ If the status is set to Rejected:

- `Reverse reject operation` - The reverse operation is going to set the order status back to New. A new invoice is issued to the customer account.

○ If the status is set to Partially terminated:

- `Terminate order` - If not all the order's items scheduled for termination could be destroyed, click this option to retry to terminate all the order's items.

  You will have to confirm the operation by selecting the available check box and by clicking the 🖫 Confirm icon.

- `Report fraud` - Click if you want to report an order as fraudulent. This option is available when all the items are terminated and undeployed. The payments that have not been captured are going to be voided. A new invoice will be issued for the captured payments in order to reimburse the buyer.

  You will have to confirm the operation by selecting the available check box and by clicking the 🖫 Confirm icon.

> **Note**
>
> An order cannot be reported as fraudulent as long as there are still items associated to it that are scheduled for deployment and that have not been yet destroyed .

- ◦ If the status is set to Terminated:

  - ▪ `Report fraud` - Click if you want to report an order as fraudulent. This option is available when all the items are terminated and undeployed. The payments that have not been captured are going to be voided. A new invoice will be issued for the captured payments in order to reimburse the buyer.

    You will have to confirm the operation by selecting the available check box and by clicking the 📄 Confirm icon.

    > **Note**
    >
    > An order cannot be reported as fraudulent as long as there are still items associated to it that are scheduled for deployment and that have not been yet destroyed.

- ◦ The Fraudulent status is a final state.

Searching the Orders List

When you are searching for specific orders, you can use one or more of the available filters:

Show orders received between {start_date} and {end_date} with order number {order_no} for customer account {customer_account} and item {item} with status {status}

where:

- {start_date} - Use the available text box or the 📅 calendar button to specify the lower limit of the time interval in which you want to search for particular orders. The default value is {start_date} minus 15 days. The date format must be `yyyy-mm-dd`.

- {end_date} - Use the available text box or the 📅 calendar button to specify the upper limit of the time interval in which you want to search for particular

orders. The default value is the current date. The date format must be `yyyy-mm-dd`.

- `{order_no}` - Use the available text box to specify the number of the order you are looking for.

- `{customer_account}` - Use the available text box to specify the name of the customer account whose orders you are looking for.

- `{item}` - Use the available text box to specify the item SKU if you want to search for all the orders made for a particular item. The SKU can be found in the Items Management page.

- `{status}` - Use the drop-down list to select the status of the order. The available options are:

  - `New`

  - `Fulfilled` - This includes the `Partially fulfilled` orders.

  - `Rejected`

  - `Canceled`

  - `Terminated` - This includes the `Partially terminated` orders.

  - `Fraudulent`

Add a New Order

> **Note**
>
> You can manually add an order if:
>
> - The logged in user has **Administrator** role.
> - The number of customer accounts is smaller than the maximum number of customer accounts allowed by the user's license.
> - There is at least one active customer account in **Automation**.
> - There is at least one item configured in **Automation**.
> - The payment methods have been set in the 🧩 Setup >> **Behaviour** section.

VoipNow Automation allows you, as a system administrator, to place two different order types that are used for two distinct purposes:

1. Add a new order for a certain customer

   Follow this link if you want to add a normal order.

2. [Add a new add-on for an existing, replicated item](#)
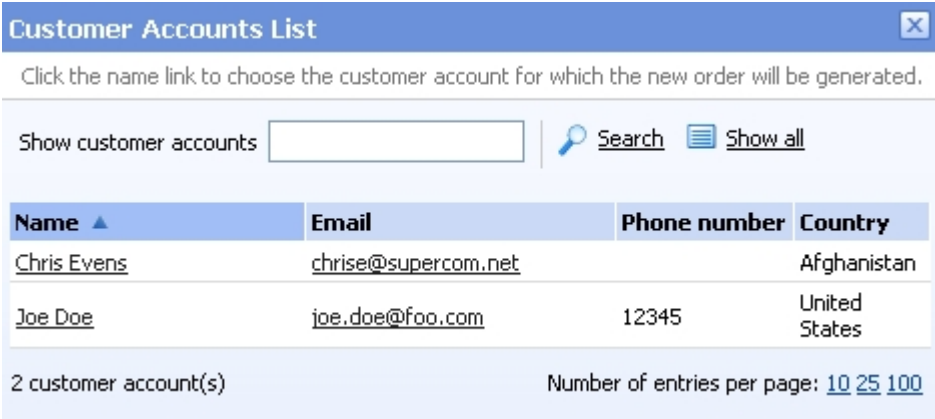
Follow this link if you are adding an add-on for one of the replicated items.

Both orders can be created using similar tools, but it is very important to understand their completely different purpose. The normal orders are used to simply command certain items for one of the available customers, while the add-ons are specific items that are used to extend or to change certain permissions and limits for existing, already ordered and replicated items like reseller and client accounts.

Add a New Standard Order

When you want to order certain items for one of the existing customer accounts, you have to follow the next steps:

1. Use the controls available in the Customer Account Information fieldset to select the customer for whom you want to place the order and his billing details:

   - Customer account - Click the 👤 [Choose customer account](#) link to select the account for which the new order will be placed.

The pop-up panel used to select the customer account

   The Customer Accounts List pop-up panel provides the following information:

   - Name - The customer account's name. Click the name link to select it.

   - Email - The contact email address specified for the customer account. Click this link to send an email message to the selected account owner.

   - Phone Number - The contact telephone number specified for the customer account.

◦ Country - The country specified for the customer account.

If you are searching for a particular customer account, you can use the available controls.

> **Note**
>
> The selected customer account's name will be displayed in a text box. If you want to select a different customer account, click the 👤 Change customer account link.
>
> **Customer Account Information**
>
> Customer account * | Joe Doe , joe.doe@foo.com | 👤 Change customer account

> ⚠ **Caution**
>
> When you select a certain customer account, only his payment details will be available in **Billing address** drop-down list. Each time you change the customer account, the payment details are changed as well.

- Billing address - Use the drop-down list to select the billing address that will be used for charging the chosen customer account. The details are given in the following format: complete customer name, city, zip code (e.g.: John Smith, New York, 123456).

  This field is active only if you have previously selected a customer account.

  > **Note**
  >
  > When the billing address is changed, the shopping cart is updated to match the newly entered information, for example:
  >
  > ◦ If the existing tax has been changed, then the new tax is displayed.
  >
  > ◦ If the existing tax has been removed, then no tax is displayed.
  >
  > ◦ If there was no tax and one was added, then the newly added one is displayed.

2. Next, you must choose the items to be purchased by adding them to the cart available in the Add Item to Order fieldset:

   - Items in cart - Click the cart box to add the desired items to the shopping cart from the Items List pop-up panel.

Items List

Click the name link to add the item to the shopping cart.

Show items with SKU [   ] in category [-- ▼] 🔍 Search ☰ Show all

Item	SKU ▼	Charge
Prepaid Reseller Account	PRA	10.00 USD / 11.00 USD monthly
Prepaid Extension	PE	2.00 USD / 3.00 USD monthly
No Permissions Reseller Account	NPRA	0.00 USD / 0.00 USD monthly
Full Reseller Account	FRA	3.00 USD / 4.00 USD monthly

4 item(s)   Number of entries per page: 10 25 100

The pop-up panel used to select the items(s) to be added to the order

The following information is available:

◦ Item - The item's descriptive name in the store's default language. Click the corresponding link to select an item.

> **Note**
>
> An order can contain more than one similar item. You can add several items of the same type by repeating the process for how many times it is required.

◦ SKU - The item's SKU (Stock Keeping Unit). This is an unique identifier for each distinct item that can be purchased from the online store.

◦ Charge - The item's costs in the following format:

`{charge_for_setup}         {currency}/{charge_for_account} {currency} {charging_interval}`

Example: `175,00 USD/75,00 USD monthly`. The customer will be charged `175 USD` as an one time fee and other `75 USD` on a `monthly` basis.

> **Note**
>
> An item that was added to an order is displayed both in the **Order Summary** and in the shopping cart.

After adding all the desired items to the cart, you can remove one of them by clicking the ✖ icon available next to the item's name.

Add Item to Order

Items in cart *

> ✖ **Prepaid Reseller Account (Add add-on)**
> Prepaid Reseller Account
>
> ✖ **Full Reseller Account (Add add-on)**
> Full Reseller Account
>
> ✖ **Prepaid Extension (Add add-on)**
> Prepaid Extension
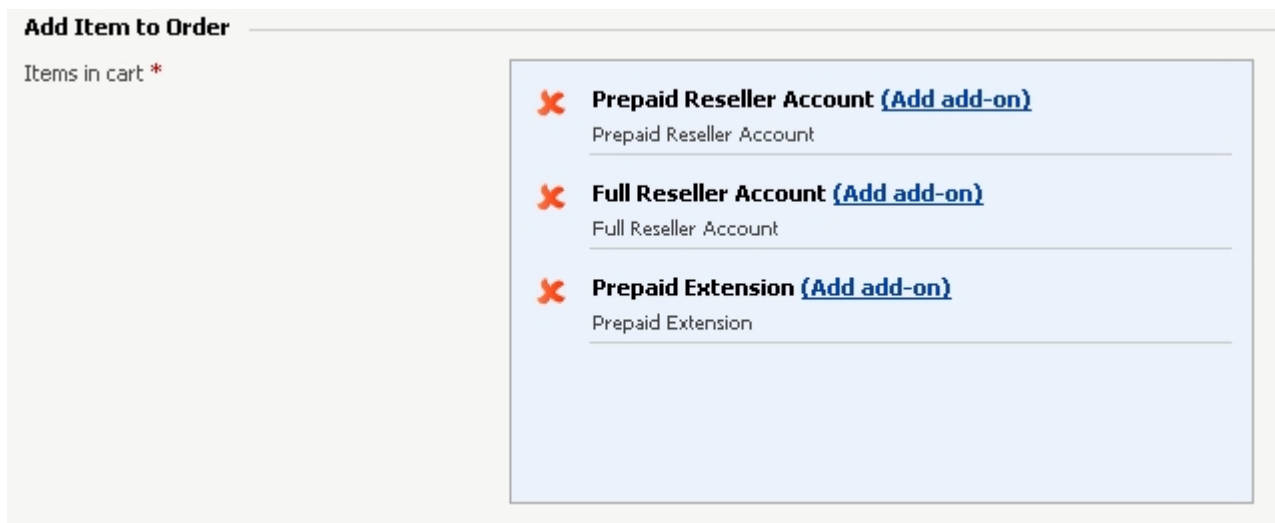
The shopping cart

The (Add add-on) feature, displayed next to every standalone item from
the shopping cart, allows you to simply supplement the item's limits,
permissions or credit by adding a specific add-on. To do this, simply
click the link and choose the desired add-ons from the Items List pop-up
panel. The shopping cart will be updated accordingly. More information
about how to add an add-on can be found here .

> ✖ **Prepaid Reseller Account (Add add-on)**
> Prepaid Reseller Account
> [1 ▼] **reseller_limits**
>   reseller_limits
>
> ✖ **Full Reseller Account (Add add-on)**
> Full Reseller Account
>
> ✖ **Prepaid Extension (Add add-on)**
> Prepaid Extension

The shopping cart after adding an add-on

3. After deciding what items should be placed in the current order, you have
   to select the Payment Method that will be used to charge the customer
   account:

   • Currency - Use the drop-down list to select the currency that will be
     used for this order. The list displays all the payment currencies available
     in the online store that have been previously set up from the 🐸 Setup >>
     Currency exchange   page.

> **Note**
>
> When the currency is changed, the **Order Summary** is updated with the items' prices in the respective currency, using the latest exchange rate .

- Payment method - Use the radio buttons to select the method you want to use for paying this order. Only the methods selected from the Setup >> Behaviour >> Payment Preferences page are displayed. The available options are:

  - customer will process payment - The invoice is generated for this order, but no payment is performed. The customer will be able to pay the invoice from the online store or from Automation later. This option is checked by default.

    > **Note**
    >
    > The **Invoices autopayment scheduled task** DOES NOT include the invoices with this option enabled. The customer will NOT be charged!

  - wire payment - The payment was previously made through wire. A new section, Payment Details, is expanded, allowing you to fill in the extra information about the payment:

    - Document number - Use the available text box to fill in the number of the document used to transfer the money to your account.

    - Transaction date - The date the transaction was initialized. The accepted format is `yyyy-mm-dd`.

    > **Note**
    >
    > This option is not displayed if you did not mentioned the chosen currency as one of the accepted currencies when you have set up the payment plug-in .

  - check payment - The payment was previously made through check. A new section, Payment Details, is expanded, allowing you to fill in the extra information about the payment:

    - Document number - Use the available text box to fill in the number of the check used to transfer the money to your account.

    - Transaction date - The date the transaction was initialized. The accepted format is `yyyy-mm-dd`.

> **Note**
>
> This option is not displayed if you did not mentioned the chosen currency as one of the accepted currencies when you have set up the [payment plug-in](#) .

◦ credit card payment - This method allows the payment to be made using the customer's credit card. This option is not displayed if there is no credit card currently set up or if the customer's card does not support the currency used on the online store because his credit card details are needed to complete the payment. Also, in order to use this method, the Automatic payment check box must be selected from the [Setup](#) >> Behaviour >> Payment Preferences tab. A new section, Payment Details, is expanded, allowing you to fill in the extra information about the payment:

▪ Existing card - Use the drop-down list to select one of the customer's credit cards. The last four digits of the credit card number and the credit card's expiration date will be displayed. The credit card details provided for the chosen subscription will be used for the payment of the current order.

> **Note**
>
> This field is not displayed if there is no available subscription for the chosen customer with this credit card processor or the credit card processor does not support the currency previously chosen.

◦ PayPal Billing Agreement - This method allows the vendor to automatically charge the customer's PayPal account using an existing billing agreement. A new section, Payment Details, is expanded, allowing you to fill in the extra information about the payment:

▪ Existing billing agreement - Use the drop-down list to select one of the billing agreements available for the selected billing address.

The displayed values are the billing agreements IDs available for the selected customer account.

> **Note**
>
> This field is not displayed if there is no available billing agreement or if the existing agreement does not support the currency previously chosen.

> **Note**
>
> When the payment method is changed, the **Order Summary** is updated accordingly.

The Order summary box is a specially designed area that displays the order overview. It always remains on top of the page on scroll down and it can be minimized/maximized by clicking the » « icons. The following information is available, if there is at least one item in the 🛒 shopping cart:

```
{ordered_quantity} x {item_name}
{recurring_fee} {currency} / {recurrence_interval} + {setup_fee} {currency}
```

Where:

- {ordered_quantity} - The quantity ordered from a certain item.
- {item_name} - The ordered item.
- {recurring_fee} - The fee that has to be paid every {recurrence_interval}.
- {recurrence_interval} - The time interval the fee is applied to (e.g.: monthly, yearly).
- {setup_fee} - The amount charged only once for setting up the item.
- {currency} - The VoipNow Automation default currency. For more information, check this section.

After all items in the cart are displayed, the order total is calculated:

```
Subtotal: {subtotal} {currency}
Taxes ({x%}): {tax} {currency}
Total: {total} {currency}
```

Where:

- {subtotal} - The total value of the ordered items, before taxes, in the system currency.
- {x%} - The value of the taxes applied to the items, in percents. The value is displayed in the the system currency.
- {total} - The total amount of the order that will have to be paid by the customer, in the system currency.

The Order Summary for a standard order

> **Note**
>
> When add-ons are added directly in the order, they are displayed as well in the **Order Summary**:
>
>
>
> **The Order Summary for an order that includes an add-on added to the first item**

Add New Order for Add-ons

In order to add an add-on to the previously chosen master deployment, you must use the controls available in the Add New Add-on for {item} page:

1. The Customers Account Information fieldset displays the identification parameters of the customer account for whose standalone item the add-on will be added:

- Customer account - The customer account that will be charged for the add-on(s) included in this order.
- Billing address - The customer's billing address that was used for charging the customer. If more than one address is available, then you may change the currently in use one to one of your choice.

2. Next, you must choose the add-ons to be purchased by adding them to the cart available in the Add Add-on to Order fieldset:

- Items in cart - Click the cart box to add the desired add-ons to the shopping cart from the Items List pop-up panel.

> **Note**
>
> Only the add-ons that are compatible with the selected item are displayed!

The shopping cart for add-ons

To increase/decrease the number of identical add-ons from the order, use the drop-down list displayed in front of the add-on.

3. After deciding on the add-ons that should be placed in the current order, you have to select the Payment Method that will be used to charge the customer account. The available controls are described here .

Order Overview

The Order Number {order_no} page displays in five sections all the details available about the current order:

- Order Information

Order Information

VoipNow Automation displays the following information about the order:

- Order number - The number of the current order.

> **Note**
>
> To add a note, click the No Comments link to go to the bottom of the page and enter your remark in the corresponding text box.

- Received - The date and time when the order was received. The time zone is also displayed.
- Status - This cell is split into two parts:
  - The first part displays the order's current status.
  - The second part displays the Operations link followed by the History link.

    Clicking the Operations link will open a pop-up window that allows you to change the order's status. For more details, see the Orders chapter.

    Clicking the History link will open a pop-up window displaying all the changes suffered by the order's status, including the date and the person that scheduled the changes.

- Placed from - The location from which the order was placed, either from the website, or directly from the Automation interface. If the order was placed from the website, a link is provided to the public store homepage.
- Amount - The total value of the purchase. It is computed automatically and it is equal with the sum of all the items plus tax.
- Customer IP - The IP from which the customer has placed the order. The customer's city and country can also be displayed using GeoIP CityLite. When the country IP where the order was placed is different from the customer country or to the billing country, a fraud alert will be triggered.
- Invoices - This column displays the total number of invoices as well as the number of due/overdue invoices. The overdue invoices are displayed in red, showing that the payment date has passed.

If the purchased item requires a recurrent subscription, an invoice will be created for each period. For example, if the customer must pay a monthly fee, than an invoice will be generated each month.

Click the total number of invoices to go to the chosen customer's Invoices management page. For more details, check the Invoices chapter.

Customer Information

This section displays the details available in the system for the customer who has placed the order. The information can be edited as described in the Add a New Customer Account section.

In order to save the modifications, click the 🖫 Save link.

> **Note**
>
> All the changes made in this section are recorded for the customer account and will be applied in his next orders.

Billing Information

This section displays the billing information about the customer who has placed the order. The information can be edited as described in the Add a New Customer Account section.

In order to save the modifications, click the 🖫 Save link.

If the customer has more than one billing addresses defined, you can change the one used for this order following the next steps:

1. Click the 🖫 Query database link. A pop-up window containing a standard block for each billing address available for that customer is displayed. For each block, the following information is shown:
   - Name
   - Company
   - Street address
   - Phone number
   - Fax
   - Email

2. Select the billing address you want to use by clicking the corresponding block.

> **Note**
>
> All the changes made in this section are recorded for the customer account and will be applied to his next orders.

Order Items

VoipNow Automation displays the following information about each item contained in the order:

- Status - The service's current status is displayed using an icon:
  - ◦ 🟨 Pending
  - ◦ 🟩 Active
  - ◦ 🟧 Suspended
  - ◦ ⬜ Canceled
  - ◦ ❌ Terminated
- SKU - The item's SKU (Stock Keeping Unit). This is an unique identifier for each distinct item that can be purchased from the online store.
- Item name - The item's presentation name in the default language, as it is displayed in the online store accompanied by the item type and master item name for add-ons.
- Deployment (Total/Deployed) - This column displays a message when the service deployment has been performed, otherwise it displays '-'. The standard message form is: `On server {hostname} at {date} with ID {#XXXX}`, where:
  - ◦ `{hostname}` - The name of the server where the service has been deployed.
  - ◦ `{date}` - The date when the deployment took place.
  - ◦ `{#XXXX}` - The deployment's ID is a link. On click, you will be redirected to the Accounts Deployment Management page, where you will be able to see the deployment log of the chosen item.

  Also, if you click the (Total/Deployed) link, you will be redirected to the same Accounts Deployment Management page.
- Price {currency} - The retail item price in the default currency.

- The last table line computes the order's total amount:
  - Subtotal - The sum of all the items' prices, before tax.
  - Tax (percent) - The tax level as it was set in the customer account's billing details or in the Setup >> Taxes section. The amount is computed as the specified percent from the Subtotal.

  > **Note**
  >
  > If there is no tax level defined in the customer account's billing details, but there is a global tax specific to the region or country the customer is from, set in the Setup >> **Taxes** section, than this tax will be used here.

  - Total - The total amount paid by the customer account's owner.

Add-on items linked to master items in the same order are indented below the master item.

Order notes

In this section you can add your comments regarding the current order. To add a note click the text box and start typing. To save the information you have entered, click Add link.

Chapter 6
Invoices Management

> **Note**
>
> Access to the 🗐 Invoices area is permitted:
>
> - To the **Administrator** user.
> - If the number of customer accounts is smaller than the maximum number of customer accounts allowed by the user's license.

An invoice is a commercial document issued by the seller to the customer, indicating all the details of the transaction between the parties. It is a fiscal proof showing that the customer has payment obligations to the seller for the items (s)he has bought. An invoice is generated for every order placed on the online store or directly in VoipNow Automation, as well as for all the other actions which imply money transactions. For every transaction that takes place between a gateway and a payment plug-in, a payment log is generated to keep a record of the details of that particular transaction.

View the Invoices List

In order to view the list of all the invoices in the system, click the Invoices link available in the left navigation panel. This will open the Invoices Management page.

Multiple operations can be performed:

- Search the list of invoices using specific criteria.

- View the details of an invoice.

- View the payment log(s) for a transaction.

- View/edit a customer account's owner billing information.

- Perform various operations on invoices, depending on their current status.

VoipNow Automation displays the following information about each invoice:

- T - This icon displays the invoice type:

  ◦ Purchase (new) - This is an invoice issued for all the new orders placed by the customers on the online store.

  ◦ Purchase (recurrent) - This is an invoice issued for the orders that require recurrent payments to be made at specific time intervals.

  > **Note**
  >
  > When a customer purchases an item, an invoice is generated for the setup fee and for the amount that has to be paid for the first charging interval. If the service remains undeployed for a certain period of time, after its deployment, no recurrent invoice will be generated for the interval the customer did not used the ordered service. The first recurring invoice generated after the deployment is made will take account the first anniversary fee paid for the service and charge for it only after the anniversary period of time is exceeded.

- ◦ 📑 Refund - This is an invoice issued when a previously paid invoice is refunded to the customer.
- ◦ 📄 Void - This is a voided invoice.

- Invoice no. - The invoice number.

  Click the link if you want to see the invoice details as they are stored in VoipNow Automation. For more details, see the Invoice Overview section.

  Click the 🔵 icon to display the public invoice, the same that is seen by the customer account's owner. The invoice will be opened in a new browser window.

- Amount - The total amount of the invoice, with taxes. The currency is the one defined in the 🧩 Setup >> Behaviour >> General tab.

- Issued - The date when the invoice was issued.

- Due - The date until the invoice must be paid. For an unpaid invoice, the entire row is displayed in different colors depending on the number of days remaining until the limit date::
  - ◦ Green - 2-5 days until the due date.
  - ◦ Yellow - 0-2 days until the due date.
  - ◦ Red - The invoice is overdue.

  > 📝 **Note**
  >
  > If the invoice is paid, '-' is displayed.

- Items - The number of items on the invoice.

- Billing customer account - The name of the customer account as it was specified in the billing address used for the invoice currently selected.

  Click the customer account name if you want to view/edit his billing address. For more details, check the Edit the Billing Address section.

- Payment logs - Click the Logs link to view all the relevant records related to the payment process. For more details, check the Payment Logs section.

  > 📝 **Note**
  > If the invoice has not been paid yet, '-' is displayed.

- Payment status - The invoice's payment status. It depends on the invoice type:
  - ◦ Purchase (new)
    - ▪ Pending - The invoice has just been issued and it is waiting to be paid.

- `Authorized` - The invoice was authorized using a payment gateway.

- `Captured` - The invoice payment was confirmed and the money are in the vendor's bank account.

○ Purchase (recurrent)

- `Pending` - The recurrent invoice has just been issued and is waiting to be paid.

- `Authorized` - The recurrent invoice was authorized using a payment gateway.

> **Note**
>
> All the invoices that were paid by check and wire transfer have the `Authorized` status.

> **Note**
>
> When a payment is made using a valid credit card, that have been accepted by the payment gateway, the order amount will be blocked until the payment is captured. For example, if the customer has 1,000 USD on his card and the order amount is 250, the payment processor will block them, allowing the customer to use the other 750 USD.
>
> If the payment is not captured within 45 days, the blocked amount will be released and made available again to the customer.
>
> This payments must be manually `Captured`!

- `Captured` - The recurrent invoice payment was confirmed and the money are now in the vendor's bank account.

> **Note**
>
> The **Automatic recurrent invoices generation** scheduled task issues all the new invoices in the `Pending` status. Afterwards, if the customer has a credit card payment subscription defined in the system and the **Automatic payment** option from the Setup >> **Behaviour** >> **Payment Preferences** tab is enabled, his recurring invoices will be automatically paid using that subscription. The invoice payment status will change to `Captured` .

○ Void

○ Refund

- `Pending` - A refund invoice was issued in a pending state, waiting for the customer to be reimbursed.

- `Refunded` - The refund of an existing captured invoice has reached the customer's bank account. Only one refund is allowed per invoice.

- `Operation` - This column allows you to perform actions that will change the invoice's type or payment status. To do so, click the [Choose](#) link. The possible actions, depending on both the invoice's type and the payment status, are:

  - If the invoice type is set to Purchase (new):

    - and the payment status is Pending:

      - `Pay now (Check payment)` - The invoice payment is made by check. When you click this block, two extra fields are displayed, allowing you to enter the document number and the transaction date in order to validate the payment.

        To save the transaction, click the 🖫 [Save](#) link.

      - `Pay now (Wire transfer)` - The invoice payment is made electronically through wire transfer. When you click this block, two extra fields are displayed, allowing you to enter the document number and the transaction date in order to validate the payment.

        To save the transaction, click the 🖫 [Save](#) link.

        > 📝 **Note**
        >
        > The last two actions have the same functionality: they **authorize** the payment done by the customer account's owner. In consequence, the payment status will change to **Authorized**.

      - `Pay now with subscription (payment_gateway_name)` - The invoice payment is made using an existing credit card number that has been recorded for a previous transaction, when the preferred payment gateway was defined.

        To select this method, click this block. You will be asked to choose one of the existing credit card numbers from the drop-down list. To save the transaction, click the 🖫 [Save](#) link.

        > 📝 **Note**
        >
        > If the payment is made using an existing subscription, this action **captures** the amount. In consequence, the payment status will change to **Captured**. As the payment has been received by the vendor, the services scheduled for deployment may be deployed now.

- `Pay now with {PayPal Billing Agreement)` - The invoice payment will be made using an existing credit card subscription provided for a previous transaction that has the Billing agreement option enabled.

  To select this method, click this block. You will be asked to choose one of the existing billing agreements from the drop-down list. To save the transaction, click the 🖫 Save link.

- `Void invoice` - Clicking this block will cancel the invoice payment. This action does not perform any action on the deployment queue, the services that are already in the queue are going to be processed.

  > **Note**
  >
  > The payment status will change to **Voided**. After the operation is performed, the invoice will be considered unpaid and none of its services will be added to the deployment queue.

  > **Caution**
  >
  > Voiding an invoice issued for a new order will cancel the order as well!

- `Void invoice and terminate services` - Clicking this block will cancel the invoice payment. The services that are scheduled for deployment will be canceled and all the deployed ones will be enqueued for termination.

  > **Note**
  >
  > This action is available ONLY if there are deployed items.

  > **Caution**
  >
  > Voiding an invoice issued for a new order will cancel the order as well!

- and the payment status is Authorized:

  - `Capture` - Click this block if the payment details have been approved by the bank and the vendor has received the money for the invoice issued to the customer account's owner. The services enqueued for deployment may be deployed now.

    > **Note**
    >
    > The payment status will change to **Captured**.

- Void invoice - Click this block to release the money that were blocked in the customer's bank account when the invoice was authorized.

> **Note**
>
> The payment status will change to **Voided**.

> **Caution**
>
> Voiding an invoice issued for a new order will cancel the order as well!

- Void invoice and terminate services - Click this block to release the money that were blocked in the customer's bank account when the invoice was authorized. The services that are scheduled for deployment will be canceled and all the deployed ones will enqueued for termination.

> **Note**
>
> This action is available ONLY if there are deployed items.

> **Caution**
>
> Voiding an invoice issued for a new order will cancel the order as well!

- and the payment status is Captured:
  - Refund - If the payment for the original invoice had been captured and now the vendor wants to refund it to the customer account's owner, click on this block. A new invoice, with the Pending payment status, is issued to pay back the buyer.

> **Note**
>
> You cannot issue more than one refund invoice for the same original invoice.

- and the payment status is Refunded:
  - There is no available action for this status.
- If the invoice type is Purchase (recurrent), the same operations as for the Purchase (new) type are available.
- If the invoice type is set to Refund:

- and the payment status is Pending:

  - `Refund` - Click on this block to pay back the buyer. This operation does not perform any action on the deployment queue, the services that are already in the queue are going to be processed.

    > **Note**
    >
    > This action is allowed only for the number of days specified for the 🧩 <u>Setup</u> >> **Behaviour** >> **Payment Preferences** >> `[selected_credit_card_processor]` >> **Refund in maximum** option.

    > **Note**
    >
    > The payment status will change to **Refunded**.

  - `Refund invoice and terminate services` - The buyer will be paid back the invoice amount. The services that are scheduled for deployment are canceled and all the deployed services are enqueued for termination.

    > **Note**
    >
    > This action is available ONLY if there are deployed items.

- If the invoice type is set to Void:

  - There is no available action for this status.

  > ⚠ **Caution**
  >
  > Voiding an invoice issued for a new order will cancel the order as well!

Edit the Billing Information Used for an Invoice

You can edit the billing information used to charge a customer account's invoice by clicking the name link available in the Billing customer account column.

The Edit the Billing Address for {customer account} page allows you to customize the existing data.

> **Note**
>
> For more details on how to fill in the required details, see the [Billing Information](#) section.

Searching the Invoices List

When you are searching for specific invoices, you can use one or more of the available filters:

Show invoice {number} for customer account {customer_billing_name} and amount between {value_1} and {value_2} issued between {date_1} and {date_2} with type {type} and payment status {status} due between {date_3} and {date_4}, where:

- {number} - Use the available text box to specify the invoice number you are looking for.

- {customer_billing_name} - Use the available text box to specify the customer's billing name whose invoices you are looking for.

- {value_1} and {value_2} - Use the available text boxes to specify the amounts between which you want to perform the search. All the invoices in that interval will be displayed.

- {date_1} - Use the available text box or the 📅 calendar button to specify the date from which you want to search for the issued invoices. The date format must be yyyy-mm-dd.

- {date_2} - Use the available text box or the 📅 calendar button to specify the date until you want to search for the issued invoices. The date format must be yyyy-mm-dd.

- {type} - Use the drop-down list to select the invoice type. The available options are:
  - All invoices
  - Purchase (all)
  - Purchase (new)
  - Purchase (recurrent)
  - Void
  - Refund

- {status} - Use the drop-down list to select the payment status. The available options are:

- ◦ `All`
- ◦ `Authorized`
- ◦ `Captured`
- ◦ `Pending`
- ◦ `Refunded`

> **Note**
> Each invoice type has its own specific payment statuses, as it is described in the [View the Invoices List](#) section.

- `{date_3}` - If you want to search for the invoices due in a certain time interval, use the available text box or the 📅 calendar button to specify the starting date. The default value is the current date minus 3 months. The date format must be `yyyy-mm-dd`.
- `{date_4}` - If you want to search for the invoices due in a certain time interval, use the available text box or the 📅 calendar button to specify the ending date. The default value is the current date plus 15 days. The date format must be `yyyy-mm-dd`.

Invoice Overview

This page allows you to see the invoice details as they are stored in VoipNow Automation .

To access an invoice overview page, follow these steps:

1. Click the 📄 [Invoices](#) link available in the left navigation panel.
2. In the Invoices Management page, choose the desired invoice and click the invoice number link.

> **Note**
> For example, if you want to see the details of invoice [01542](#), just click the [01542](#) link.

The information about the invoice is grouped into several sections:

- Vendor Information - This section displays the vendor's contact details, which can be set up in the 🛠 [Setup](#) >> Behaviour area:
  - ◦ Company - The vendor's company name.

○ Tax account no. - The vendor's tax account number, if available.

> **Note**
>
> This field has an informational function only. It is not used in any transaction and it is not related to the taxes you have previously set up.

○ Address - The vendor's complete address.

○ Phone - The vendor's contact phone number.

○ Fax - The vendor's contact fax number.

○ Email - The vendor's contact email address. Click the link if you want to send an email message to the vendor.

• Customer Account Information This section displays the billing details, as they are displayed in the billing address available in the system for the customer who has placed that order:

○ Name - The customer's complete name.

○ Company - The customer's company name.

○ Tax account no. - The company's tax account number, if available.

○ Address - The customer's complete address.

○ Phone - The customer's contact phone number.

○ Fax - The customer's contact fax number.

○ Email - The contact email address. Click the link if you want to send an email message to the customer.

• Invoice Details - This section displays an invoice overview:

○ Invoice number - The number of the invoice. Click the link to display the public invoice, the same that is seen by the customer account's owner. The invoice will be opened in a new browser window.

> **Note**
>
> By clicking the No Comments link, you are sent to the bottom of the page where you can add in the appropriate text box your own notes regarding the current invoice.

○ Refund for invoice number - The number of the original invoice, for which the refund was initiated.

> **Note**
>
> This line is available only for the **Refund** invoices.

- Status - This cell is split into the following parts:

    - The first part displays the invoice's current status.

    - The second part displays the Operations link. Clicking this link will open a pop-up window that will allow you to change the invoice's status. For more details about this transitions, see the View the Invoices List section.

- Issued - The date and the time when the invoice was generated.

- Payment status - The payment status. For more details about the available combinations, see View the Invoices List section.

- Due - The date and time the invoice is due for. This line is displayed only if the invoice is unpaid.

- Paid - The date and the time when the invoice was paid. This line is displayed only if the invoice is paid.

- Tax (percent) - The tax level as it was set in the customer account's billing details or in the Setup >> Taxes section. This line is displayed only if the tax is greater than zero.

> **Note**
>
> If the invoice is unpaid, depending on the number of days remained until the due date, the color of the entire section changes:
>
> - Green - 2-5 days until the due date.
>
> - Yellow - 0-2 days until the due date.
>
> - Red - The invoice is overdue.

- Invoice Items - This section displays a list of all the items contained by this invoice. VoipNow Automation displays the following information about each item:

    - QTY - The quantity ordered by the customer from a specific item.

    - SKU - The item's SKU (Stock Keeping Unit). This is an unique identifier for each distinct item that can be purchased from the online store.

    - Description - The item's name and charge period.

    - Unit price {currency} - The item's price per unit, in the default currency.

- Total price {currency} - The item's price per quantity, in the default currency.
- The last table line computes the invoice's total amount:
  - Subtotal - The sum of all the items' prices, before tax.
  - Tax (percent) - The tax level as it was set in the customer's billing details or in the 🔧 Setup >> Taxes section. The amount is computed as the specified percent from the Subtotal.

> **Note**
>
> If there is no tax level defined in the customer's billing details, but there is a global tax specific to the region or country the customer account's owner is from, set in the 🔧 Setup >> **Taxes** section, than this tax will be used here.

  - Total - The total amount paid by the customer.

The invoice items list can be sorted by SKU, description and unit price. To do so, click a table header link. A highlighted table header marks the criteria used to sort the table and the arrow indicates how the invoice items list was sorted. The sort direction can be changed by another click on the corresponding header.

- Payment Logs - This table displays a record of the invoice's payment status. For more information, see the Payment Logs section.
- Invoice notes - You can add extra information about the invoice by filling in the available text box. When you are done, click the 📇 Add link. The message will be displayed in a rectangle that shows the date and the name of the person that added it.

The Payment Logs

To access the Payment Logs page, follow these steps:

1. Click the 📇 Invoices link available in the left navigation panel.
2. In the Invoices Management page, choose the desired invoice and click the Logs link.

The Payment Logs page displays a table with the following information:

- Transaction type - The transaction type, which can be:
  - Authorize

- ◦ Capture
- ◦ Refund
- ◦ Void
- Transaction ID - The identification number of this transaction.
- Subscription ID - The identification number of the subscription used for paying this invoice.
- Gateway - The name of the payment plug-in gateway used for making the payment.
- Date - The date and time when the operation took place.
- Amount - The invoice's total value, in the default currency.
- Outcome - The transaction outcome. The possible values are:
  - ◦ Success - Click on this link to see a detailed overview of the transaction attempt, which will be displayed in a pop-up window.

    For more information, see the Transaction Outcome section.
  - ◦ Failed - Click on this link to see a detailed overview of the transaction attempt, which will be displayed in a pop-up window.

    For more information, see the Transaction Outcome section.

Transaction Outcome

This pop-up window displays a detailed overview of the transaction attempt. The information is grouped into two tabs:

- Transaction details
  - ◦ Transaction - The transaction type, which can be:
    - ▪ Authorize
    - ▪ Capture
    - ▪ Refund
    - ▪ Subscription payment
  - ◦ Timestamp - The date and the time when the transaction took place.
  - ◦ Outcome
    - ▪ Success
    - ▪ Failure - Displayed in red.

- Amount {currency} - The transaction's total value, in the default currency.

- Bank reference - This line is displayed only for the `Success` outcome, if it was returned by the engine.

- Error code - This line is displayed only for the `Failure` outcome and it displays the specific code for this error.

- Error - This line is displayed only for the `Failure` outcome and it displays an error description.

> **Note**
>
> This is the same error message the user gets in the online store when there is an **Order failure**.

Here is an example of a successful operation:
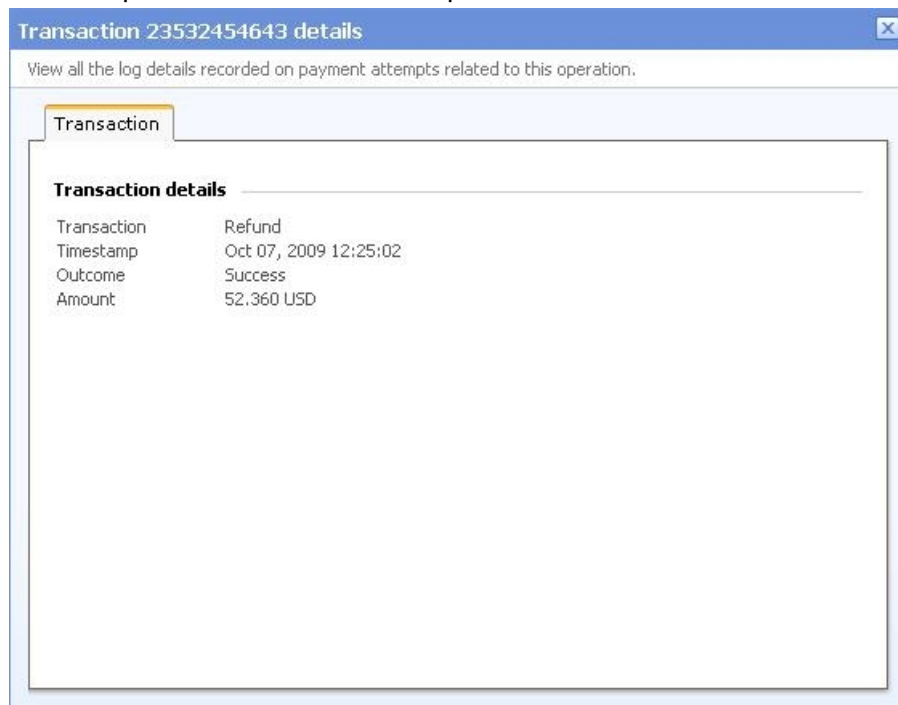
Transaction details pop-up panel

When the operation fails, a message like the following is displayed:
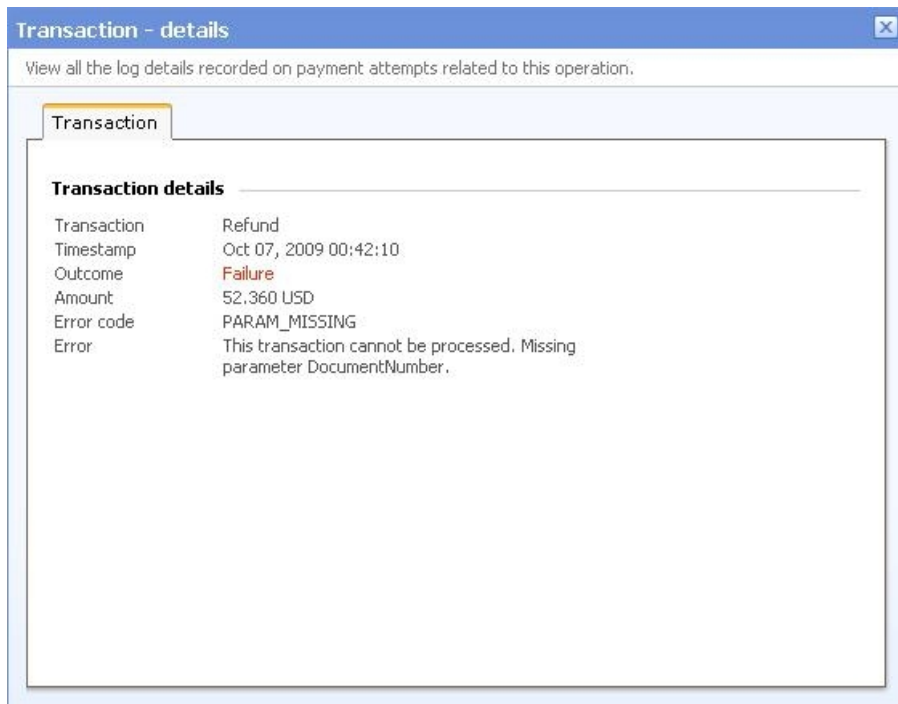
Transaction details pop-up panel

- Request logs - This section is displayed only if the `Log request` option was configured on the payment gateway used for this request.

  ◦ Request - This field displays the request packet.

  ◦ Response - This field displays the response packet.

> **Note**
>
> These fields are read-only.

Here is an example of the request logs:
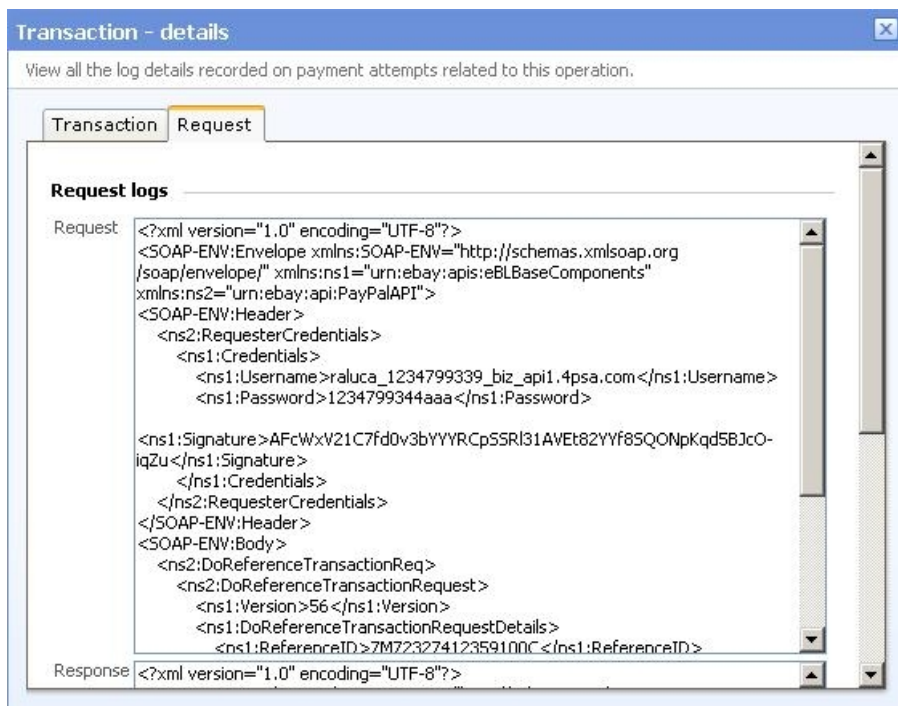
Request logs pop-up panel

Chapter 7
Preferences Management

The Preferences Management page allows you to properly set up the Automation module according to your needs, to define email and system templates, set up taxes and system currencies and manage the cloud building bricks specific to the available platform plug-ins. These settings are grouped into four functional sections:

- System - The system behaviour, the license management and the languages that can be used for customizing the Automation interface can be accessed by clicking the corresponding icon:

    - Behaviour

    - License management

    - Languages

- System templates - This section allows you to manage and customize the system templates:

    - Email templates

    - Display templates

- Payments - This section groups the tools required to manage the taxes applied to the available products and the currencies that will be supported by the application and by the Online Store:

  - 🖩 [Taxes](#)

  - 🪙 [Currencies](#)

- Deployment Platforms - All the resources required by the supported platform plug-ins can be accessed from this section:

  - 📦 [Platform plug-ins](#)

  - 📦 [Platform bricks](#)

Manage System Behaviour

The System Behaviour page allows you to customize the Automation system behavior by configuring its general settings, the billing system functionality, including the online store, the payment preferences and the vendor's contact details.

These preferences are grouped into five sections described in the following sections.

General

This section contains important information about the application's general setup.

- Automation Preferences

  - Automation hostname/IP {IP}:{port} - Use the available text boxes to specify the IP address and the port of the server on which the Automation module is located. By default, the {IP} and {port} text boxes are empty. On focus, they are filled in with the values taken from the current URL. The allowed port values range from 1 to 65,635.

  - Default currency - The charging default currency. It can be changed only until the first transaction is performed in Automation.

    > 📝 Note
    >
    > This currency will be used all across the **Automation** module, as well as in the online store.

> **Note**
>
> Based on the currency set here, the exchange rate for the foreign currencies is computed in the 🧩 Setup >> **Currency exchange** section.

- ◦ Assume default country when not detected - Use the drop-down list to select the country that will be used all across the Automation interface. For example, when the administrator adds a new customer account, its selected default country will be this one.

- ◦ Assume default language - Use the drop-down list to select the language that will be considered the default one for all the new customer accounts that will be added to the system.

- ◦ Default system-wide language - Use the drop-down list to select the language pack that will be used by default in the Automation interface. You may choose between the already installed packs.

  By default, Automation is installed with the `English` language pack.

Click Ok to save your preferences. If you want to return to the previous page without committing the changes, then click Cancel.

Online Store

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

The online store refers to a shopping website that allows customers to purchase the items registered in the Automation module.

- • 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.
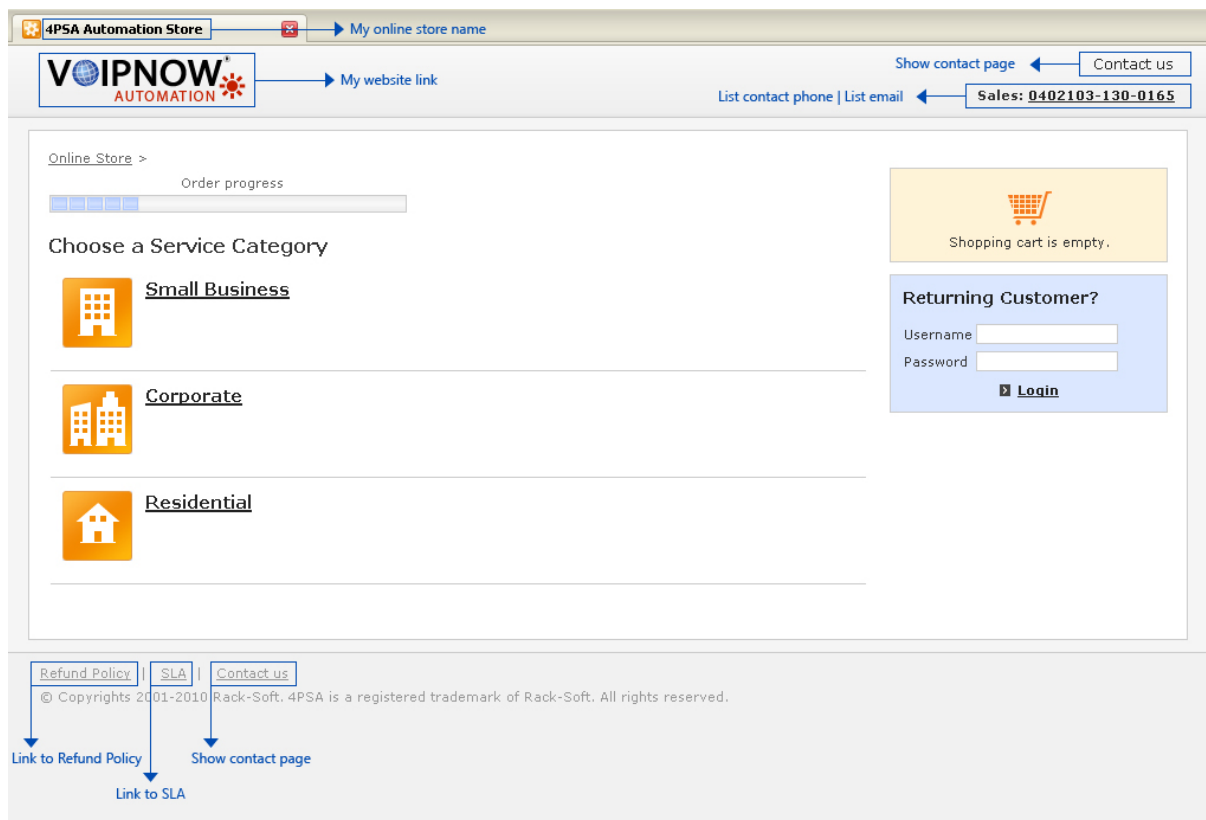
The online store interface

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.

- • **Online Store Languages**

This is a list with all the available presentation languages that can be used for the online store. When the module is first installed, the default language is set to English. It can be later changed to another value.

> **Note**
>
> A language can be set as default if all the store items registered into the system have the presentation in the respective language.

> **Note**
>
> The default language is always displayed with **bold** characters.

VoipNow Automation displays the following information about each language:

- S - The language status:
  - ☑ Enabled
  - ☒ Disabled

  Click this icon to change the language's status.

  > ⚠ Caution
  >
  > **The default language cannot be disabled.**

- Language - The language name.
- Default - This field will display the following text:
  - [Set as default](#) link, available for:
    - Languages that are not already default.
    - Active languages.
    - Languages for which all items have presentations (except for withdrawn items).
    - Languages for which all categories have presentations.

    To set the language as the default one, click the link.
  - Default language
  - [Not allowed](#) if either of these conditions are fulfilled:
    - Not all the items have presentations in that language (except for withdrawn items).
    - Not all categories have presentations in that language.
    - The language is not active.

> ⚠ Caution
>
> **The default language cannot be deleted.**

Click Ok to save your preferences. If you want to return to the previous page without committing the changes, then click Cancel.

Orders and Invoices

> ⚠️ **Caution**
>
> Have in mind that the time zone used by the provisioning servers may be different than the one set up on the **Automation** server! This fact must be taken into consideration when verifying the calculated consumption for a certain time period.

The orders and invoices preferences can be managed from this section.

- Orders

  - Require user to accept the Refund Policy - If this check box is selected, the user is required to accept the Refund Policy when placing an order on 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 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 both enabled, the customer will be required, in the online store, before finalizing an order, 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 this check box is selected, all the new orders for which the payment has been successfully received will be automatically enqueued for fulfillment.

• **Invoices**

◦ **Issue invoices on {day} every month** - Use the drop-down list to select the day of the month the recurring invoice will be issued for all deployed (active and suspended) items. For more information on the recurring invoice generation algorithm please read the [VoipNowAutomation Scheduled Tasks Guide](#) .

◦ **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
```

> **Note**
>
> For purchased bundle store items, only the master deployment is going to be charged for consumption.

◦ Generated invoices are due in {number} days - Use the available text box to specify after how many days since it was issued an invoice is due. The allowed values range from 1 to 180 days. The default value is 5 days. The payment can be done either by the administrator from Automation , either by the user from the online store.

◦ Maximum number of service processing attempts - In case of an operation (activation, suspension, termination) failure, the application will retry to complete the process until the maximum number of attempts is reached. Use the available text box to specify the maximum number of attempts. The allowed values range between 1 and 99. The default value is 3 attempts.

> **Note**
>
> In the **Orders Deployment Management** page, when clicking the failed link, the item instance is rescheduled for deployment and it is placed in the processing queue again.

Click Ok to save your preferences. If you want to return to the previous page without committing the changes, then click Cancel.

Payment Preferences

This tab offers you an overview of the payment methods, allowing you to configure the existing payment plug-ins or to add new ones if necessary.

- Payment Methods

◦ Credit card processor - Use the drop-down list to select the credit card (gateway) payment processor that will be used in the online store. Only one can be selected. The list contains only the enabled plug-ins. If there are no such records, the line will not be displayed. The available plug-ins are:

- ▪ `Authorize.net`
- ▪ `Quantum`
- ▪ `PayPal`
- ▪ `PayPal PayFlow Pro`
- ▪ `CyberSource`
- ▪ `PsiGate`
- ▪ `Realex`

◦ Accept check payments - Select this check box if you want to enable the check payment for the items ordered on the online store.

◦ Accept wire payments - Select this check box if you want to enable the payment made through electronic transfer for the items ordered on the online store.

◦ 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 no payment plug-in is configured.

> **Note**
>
> For the moment, only the `PayPal Billing Agreement` virtual payment processor is available. This method allows the customer to set up a billing agreement later on used by Automation to charge the customer's PayPal account. `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 to charge the customer accounts automatically, based on existing subscriptions.

○ Connection timeout for the credit card processor { value} seconds - Use the available text box to specify the timeout for the connections made by payment gateways. The allowed values range from 0 to 360. The default value is 20 seconds.

○ The maximum number of automatic payment attempts - In case of payment failure, the application will retry to charge the customer account several times, until the number of attempts exceeds this setting. Use the available text box to specify for how many times the application will try to charge the customer . The allowed values range from 1 to 999. The default value is 3 attempts. If a customer does not have a subscription defined in the Automation interface, the application will charge the customer only once and will send him the New pending invoice(s) manual payment notification email.

- Payment Plug-ins - This section displays the list of all the supported payment plug-ins, both configured and not configured, while providing the tools required to set up and to manage them as per your requirements. VoipNow Automation displays the following information about each plug-in:

  ○ S - The plug-in's status:

    ▪ ✅ Enabled

    ▪ ❌ Disabled

    ▪ ☑ Unconfigured plug-ins can not be disabled

> 📝 Note
>
> This icon is displayed for the plug-ins that have not been configured yet.

    ▪ ☒ Unconfigured plug-ins can not be enabled

> 📝 Note
>
> This icon is displayed for the plug-ins that have not been configured yet.

  Click the icon to enable/disable the plug-in. A plug-in can be disabled 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 the 🧩 Setup >> Behaviour >> Payment Preferences tab as one of the accepted payment methods.

    ▪ There are no pending/completed payments registered for that gateway.

  ○ T - The plug-in's type:

- ▪ 🧩 Gateway

- ▪ 🔄 Virtual

- ▪ 🐾 Offline

◦ Name - The plug-in name.

Click the chosen plug-in name to view/edit its details.

> 📝 Note
>
> For the plug-ins that have not been configured yet, this field will display a link to the configuration page: Configure now .

◦ UID - The plug-in unique identifier. If the plug-in cannot be used in the online store, then an exclamation sign is displayed: ❗.

◦ Online store - Click the link to edit the selected plug-in's online store payment fields.

> 📝 Note
>
> For the plug-ins that have not been configured yet, this field displays '-'.

◦ Configured - The date when the plug-in was last modified.

> 📝 Note
>
> For the plug-ins that have not been configured yet, this field displays '-'.

◦ M - Click the Diff link to check the differences between the store payment fields configuration file and the default store payment fields configuration file.

> 📝 Note
>
> For the plug-ins that have not been configured yet or which have not been modified, this field displays '-'.

> 📝 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 🛠 Setup >> **Behaviour** >> **Payment Preferences** tab as one of the accepted payment methods.

- There are no pending/completed payments registered for that gateway.

Click Ok to save the changes. Click Cancel to return to the previous page without modifying anything.

Searching the Payment Plug-ins List

When you are searching for specific plug-ins, you can use one or more of the available filters:

Show {status} plug-in(s) {name} with types {type}

Where:

- {status} - Use the drop-down list to select the search range:
  - Configured - The search will be performed only through the already set up payment plug-ins.
  - Not configured - The search will be performed only through the plug-ins that are not set up yet.
  - All - The search will be performed through both the configured and not configured plug-ins.
- {name} - Use the available text box to specify the plug-in name or its UID.
- {type} - Use the drop-down list to select the plug-in's type.

Configure a Payment Plug-in

The Payment Plug-in page allows you to customize the plug-in's settings using the available controls, grouped into the following fieldsets:

- Plug-in Information
  - Select plug-in - The plug-in UID that cannot be changed as each plug-in type has its own unique ID.
  - Friendly name - Use the available text box to specify the selected plug-in official name. This name is displayed in the online store when an user places an order.

◦ Refund in maximum {number} days - Use the available text box to specify the maximum number of days that the payment gateway allows the captured amount to be refunded to the client. The default value is 30 days.

◦ Log requests - Select this check box if you want the packets exchanged with the payment engine to be logged.

- {plug-in type} Plug-in Configuration - These fields are dynamically populated with the information required by each plug-in type, depending on the payment engine. You will be asked to fill in details like the supported currencies, the keys required to connect to the specific API, the particular endpoints and many others.

For more details on the available configuration settings for the currently selected payment plug-in, see the Configure a Payment Plug-in section.

Edit a Payment Plug-in

To modify the preferences set for the current payment plug-in, use the controls grouped into the following two fieldsets:

- Plug-in Information

- {plug-in type} Plug-in Configuration

For more details on the available configuration settings for the currently selected payment plug-in, see the Configure a Payment Plug-in section.

> **Note**
>
> There is one restriction when editing a configured plug-in: its UID cannot be changed.

Edit the Online Store Payment Fields

VoipNow Automation allows you to modify the payment fields displayed in the online store for each available and configured payment plug-in.

> **Caution**
>
> Make sure you have the appropriate knowledge before beginning to modify the file!

The Edit Online Store Payment Fields for {payment plug-in} provides the required controls:

- Payment Fields

  ◦ Online store payment fields - This line contains the XML code with the payment fields available in the online store for the {payment plug-in}. You can edit the code according to your wish.

  Click Ok to save the changes. Click Cancel to discard all the modifications and return to the previous page. If you want to reverse the preferences to the original XML code, then click Default.

Configuration File Differences

The Differences Between {plug-in_uid} (Default) and {plug-in_uid} (Modified) page displays all the changes suffered by the default store payment fields configuration file.

```
@@ -28,9 +28,9 @@
<fieldvalue langname="11" value="11"/>
<fieldvalue langname="12" value="12"/>
</field>
<field param="CardExpYear" type="select" size="small" required="1" validate_error="au_invalid_cc_date_year" tip="au_cc_expire_tip">
- <fieldvalue langname="2011" value="2011"/>
+
<fieldvalue langname="2012" value="2012"/>
<fieldvalue langname="2013" value="2013"/>
<fieldvalue langname="2014" value="2014"/>
<fieldvalue langname="2015" value="2015"/>
```

The following information is available:

- The lines that were modified, @@ -{line_no} +{line_no} @@, where -{line_no} represents the location of the line(s) that were edited or removed and +{line_no} of those that were edited or added. Both values can be identical if the changes were made inside a line.

  In the pictured example, line @@ -28,9 +28,9 @@ was removed and no other line was removed or added.

- The original content of the modified or removed line is displayed with a - sign in front and on red background.

  In this case, the original syntax was `<fieldvalue langname="2011" value="2011"/>`.

- The new customized content is displayed with a + sign in front and on green background.

  In this case, nothing was added.

Vendor Information

> **Note**
>
> If you access the **Automation** section and the **Online Store** or the **Vendor Information** have not been filled in, a HTML alert telling `VoipNow Automation is not configured. In order to be able to use it, please` set it `up` is displayed, linking you to the **Vendor information** tab. This alert is visible in all the application's pages.

From this tab you can modify the vendor's contact and payment details.

- 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.

Click Ok to save your preferences. If you want to return to the previous page without committing the changes, then click Cancel.

Manage Your License

> **Note**
>
> The **VoipNow Automation** installation offers standard support for one customer account. If you business requires more than one, than you must purchase the proper license.

> **Note**
>
> A VoipNow Professional server can be used for enrollment depending on the license type:
>
> - If the VoipNow Professional license offers **Automation** support, then enrollment is allowed for that server without any further limitations imposed by the **Automation** license.
>
> - If the VoipNow Professionallicense does not include **Automation** support, then enrollment is allowed, but the customer accounts limitations defined in the **Automation** license are imposed.

A specific license key must be purchased in order to be able to use the VoipNow Automation . The entire license management system is independent, allowing the user to choose the solution that suites its needs best.

The license key is generated based on the IP of the server Automation is installed on.

This page displays several details about the license such as the license key, its status or its ownership. You can update your license by uploading a license key file from your computer or by getting one from the license server.

The information is grouped into several sections:

- License Key Status – In this section you can view your server's IP address and your license key's status.

  ◦ Your server IP – This is your server's main IP address. The license key must be issued for this IP, otherwise it will not work.

  ◦ License key status - The status of the currently loaded license key.

- Upload License Key – Use this section to upload a new license key from your computer.

  ◦ License key file - Click the ⬜ button to locate the license key file on your computer. To finalize the activation, click Upload.

- License by Activation Code - Use this section to activate Automation using a specific code.

  ◦ Activation code - Use this text box to fill in the activation code that will be used to extend the license.

- Get license key from the licensing server – Use this form to query the licensing server. This function can only be used when there is a license key loaded on the server. The license key must be uploaded the first time the product is installed.

- Last licensing server answer - This is the answer received when the license server was last queried. Click the Get license button to obtain the answer from the license server.

- License Key Properties – This section provides details about the current license.

  - License vendor - The name of the license vendor, 4PSA . Click the link to be redirected to the company's web page.

  - License key number – The current loaded license key number.

  - License key ownership – The license key type, from the cost perspective. The possible values are:
    - `Evaluation`
    - `Owned`
    - `Leased`

  - License key issued for IP – The IP address the license key was issued for.

  - Maximum number of customers – The maximum number of customer accounts that can be added.

  - License must auto renew before – The date until the license must be auto renewed.

  - License key renewed on – The date when the license key was last renewed.

  - License key expires on - The date the current license key will expire on.

Manage Automation Languages

The independent language packs management allows the administrator to choose the language to be used for the Automation interface. By default, the application is installed with the English language pack.

The Language Management page allows you to:

- View the currently Available Languages.

- Upload a new language pack by clicking the 🦠   Add language   icon available in the Tools section.

- Enable/disable an existing language pack.

- Remove the unused packs.

VoipNow Automation displays the following information about the available language packs:

- S – The language pack's status:
  - ☑ Enabled
  - ☒ Disabled

  Click this icon to enable/disable a certain language pack.

  > **Note**
  >
  > The language pack currently used in the interface cannot be disabled!

- Language pack – The language's 2-letter code (e.g.: `en` for English).
- Language – The language's name in English.
- Version – The language pack version.

> **Note**
>
> The currently in use language pack is displayed using **bold** characters.

> **Note**
>
> The `English` language pack cannot be removed and therefore **Automation** automatically disables its corresponding check box.
>
> Also, you cannot remove language packs currently used by the customer accounts for their interfaces. The corresponding check boxes are also disabled.

Add a New Automation Language Pack

To add a new language pack for the interface, follow the next steps:

1. Set the Path to the language pack file location. You can use either the text box or the ▭ button to manually locate the desired file.

   > **Note**
   >
   > The accepted format for the language pack file is `.tar.gz`.

2. Click Ok to add the new language to the system. Click Cancel to go back to the previous page without adding anything.

Remove a Language Pack

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

Manage the Email Templates

> **Note**
>
> Access to the **Email Template Management** page is permitted:
>
> - To the **Administrator** user.
> - If the number of customer accounts is smaller than the maximum number of customer accounts allowed by the user's license type.

VoipNow Automation can send email notifications to its users when standard events occur. The text of the notifications can be customized and new notifications can be added for any type of event by clicking the Edit link available in the Text column. The system can be also set up to send only some notifications and only to certain users.

> **Note**
>
> The **Email Template Management** page contains all the general email templates used by **Automation** . The templates specific only to the platform plug-ins can be accessed directly from the **Platform Plug-in Management** page.

The system administrator can set the notification preferences for a series of situations displayed in the Event column. The users interested in receiving notifications are:

- The system administrator.
- The customer account's owner.
- Any other person chose by the system administrator.

> **Note**
>
> To enable all the check boxes in a column, click the column's header. For example, if you want to enable all the check boxes in the **Send to customer account owner** column, click the corresponding table header.

The email notifications can be sent, if desired, to customized email addresses by using the controls available in the Send to other addresses column. The addresses can be different for each selected event and can be managed by clicking the ✿ Manage custom emails link specific to the chosen event. A pop-up window will be displayed on screen.

The custom emails pop-up panel

The Manage custom email addresses pop-up window provides the following information about each address:

- S - The address's status:
  - ◦ ☑ Enabled
  - ◦ ☒ Disabled

  Click this icon to change the email address status.
- Email Address - The custom email address.

> 📝 Note
>
> A disabled email address is displayed in gray.

- R - Click the 📛 icon to remove the email address from the list.

To add a new address, fill in the available text box and than click the Add link.

VoipNow Automation provides a set of events that trigger email notifications and that can be customized according to the user's needs. All the available notifications are classified in several sections, depending on their functionality:

- Customer account notification email templates
- Order notification email templates

- Invoice notification email templates
- Error/failure notification email templates

The notifications will be described in detail in the following sections.

Customer Account Notification Email Templates

This category contains the templates required by customer accounts related events like creation, modification and password issues.

The 'New Customer Account Notification' Templates

This notification contains all the details provided for the new customer account created either in the online store, or in Automation . It can be sent to the customer account owner (default), the administrator (default), or to another custom email address.

To access the 'New Customer Account Notification' Templates management page, click the Edit link available in the Text column.

The 'New Customer Account Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 📥 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

Click the link if you want to view/edit the email template. For more information, check the Edit a 'New Customer Account Notification' Email Template section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a 'New Customer Account Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

     > ⚠ **Caution**
     >
     > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ `Text`

       ▪ `HTML`

     ◦ Email subject - Use the available text box to specify the email template title.

> **Note**
>
> When you try to create a new email template, this field is populated with the default subject: **New Customer Account Notification**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

  ▪ [recipient_name] - It will be replaced with the name of the person receiving the notification.

  ▪ [login] - It will be replaced with the username specified for the customer account.

  ▪ [password] - It will be replaced with the password associated to the customer account.

  ▪ [company_name] - It will be replaced with the company name specified for the customer account, if this information had been filled in.

  ▪ [contact_name] - It will be replaced with the name of the contact person specified for the customer account.

  ▪ [phone] - It will be replaced with the phone number specified for the customer account, if this information had been filled in.

  ▪ [fax] - It will be replaced with the fax number specified for the customer account, if this information had been filled in.

  ▪ [address] - It will be replaced with the contact address specified for the customer account, if this information had been filled in.

  ▪ [email] - It will be replaced with the contact email address specified for the customer account, if this information had been filled in.

  ▪ [city] - It will be replaced with the city specified for the customer account, if this information had been filled in.

  ▪ [state] - It will be replaced with the state specified for the customer account, if this information had been filled in.

  ▪ [country] - It will be replaced with the country specified for the customer account.

  ▪ [zip] - It will be replaced with the postal code specified for the customer account, if this information had been filled in.

  ▪ [notes] - It will be replaced with the notes specified for the customer account, if this information had been filled in.

> ⚠️ **Caution**
>
> You may use only plain text when writing the email subject and content. The email is also sent in plain text format.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'New Customer Account Notification' Email Template

You can edit the New Customer Account Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a 'New Customer Account Notification' Email Template section.

Remove a 'New Customer Account Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Resend Customer Account Details Notification' Templates

This notification is sent when an user chooses to resend all the details of a certain customer account by selecting the Resend contact details check box available when editing an account. The notification can be sent to the customer account owner (default), the administrator (default), or to another custom email address.

To access the 'Resend Customer Account Details Notification' Templates management page, click the Edit link available in the Text column.

The 'Resend Customer Account Details Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.

- Add a new email template.

- Edit an existing email template.

- Remove email templates.

You can add a new template by clicking the ⬚ **Add an email template** icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.

- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the [Edit a 'Resend Customer Account Details Notification' Email Template](#) section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> ⬚ **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Resend Customer Account Details Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⬚ ⬚ icons.

     ◦ Language - Use the drop-down list to select the notification language.

◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

> ⚠ Caution
>
> Only one template can be added for each language!

◦ Encoding - Use the drop-down list to select the email template type:

▪ Text

▪ HTML

◦ Email subject - Use the available text box to specify the email template title.

> 📝 Note
>
> When you try to create a new email template, this field is populated with the default subject: **Customer Account Details**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

▪ [recipient_name] - It will be replaced with the name of the person receiving the notification.

▪ [contact_name] - It will be replaced with the name of the contact person specified for the customer account.

▪ [login] - It will be replaced with the username specified for the customer account.

▪ [password] - It will be replaced with the password associated to the customer account.

▪ [company_name] - It will be replaced with the company name specified for the customer account, if this information had been filled in.

▪ [phone] - It will be replaced with the phone number specified for the customer account, if this information had been filled in.

▪ [fax] - It will be replaced with the fax number specified for the customer account, if this information had been filled in.

▪ [address] - It will be replaced with the contact address specified for the customer account, if this information had been filled in.

- [email] - It will be replaced with the contact email address specified for the customer account, if this information had been filled in.

- [city] - It will be replaced with the city specified for the customer account, if this information had been filled in.

- [state] - It will be replaced with the state specified for the customer account, if this information had been filled in.

- [country] - It will be replaced with the country specified for the customer account.

- [zip] - It will be replaced with the postal code specified for the customer account, if this information had been filled in.

- [notes] - It will be replaced with the notes specified for the customer account, if this information had been filled in.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'Resend Customer Account Details Notification' Email Template

You can edit the Resend Customer Account Details Notification template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Resend Customer Account Details Notification' Email Template section.

Remove a 'Resend Customer Account Details Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Customer Account Password Reminder Notification' Templates

This notification is sent when an user chooses to use the forgotten password mechanism available in the public store. The notification contains his new login details and can be sent to the customer account owner (default), the administrator or to another custom email address.

To access the 'Forgot Password Notification' Templates management page, click the Edit link available in the Text column.

The 'Customer Account Password Reminder Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the Edit an 'Customer Account Password Reminder Notification' Email Template section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Customer Account Password Reminder Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

- Email Form

   ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

   You can add/remove several attachments using the ⊞ ⊟ icons.

   ◦ Language - Use the drop-down list to select the notification language.

   ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

   > ⚠ Caution
   >
   > Only one template can be added for each language!

   ◦ Encoding - Use the drop-down list to select the email template type:

     ▪ Text

     ▪ HTML

   ◦ Email subject - Use the available text box to specify the email template title.

   > 📝 Note
   >
   > When you try to create a new email template, this field is populated with the default subject: **Password Reminder**.

   ◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

     ▪ [recipient_name] - It will be replaced with the name of the person receiving the notification.

     ▪ [login] - It will be replaced with the username specified for the customer account.

     ▪ [new_password] - It will be replaced with the new password that was generated and that will be used from here on to access the customer account.

     ▪ [valid_minutes] - It will be replaced with the number of minutes the new password will be valid for. The customer must activate it in the specified time.

- [url] - It will be replaced with the URL address the customer has to use in order to activate the new password.
- [ip] - It will be replaced with the IP address of the user that requested the new password.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Customer Account Password Reminder Notification' Email Template

You can edit the Customer Account Password Reminder Notification template by clicking its [name](#) available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the [Add a New 'Customer Account Password Reminder Notification' Email Template](#) section.

Remove a 'Customer Account Password Reminder Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

Order Notification Email Templates

This category contains the templates required by orders related events like issuance and approval.

The 'New Order Notification' Templates

This notification is sent when a new order is placed either by a customer in the online store, either by the administrator from the Automation interface for an existing customer account. It can be sent to the customer account owner (default), the administrator (default), or to another custom email address.

To access the 'New Order Notification' Templates management page, click the [Edit](#) link available in the Text column.

The 'New Order Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 🔩 **Add an email template** icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

    Click the link if you want to view/edit the email template. For more information, check the <u>Edit a 'New Order Notification' Email Template</u> section.

    > 📝 **Note**
    >
    > The default subject contains the order number as well: **New Order [order_no] Notification**.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> 📝 **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a 'New Order Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

- Email Form
  - Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

    You can add/remove several attachments using the ⊞ ⊟ icons.

  - Language - Use the drop-down list to select the notification language.

  - Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

    ⚠ **Caution**

    Only one template can be added for each language!

  - Encoding - Use the drop-down list to select the email template type:
    - Text
    - HTML

  - Email subject - Use the available text box to specify the email template title.

    📒 **Note**

    When you try to create a new email template, this field is populated with the default subject: **New Order [order_no] Notification**.

  - Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:
    - [recipient_name] - It will be replaced with the name of the person receiving the notification (usually the customer that placed the order).
    - [order_no] - It will be replaced with the number of the order placed either from the online store, either from Automation .
    - [order_date] - It will be replaced with the date the order was registered in the system.
    - [customer_company_name] - It will be replaced with the company name specified for the customer account that placed the order.
    - [customer_contact_name] - It will be replaced with the contact name specified for the customer account that placed the order.

- [customer_phone] - It will be replaced with the contact phone number specified for the customer account that placed the order.

- [customer_fax] - It will be replaced with the contact fax number specified for the customer account that placed the order.

- [customer_address] - It will be replaced with the contact postal address specified for the customer account that placed the order.

- [customer_email] - It will be replaced with the contact email address specified for the customer account that placed the order.

- [customer_city] - It will be replaced with the city specified for the customer account that placed the order.

- [customer_state] - It will be replaced with the state specified for the customer account that placed the order.

- [customer_country] - It will be replaced with the country specified for the customer account that placed the order.

- [customer_zip] - It will be replaced with the postal code specified for the customer account that placed the order.

- [customerb_company_name] - It will be replaced with the company name specified in the billing details of the customer account that placed the order.

- [customerb_contact_name] - It will be replaced with the contact name specified in the billing details of the customer account that placed the order.

- [customerb_phone] - It will be replaced with the contact phone number specified in the billing details of the customer account that placed the order.

- [customerb_fax] - It will be replaced with the contact fax number specified in the billing details of the customer account that placed the order.

- [customerb_address] - It will be replaced with the contact postal address specified in the billing details of the customer account that placed the order.

- [customerb_email] - It will be replaced with the contact email address specified in the billing details of the customer account that placed the order.

- [customerb_city] - It will be replaced with the city specified in the billing details of the customer account that placed the order.

- [customerb_state] - It will be replaced with the state specified in the billing details of the customer account that placed the order.

- [customerb_country] - It will be replaced with the country specified in the billing details of the customer account that placed the order.

- [customerb_zip] - It will be replaced with the postal code specified in the billing details of the customer account that placed the order.

- [invoice_no] - It will be replaced with the number of the invoice created for the order placed either from the online store, either from Automation.

- [repeat src=order_products] - This command is used at repeating the price details of each item if more than one had been ordered. The details that will be displayed for each item are the ones available until the [/repeat] command.

- [product_qty] - It will be replaced with the quantity from the specific item ordered by the customer account.

- [product_name] - It will be replaced with the item's instance descriptive name.

- [/repeat] - This command marks the ending of the block that displays the each item's.

- [order_amount] - It will be replaced with the total value before taxes of all the items ordered by the customer.

- [order_tax_percent] - It will be replaced with the quantum of the tax, in percents, that has to be charged for the ordered items.

- [order_tax_amount] - It will be replaced with the amount of the tax described above. This sum is computed as a percent of the [order_amount].

> **Note**
>
> Example:
>
> If the [order_amount] is 1,000 and the [order_tax_percent] is 10%, than the [order_tax_amount] is 100: 1,000*10% = 100.

- [order_total_amount] - It will be replaced with the total amount of the ordered items, including taxes. The total amount is computed by adding the [order_tax_amount] to the [order_amount].

> **Note**
>
> If the [order_amount] is 1,000 and the [order_tax_amount] is 100, the [order_total_amount] is 1,100: 1,000 + 100 = 1,100.

- ▪ [invoice_url] - It will be replaced with the URL that can be accessed in order to visualize the invoice created for the customer's order.
- ▪ [ip] - It will be replaced with the IP address from where the order was placed.
- ▪ [hostname] - It will be replaced with the hostname from where the order was placed.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'New Order Notification' Email Template

You can edit the New Order Notification template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'New Order Notification' Email Template section.

Remove a 'New Order Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Order Approval Notification' Templates

This notification is sent when a new order is placed either by a customer in the online store, either by the administrator from the Automation interface for an existing customer account. The order will have to be approved using this notification by the administrator. It can be sent to the administrator (default), or to another custom email address.

To access the 'Order Approval Notification' Templates management page, click the Edit link available in the Text column.

The 'Order Approval Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the ▶ Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

Click the link if you want to view/edit the email template. For more information, check the Edit an 'Order Approval Notification' Email Template section.

> **Note**
>
> The default subject contains the order number as well: **New Order Number [order_no] Approval Notification**.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Order Approval Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

- Email Form

  ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

    You can add/remove several attachments using the ⊞ ⊟ icons.

  ◦ Language - Use the drop-down list to select the notification language.

  ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

  ⚠ **Caution**

  Only one template can be added for each language!

  ◦ Encoding - Use the drop-down list to select the email template type:

    ▪ Text

    ▪ HTML

  ◦ Email subject - Use the available text box to specify the email template title.

  📋 **Note**

  When you try to create a new email template, this field is populated with the default subject: **New Order Number [order_no] Approval Notification**.

  ◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

    ▪ [recipient_name] - It will be replaced with the name of the person receiving the notification (usually the customer that has placed the order).

    ▪ [order_no] - It will be replaced with the number of the order placed either from the online store, either from Automation.

    ▪ [order_date] - It will be replaced with the date the order was registered in the system.

    ▪ [customer_company_name] - It will be replaced with the company name specified for the customer account that placed the order.

    ▪ [customer_contact_name] - It will be replaced with the contact name specified for the customer account that placed the order.

- [customer_phone] - It will be replaced with the contact phone number specified for the customer account that placed the order.

- [customer_fax] - It will be replaced with the contact fax number specified for the customer account that placed the order.

- [customer_address] - It will be replaced with the contact address specified for the customer account that placed the order.

- [customer_email] - It will be replaced with the contact email address specified for the customer account that placed the order.

- [customer_city] - It will be replaced with the city specified for the customer account that placed the order.

- [customer_state] - It will be replaced with the state specified for the customer account that placed the order.

- [customer_country] - It will be replaced with the country specified for the customer account that placed the order.

- [customer_zip] - It will be replaced with the postal code specified for the customer account that placed the order.

- [customerb_company_name] - It will be replaced with the company name specified in the billing details of the customer account that placed the order.

- [customerb_contact_name] - It will be replaced with the contact name specified in the billing details of the customer account that placed the order.

- [customerb_phone] - It will be replaced with the contact phone number specified in the billing details of the customer account that placed the order.

- [customerb_fax] - It will be replaced with the contact fax number specified in the billing details of the customer account that placed the order.

- [customerb_address] - It will be replaced with the contact address specified in the billing details of the customer account that placed the order.

- [customerb_email] - It will be replaced with the contact email address specified in the billing details of the customer account that placed the order.

- [customerb_city] - It will be replaced with the city specified in the billing details of the customer account that placed the order.

- `[customerb_state]` - It will be replaced with the state specified in the billing details of the customer account that placed the order.

- `[customerb_country]` - It will be replaced with the country specified in the billing details of the customer account that placed the order.

- `[customerb_zip]` - It will be replaced with the postal code specified in the billing details of the customer account that placed the order.

- `[invoice_no]` - It will be replaced with the number of the invoice created for the order placed either from the online store, either from Automation.

- `[repeat src=order_products]` - This command is used at repeating the price details of each item if more than one was ordered. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[product_qty]` - It will be replaced with the quantity from the specific item ordered by the customer account.

- `[product_name]` - It will be replaced with the ordered item's descriptive name.

- `[/repeat]` - This command marks the ending of the block that displays the each item's details.

- `[order_amount]` - It will be replaced with the total value before taxes of all the items ordered by the customer.

- `[order_tax_percent]` - It will be replaced with the quantum of the tax, in percents, that has to be charged for the ordered items.

- `[order_tax_amount]` - It will be replaced with the amount of the tax described above. This sum is computed as a percent of the `[order_amount]`.

> **Note**
>
> Example:
>
> If the `[order_amount]` is 1,000 and the `[order_tax_percent]` is 10%, than the `[order_tax_amount]` is 100: 1,000*10% = 100.

- `[order_total_amount]` - It will be replaced with the total amount of the ordered items, including taxes. The total amount is computed by adding the `[order_tax_amount]` to the `[order_amount]`.

> **Note**
>
> If the `[order_amount]` is 1,000 and the `[order_tax_amount]` is 100, the `[order_total_amount]` is 1,100: 1,000 + 100 = 1,100.

- `[invoice_url]` - It will be replaced with the URL that can be accessed to visualize the invoice created for the customer's order.

- `[order_approve_url]` - It will be replaced with the URL that can be accessed to approve the ordered items' deployment.

- `[ip]` - It will be replaced with the IP address from where the order was placed.

- `[hostname]` - It will be replaced with the hostname from where the order was placed.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Order Approval Notification' Email Template

You can edit the Order Approval Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Order Approval Notification' Email Template section.

Remove an 'Order Approval Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

Invoice Notification Email Templates

This category contains the templates required by invoice related events like issuance, payment, refund and automatic scripts.

The 'Invoice Payment Notification' Templates

This notification is sent when a customer account owner successful makes a payment for an existing invoice in the online store. It can be sent to the customer

account owner (default), the administrator (default) or to another custom email address.

To access the 'Invoice Payment Notification' Templates management page, click the Edit link available in the Text column.

The 'Invoice Payment Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.

- Search the email templates list using specific criteria.

- Add a new email template.

- Edit an existing email template.

- Remove email templates.

You can add a new template by clicking the 📋 Add an email template icon available in the Tools area.

VoipNow Automation displays, in the Email Templates area, the following information about each template:

- Language - The language the notification is written in.

- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the Edit an 'Invoice Payment Notification' Email Template section.

  > 📝 **Note**
  >
  > The default subject contains the invoice number as well: **Invoice [invoice_no] Successfully Paid!**.

- Encoding - An email template can be sent either in a Text or a HTML format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Invoice Payment Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

     You can add/remove several attachments using the ➕ ➖ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

     > ⚠ **Caution**
     >
     > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ Text

       ▪ HTML

     ◦ Email subject - Use the available text box to specify the email template title.

     > **Note**
     >
     > When you try to create a new email template, this field is populated with the default subject: **Invoice [invoice_no] Successfully Paid!**.

     ◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- `[recipient_name]` - It will be replaced with the name of the person receiving the notification (usually the customer that has made the payment).

- `[invoice_no]` - It will be replaced with the number of the invoice created for the order placed either from the online store, either from Automation.

- `[repeat src=order_products]` - This command is used at repeating the price details of each item if more than one has been ordered. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[product_qty]` - It will be replaced with the quantity from the specific item ordered by the customer account.

- `[product_name]` - It will be replaced with the ordered item's descriptive name.

- `[/repeat]` - This command marks the ending of the block that displays the each item's details.

- `[invoice_amount]` - It will be replaced with the total value before taxes of all the items ordered by the customer.

- `[invoice_tax_percent]` - It will be replaced with the quantum of the tax, in percents, that has to be charged for the ordered items.

- `[invoice_tax_amount]` - It will be replaced with the amount of the tax described above. This sum is computed as percent of the `[invoice_amount]`.

> **Note**
>
> Example:
>
> If the `[invoice_amount]` is 1,000 and the `[invoice_tax_percent]` is 10%, than the `[invoice_tax_amount]` is 100: 1,000*10% = 100.

- `[invoice_total_amount]` - It will be replaced with the total amount of the ordered items, including taxes. The total amount is computed by adding the `[invoice_tax_amount]` to the `[invoice_amount]`.

> **Note**
>
> If the `[invoice_amount]` is 1,000 and the `[invoice_tax_amount]` is 100, the `[invoice_total_amount]` is 1,100: 1,000 + 100 = 1,100.

- [invoice_url] - It will be replaced with the URL that can be accessed to visualize the invoice created for the customer's order.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Invoice Payment Notification' Email Template

You can edit the Invoice Payment Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Invoice Payment Notification' Email Template section.

Remove an 'Invoice Payment Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Automatic Invoice Payment Notification' Templates

This notification is sent when the automatic payment scheduled task successfully makes a payment for an invoice or when an user issues a payment for an invoice belonging to a customer account that has active subscriptions defined in the Automation interface. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'Automatic Invoice Payment Notification' Templates management page, click the Edit link available in the Text column.

The 'Automatic Invoice Payment Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.

- Search the email templates list using specific criteria.

- Add a new email template.

- Edit an existing email template.

- Remove email templates.

You can add a new template by clicking the 📇 **Add an email template** icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the <u>Edit an 'Automatic Invoice Payment Notification' Email Template</u> section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> 📝 **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Automatic Invoice Payment Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:
   - Email Form
     - Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ➕ ➖ icons.
     - Language - Use the drop-down list to select the notification language.
     - Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

> ⚠️ **Caution**
>
> Only one template can be added for each language!

◦ **Encoding** - Use the drop-down list to select the email template type:

  ▪ `Text`

  ▪ `HTML`

◦ **Email subject** - Use the available text box to specify the email template title.

> 📝 **Note**
>
> When you try to create a new email template, this field is populated with the default subject: **Automatic Payment Successful!**.

◦ **Email body** - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

  ▪ `[recipient_name]` - It will be replaced with the name of the person receiving the notification (usually the customer that has made the payment).

  ▪ `[repeat src=invoice_paid_detail]` - This command is used at repeating the invoice details if more than one invoice has been automatically paid. The details that will be displayed for each invoice are the ones available until the `[/repeat]` command.

  ▪ `[invoice_no]` - It will be replaced with the number of the invoice that was automatically paid.

  ▪ `[invoice_due]` - It will be replaced with the due date of the invoice that was automatically paid.

  ▪ `[invoice_amount]` - It will be replaced with the total value before taxes of all the items ordered by the customer.

  ▪ `[invoice_tax_percent]` - It will be replaced with the quantum of the tax, in percents, that has to be charged for the ordered items.

  ▪ `[invoice_tax_amount]` - It will be replaced with the amount of the tax described above. This sum is computed as percent of the `[invoice_amount]`.

  > 📝 **Note**
  >
  > Example:

> If the `[invoice_amount]` is 1,000 and the `[invoice_tax_percent]` is 10%, than the `[invoice_tax_amount]` is 100: 1,000*10% = 100.

- `[invoice_total_amount]` - It will be replaced with the total amount of the ordered items, including taxes. The total amount is computed by adding the `[invoice_tax_amount]` to the `[invoice_amount]`.

> **Note**
>
> If the `[invoice_amount]` is 1,000 and the `[invoice_tax_amount]` is 100, the `[invoice_total_amount]` is 1,100: 1,000 + 100 = 1,100.

- `[invoice_payment_details]` - It will be replaced with the invoice payment details (last 4 digits of the credit card or document number for offline payments).

- `[invoice_url]` - It will be replaced with the URL that can be accessed to visualize the invoice created for the customer's order.

- `[/repeat]` - This command marks the ending of the block that displays the details of each invoice.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Automatic Invoice Payment Notification' Email Template

You can edit the Automatic Invoice Payment Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Automatic Invoice Payment Notification' Email Template section.

Remove an 'Automatic Invoice Payment Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Automatic Invoice(s) Payment Failure Notification' Templates

This notification is sent when the payment attempt fails, advising the customer account owner to review his account's payment details or to make the payment manually. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

> **Note**
>
> This notification refers to the Invoices auto payment scheduled task's behavior.

To access the 'Automatic Invoice(s) Payment Failure Notification' Templates management page, click the Edit link available in the Text column.

The 'Automatic Invoice(s) Payment Failure Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the ⮐ Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the Edit an 'Automatic Invoice(s) Payment Failure Notification ' Email Template section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Automatic Invoice(s) Payment Failure Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       > ⚠ **Caution**
       >
       > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ Text

       ▪ HTML

     ◦ Email subject - Use the available text box to specify the email template title.

       > **Note**
       >
       > When you try to create a new email template, this field is populated with the default subject: **Automatic Payment Failed!**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- [recipient_name] - It will be replaced with the name of the person receiving the notification.

- [repeat src=invoice_notpaid_detail] - This command is used at displaying the invoice details of all the invoices that failed to be auto-paid. The details that will be displayed for each invoice are the ones available until the [/repeat] command.

- [invoice_no] - It will be replaced with number of the invoice that was rejected from automatic payment.

- [invoice_amount] - It will be replaced with the total value of all the items ordered by the customer.

- [invoice_notpaid_error] - It will be replaced with the error that occurred during the automatic payment process.

- [invoice_pay_attempt_no] - It will be replaced with the automatic payment attempt number. The system tries for a predefined number of attempts to complete the invoice automatic payment.

- [/repeat] - This command marks the ending of the block that displays the details of each invoice.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Automatic Invoice(s) Payment Failure Notification' Email Template

You can edit the Automatic Invoice(s) Payment Failure Notification template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Automatic Invoice(s) Payment Failure Notification' Email Template section.

Remove an 'Automatic Invoice(s) Payment Failure Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Automatic Invoice(s) Payment Final Failure Notification' Templates

This notification is sent when the last payment attempt fails, informing the customer account owner that he must make the payment manually. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'Automatic Invoice(s) Payment Final Failure Notification' Templates management page, click the Edit link available in the Text column.

The 'Automatic Invoice(s) Payment Final Failure Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 🖼 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the Edit an 'Automatic Invoice(s) Payment Final Failure Notification' Email Template section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Automatic Invoice(s) Payment Final Failure Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       > ⚠ **Caution**
       >
       > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ Text

       ▪ HTML

     ◦ Email subject - Use the available text box to specify the email template title.

       > **Note**
       >
       > When you try to create a new email template, this field is populated with the default subject: **Last Automatic Payment Attempt Failed!**.

     ◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- `[recipient_name]` - It will be replaced with the name of the person receiving the notification.

- `[repeat src=invoice_notpaid_final_detail]` - This command is used at displaying the invoice details of all the invoices that failed to be auto-paid during the last payment attempt. The details that will be displayed for each invoice are the ones available until the `[/repeat]` command.

- `[invoice_no]` - It will be replaced with number of the invoice that could not be paid at the last automatic payment attempt.

- `[invoice_amount]` - It will be replaced with the total value of all the items ordered by the customer.

- `[invoice_notpaid_final_error]` - It will be replaced with the error that occurred during the last automatic payment attempt.

- `[invoice_url]` - It will be replaced with the URL the customer account owner must access to manually complete the payment.

- `[/repeat]` - This command marks the ending of the block that displays the details of each invoice.

> **Note**
>
> In the email template body, the following warning message is displayed:
>
> `This was the last attempt in order to pay your invoice(s).`

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Automatic Invoice(s) Payment Final Failure Notification' Email Template

You can edit the Automatic Invoice(s) Payment Final Failure Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Automatic Invoice(s) Payment Final Failure Notification' Email Template section.

Remove an 'Automatic Invoice(s) Payment Final Failure Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'New Pending Invoice(s) Automatic Payment Notification' Templates

This notification is sent to inform a customer account owner who has available subscriptions defined in the Automation interface that a new invoice has been issued and that it will be automatically paid. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'New Pending Invoice(s) Automatic Payment Notification' Templates management page, click the Edit link available in the Text column.

The 'New Pending Invoice(s) Automatic Payment Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 🖼 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the Edit a 'New Pending Invoice(s) Automatic Payment Notification' Email Template section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a 'New Pending Invoice(s) Automatic Payment Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

     > ⚠ **Caution**
     >
     > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       - `Text`

       - `HTML`

     ◦ Email subject - Use the available text box to specify the email template title.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

  ▪ [recipient_name] - It will be replaced with the name of the person receiving the notification.

  ▪ [repeat src=invoice_detail] - This command is used at repeating the invoice details if more than one new invoice has been issued. The details that will be displayed for each invoice are the ones available until the [/repeat] command.

  ▪ [invoice_no] - It will be replaced with the number of the automatically issued invoice.

  ▪ [invoice_amount] - It will be replaced with the total value before taxes of all the items ordered by the customer.

  ▪ [invoice_tax_percent] - It will be replaced with the quantum of the tax, in percents, that has to be charged for the ordered items.

  ▪ [invoice_tax_amount] - It will be replaced with the amount of the tax described above. This sum is computed as percent of the [invoice_amount].

> **Note**
>
> Example:
>
> If the [invoice_amount] is 1,000 and the [invoice_tax_percent] is 10%, than the [invoice_tax_amount] is 100: 1,000*10% = 100.

  ▪ [invoice_total_amount] - It will be replaced with the total amount of the ordered items, including taxes. The total amount is computed by adding the [invoice_tax_amount] to the [invoice_amount].

> **Note**
>
> If the [invoice_amount] is 1,000 and the [invoice_tax_amount] is 100, the [invoice_total_amount] is 1,100: 1,000 + 100 = 1,100.

- [invoice_due] - It will be replaced with the due date of the invoice that was automatically paid.
- [invoice_url] - It will be replaced with the URL that can be accessed by the customer account owner to visualize or to pay the invoice issued for his order.
- [/repeat] - This command marks the ending of the block that displays the details of each invoice.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'New Pending Invoice(s) Automatic Payment Notification' Email Template

You can edit the New Pending Invoice(s) Automatic Payment Notification template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'New Pending Invoice(s) Automatic Payment Notification' Email Template section.

Remove a 'New Pending Invoice(s) Automatic Payment Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'New Pending Invoice(s) Manual Payment Notification' Templates

This notification is sent to inform a customer account owner who has no subscriptions defined in the Automation interface that a new invoice has been issued and that he has to manually pay it on time. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'New Pending Invoice(s) Manual Payment Notification' Templates management page, click the Edit link available in the Text column.

The 'New Pending Invoice(s) Manual Payment Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.

- Search the email templates list using specific criteria.

- Add a new email template.

- Edit an existing email template.

- Remove email templates.

You can add a new template by clicking the 🖼️ Add an email template icon available in the `Tools` area.

> **Note**
>
> To set the time interval the notification is sent to the customer account until the payment will be made, fill in the **Send every {x} days until paid** field available in the `Email Preferences` area. The default value is 1.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.

- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the [Edit a 'New Pending Invoice(s) Manual Payment Notification' Email Template](#) section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a 'New Pending Invoice(s) Manual Payment Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     - Upload template attachment - Use the ⬛ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     - Language - Use the drop-down list to select the notification language.

     - Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       > ⚠️ **Caution**
       >
       > Only one template can be added for each language!

     - Encoding - Use the drop-down list to select the email template type:

       - Text

       - HTML

     - Email subject - Use the available text box to specify the email template title.

       > 📒 **Note**
       >
       > When you try to create a new email template, this field is populated with the default subject: **New Invoice(s) Pending in Your Account - Manual Payment Required**.

     - Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

       - `[recipient_name]` - It will be replaced with the name of the person receiving the notification.

       - `[repeat src=invoice_manualpay_detail]` - This command is used at repeating the invoice details if more than one invoice must be manually paid by the customer account owner. The details that will be displayed for each invoice are the ones available until the `[/repeat]` command.

- [invoice_no] - It will be replaced with the number of the invoice that has to be manually paid.

- [invoice_amount] - It will be replaced with the total value before taxes of all the items ordered by the customer account owner.

- [invoice_tax_percent] - It will be replaced with the quantum of the tax, in percents, that has to be charged for the items.

- [invoice_tax_amount] - It will be replaced with the amount of the tax described above. This sum is computed as percent of the [invoice_amount].

> **Note**
>
> Example:
>
> If the [invoice_amount] is 1,000 and the [invoice_tax_percent] is 10%, than the [invoice_tax_amount] is 100: 1,000*10% = 100.

- [invoice_total_amount] - It will be replaced with the total amount of the ordered items, including taxes. The total amount is computed by adding the [invoice_tax_amount] to the [invoice_amount].

> **Note**
>
> If the [invoice_amount] is 1,000 and the [invoice_tax_amount] is 100, the [invoice_total_amount] is 1,100: 1,000 + 100 = 1,100.

- [invoice_due] - It will be replaced with the due date of the invoice that was automatically paid.

- [invoice_url] - It will be replaced with the URL that can be accessed by the customer account owner to visualize or to pay the invoice issued for his order.

- [/repeat] - This command marks the ending of the block that displays the details of each invoice.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'New Pending Invoice(s) Manual Payment Notification' Email Template

You can edit the New Pending Invoice(s) Manual Payment Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'New Pending Invoice(s) Manual Payment Notification' Email Template section.

Remove a 'New Pending Invoice(s) Manual Payment Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'New Refund Invoice Notification' Templates

This notification is sent to the customer account owner (default), the administrator (default) or to another custom email address every time a refund invoice is issued for an one of the account's initial invoices.

To access the 'New Refund Invoice Notification' Templates management page, click the Edit link available in the Text column.

The 'New Refund Invoice Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 🗒 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

Click the link if you want to view/edit the email template. For more information, check the [Edit a 'New Refund Invoice Notification' Email Template](#) section.

> **Note**
>
> The default subject contains the initial invoice number as well: **New Refund Invoice Issued for Initial Invoice [initial_invoice_no]**.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a 'New Refund Invoice Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

        You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

     > ⚠ **Caution**
     >
     > Only one template can be added for each language!

◦ Encoding - Use the drop-down list to select the email template type:

  ▪ Text

  ▪ HTML

◦ Email subject - Use the available text box to specify the email template title.

> **Note**
>
> When you try to create a new email template, this field is populated with the default subject: **New Refund Invoice Issued for Initial Invoice [initial_invoice_no].**

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

  ▪ [recipient_name] - It will be replaced with the name of the person receiving the notification.

  ▪ [invoice_no_initial] - It will be replaced with the number of the initial invoice for which the refund invoice was issued.

  ▪ [invoice_no] - It will be replaced with the number of the refund invoice that was successfully issued for the customer account.

  ▪ [invoice_amount] - It will be replaced with the total amount that is going to be paid back to the customer account owner.

  ▪ [invoice_url] - It will be replaced with the URL that can be accessed to visualize the invoice created for the customer's order.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'New Refund Invoice Notification' Email Template

You can edit the New Refund Invoice Notification template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'New Refund Invoice Notification' Email Template section.

Remove a 'New Refund Invoice Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Automatic Charging Report Notification' Templates

This notification is sent every time the report is run. The purpose of this scheduled task is to pay the pending invoices by automatically charging the customer accounts according to the submitted payment subscriptions. The time frame when the task is ran can be set in the scheduled task's script. By default, the task is ran daily at 45 minutes past 6. The notification can be sent to the administrator (default) or to another custom email address.

To access the 'Automatic Charging Report Notification' Templates management page, click the Edit link available in the Text column.

The 'Automatic Charging Report Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 📑 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

   Click the link if you want to view/edit the email template. For more information, check the Edit an 'Automatic Charging Report Notification' Email Template section.
- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Automatic Charging Report Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

     > ⚠ **Caution**
     >
     > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ Text

       ▪ HTML

     ◦ Email subject - Use the available text box to specify the email template title.

     > **Note**
     >
     > When you try to create a new email template, this field is populated with the default subject: **[automation_apptitle] Auto-Charging Task Report**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

▪ [recipient_name] - It will be replaced with the name of the person receiving the notification.

▪ [autotask_rundate] - It will be replaced with the date when the scheduled task was executed.

> **Note**
>
> Scheduled task example: `45 6 * * * command to be executed`
>
> The command will be run at 6:45 every day of the week, all the month.

▪ [invoice_paid_no] - It will be replaced with the total number of invoices that have been automatically paid by charging the customer account owners' payment subscriptions.

▪ [invoice_notpaid_no] - It will be replaced with the total number of invoices that could not be automatically paid due to certain errors.

▪ [invoice_notpaid_final_no] - It will be replaced with the total number of invoices for which the auto-charging scheduled task tried for the last time, without success, to capture the payment.

▪ [invoice_manualpay_no] - It will be replaced with the total number of invoices that have to be manually paid and for which the scheduled task has sent notifications to the customer account owners.

▪ [repeat src=invoice_paid] - This command is used when there are more customer account owners that have automatically paid invoices. The system administrator will receive a notification with all the paid invoices, grouped for every customer account in this situation. The details that will be displayed for each customer account are the ones available until the [/repeat] command.

▪ [customer_name] - It will be replaced with the name of the customer account whose invoices have been automatically paid.

▪ [repeat src=invoice_paid_detail] - This command is used at repeating the invoice details if more than one invoice has been automatically paid for the specified customer account. The details that will be displayed for each invoice are the ones available until the [/repeat] command.

▪ [invoice_no] - It will be replaced with the number of the invoice that was automatically paid.

- `[invoice_amount]` - It will be replaced with the total value of the invoice that has been automatically paid.

- `[/repeat]` - This command marks the ending of the blocks previously defined.

- `[repeat src=invoice_manualpay]` - This command is used when there is more than one customer account owner with invoices that have to be manually paid. The system administrator will receive a notification with all the unpaid invoices, grouped for every customer account owner in this situation. The details that will be displayed for each customer account owner are the ones available until the `[/repeat]` command.

- `[customer_name]` - It will be replaced with the name of the customer account whose invoices could not be automatically paid and that have to be paid manually.

- `[repeat src=invoice_manualpay_details]` - This command is used at repeating the invoice details if more than one invoice could not be automatically paid and the customer account owner has been notified that he must manually pay them. The details that will be displayed for each invoice are the ones available until the `[/repeat]` command.

- `[invoice_no]` - It will be replaced with the number of the invoice that has to be manually paid by the customer account owner.

- `[invoice_due]` - It will be replaced with the date until the invoice can be paid.

- `[invoice_amount]` - It will be replaced with the total value of the invoice that must be manually paid.

- `[repeat src=invoice_notpaid]` - This command is used when more than one customer account owner has invoices that failed to be automatically paid due to a certain error. The system administrator will receive a notification with all the unpaid invoices, grouped for every customer account owner in this situation. The details that will be displayed for each customer account owner are the ones available until the `[/repeat]` command.

- `[customer_name]` - It will be replaced with the name of the customer account owner whose invoices could not be automatically paid due to a specific problem.

- `[repeat src=invoice_notpaid_details]` - This command is used at repeating the invoice details if more than one invoice could not be automatically paid due to certain error. The details that will be

displayed for each invoice are the ones available until the `[/repeat]` command.

- `[invoice_no]` - It will be replaced with the number of the invoice that could not be paid due to a certain error.

- `[invoice_amount]` - It will be replaced with the total value of the invoice that could not be paid due to a certain error.

- `[invoice_notpaid_error]` - It will be replaced with the error that occurred during the automatic payment process.

- `[invoice_pay_attempt_no]` - It will be replaced with the automatic payment attempt number. The system tries for a predefined number of attempts to complete the invoice automatic payment.

- `[repeat src=invoice_notpaid_final]` - This command is used when there is more than one customer account owner with invoices that failed to be automatically paid at the last attempt. The system administrator will receive a notification with all the unpaid invoices, grouped for every customer account owner in this situation. The details that will be displayed for each customer account owner are the ones available until the `[/repeat]` command.

- `[customer_name]` - It will be replaced with the name of the customer account owner whose invoices could not be automatically paid and for which no further attempt will be made.

- `[repeat src=invoice_notpaid_details]` - This command is used at repeating the invoice details if more than one invoice could not be automatically paid at the final attempt due to a certain error. The details that will be displayed for each invoice are the ones available until the `[/repeat]` command.

- `[invoice_no]` - It will be replaced with the number of the invoice that could not be paid at the final automatic payment attempt.

- `[invoice_amount]` - It will be replaced with the total value of the invoice that could not be paid at the final automatic payment attempt.

- `[invoice_notpaid_final_error]` - It will be replaced with a description of the reason for which the final payment attempt has failed for the specific invoice.

- `[automation_apptitle]` - It will be replaced with the personalized application name, as set up by the user.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Automatic Charging Report Notification' Email Template

You can edit the Automatic Charging Report Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Automatic Charging Report Notification' Email Template section.

Remove an 'Automatic Charging Report Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Invoices Generation Report Notification' Templates

This notification is sent every time the report is run. The purpose of the task is to create automatic recurrent invoices for all the deployed services that require a fee to be paid from time to time (monthly, quarterly, etc.). Also, this task terminates the services enqueued for termination. The time frame when the task is ran can be set in the scheduled task's script. By default, the task is ran daily at 45 minutes past 6. The notification can be sent to the administrator (default) or to another custom email address.

To access the 'Invoices Generation Report Notification' Templates management page, click the Edit link available in the Text column.

The 'Invoices Generation Report Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the ▥ Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.

- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the **Edit an 'Invoices Generation Report Notification' Email Template** section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Invoices Generation Report Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       > **⚠ Caution**
       >
       > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ `Text`

       ▪ `HTML`

◦ Email subject - Use the available text box to specify the email template title.

> **Note**
>
> When you try to create a new email template, this field is populated with the default subject: **[automation_apptitle] Auto Invoice Generation Task Report**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- `[recipient_name]` - It will be replaced with the name of the person receiving the notification.

- `[autotask_rundate]` - It will be replaced with the date when the scheduled task was executed.

> **Note**
>
> Scheduled task example: `45 6 * * * command to be executed`
>
> The command will be run at 6:45, every day of the week, all the month.

- `[automation_apptitle]` - It will be replaced with the personalized application name, as set up by the user.

- `[invoice_generated_no]` - It will be replaced with the total number of invoices the scheduled task has successfully generated.

- `[prinstance_terminated_no]` - It will be replaced with the total number of master deployed services the scheduled task has successfully terminated.

- `[prinstance_terminated_slave_no]` - It will be replaced with the total number of independent slave deployed services the scheduled task has successfully terminated.

- `[prinstance_terminated_fail_no]` - It will be replaced with the total number of master deployed services that could not be automatically terminated by the scheduled task due to a specific error.

- `[prinstance_terminated_fail_slave_no]` - It will be replaced with the total number of independent slave deployed services that could not be automatically terminated by the scheduled task due to a specific error.

- [deployment_fetched_fail_no] - It will be replaced with the total number of deployed services for which no resources could be fetched.

- [repeat src=invoice_generated_detail] - This command is used when there are more than one invoices that have been automatically generated. The system administrator will receive a notification with the details of all the generated invoices. The details that will be displayed for every invoice are the ones available until the [/repeat] command.

- [invoice_no] - It will be replaced with the number of the generated invoice.

- [customer_name] - It will be replaced with the name of the customer account the generated invoice belongs to.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=invoice_generated_detail]).

- [repeat src=prinstance_terminated_success] - This command is used when there is more than one master deployed service that has been automatically terminated due to a certain reason (e.g.: the customer account owner requested it or the invoices were not paid and are overdue). The system administrator will receive a notification with all the services that have been terminated. The details that will be displayed for every instance are the ones available until the [/repeat] command.

- [product_sku] - It will be replaced with the terminated service Stock Keeping Unit.

- [product_name] - It will be replaced with the terminated service instance descriptive name.

- [prinstance_deployment_id] - It will be replaced with the service instance deployment identification number.

- [deploymentserver_url] - It will be replaced with the provisioning server URL address. The customer account owner may click this link to access the server.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_terminated_success]).

- [repeat src=prinstance_terminated_slave_success] - This command is used when there is more than one independent slave deployed service that has been automatically terminated due to a certain reason (e.g.: the customer account owner requested it or the invoices were not paid and are overdue). The system administrator will receive a notification with all the services that have been

terminated. The details that will be displayed for every instance are the ones available until the `[/repeat]` command.

- `[product_sku]` - It will be replaced with the terminated service Stock Keeping Unit.

- `[product_name]` - It will be replaced with the terminated service instance descriptive name.

- `[prinstance_deployment_id]` - It will be replaced with the service instance deployment identification number.

- `[deploymentserver_url]` - It will be replaced with the provisioning server URL address. The customer account owner may click this link to access the server.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_terminated_slave_success]).

- `[repeat  src=prinstance_terminated_fail]` - This command is used when there is more than one master deployed service that could not be automatically terminated due to a certain reason (e.g.: the provisioning server could not be contacted or an error occurred). The system administrator will receive a notification with all the services that could not be terminated. The details that will be displayed for every instance are the ones available until the `[/repeat]` command.

- `[product_sku]` - It will be replaced with the service Stock Keeping Unit.

- `[product_name]` - It will be replaced with the descriptive name of the service that could not be automatically terminated.

- `[prinstance_deployment_id]` - It will be replaced with the service deployment identification number.

- `[order_no]` - It will be replaced with the number of the order the service belongs to.

- `[deploymentserver_url]` - It will be replaced with the provisioning server URL address. The customer account owner may click on this link to access the server.

- `[prinstance_terminated_fail_error]` - It will be replaced with the error triggered by the automatic termination process. This error must be fixed with maximum priority in order to allow the scheduled task to work in the future.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_terminated_fail]).

- `[repeat    src=prinstance_terminated_slave_fail]` - This command is used when there is more than one independent slave deployed service that could not be automatically terminated due to a certain reason (e.g.: the provisioning server could not be contacted or an error occurred). The system administrator will receive a notification with all the services that could not be terminated. The details that will be displayed for every instance are the ones available until the `[/repeat]` command.

- `[product_sku]` - It will be replaced with the service Stock Keeping Unit.

- `[product_name]` - It will be replaced with the descriptive name of the service that could not be automatically terminated.

- `[prinstance_deployment_id]` - It will be replaced with the service deployment identification number.

- `[order_no]` - It will be replaced with the number of the order the service belongs to.

- `[deploymentserver_url]` - It will be replaced with the provisioning server URL address. The customer account owner may click on this link to access the server.

- `[prinstance_terminated_fail_error]` - It will be replaced with the error triggered by the automatic termination process. This error must be fixed with maximum priority in order to allow the scheduled task to work in the future.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_terminated_slave_fail]).

- `[repeat src=deployment_fetched_fail_detail]` - This command is used when resources from the provisioning servers cannot be allocated for more than one service. The system administrator will receive a notification with all the deployed services for which no resources could be fetched. The details that will be displayed for each service are the ones available until the `[/repeat]` command.

- `[product_sku]` - It will be replaced with the service Stock Keeping Unit.

- `[product_name]` - It will be replaced with the descriptive name of the service for which no resources could be fetched on the provisioning server.

- `[prinstance_deployment_id]` - It will be replaced with the service deployment identification number.

- [deploymentserver_url] - It will be replaced with the provisioning server URL address. The customer account owner may click on this link to access the server.
- [deployment_fetched_fail_error] - It will be replaced with the error triggered by this event.
- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=deployment_fetched_fail_detail]).

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Invoices Generation Report Notification' Email Template

You can edit the Invoices Generation Report Notification template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Invoices Generation Report Notification' Email Template section.

Remove an 'Invoices Generation Report Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Refund Invoice Payment Notification' Templates

This notification is sent to the customer account owner (default), the administrator (default) or to another custom email address every time a refund invoice has been successfully paid to the customer.

To access the 'Refund Invoice Payment Notification' Templates management page, click the Edit link available in the Text column.

The 'Refund Invoice Payment Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.

- Add a new email template.

- Edit an existing email template.

- Remove email templates.

You can add a new template by clicking the 🖼️ Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.

- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the <u>Edit a 'Refund Payment Notification' Email Template</u> section.

> 📝 Note
>
> The default subject contains the initial invoice number as well: **Refund Payment for Invoice [initial_invoice_no]**.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> 📝 Note
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Refund Invoice Payment Notification' Email Template

If yo u want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:
   - Email Form

◦ Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

You can add/remove several attachments using the ⊞ ⊟ icons.

◦ Language - Use the drop-down list to select the notification language.

◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

> ⚠ Caution
>
> Only one template can be added for each language!

◦ Encoding - Use the drop-down list to select the email template type:

- Text

- HTML

◦ Email subject - Use the available text box to specify the email template title.

> 📌 Note
>
> When you try to create a new email template, this field is populated with the default subject: **Refund Payment for Invoice [initial_invoice_no]**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- [recipient_name] - It will be replaced with the name of the person receiving the notification.

- [invoice_no] - It will be replaced with the number of the refund invoice that was successfully paid back to the customer.

- [invoice_amount] - It will be replaced with the refund invoice total amount.

- [invoice_tax_percent] - It will be replaced with the quantum of the tax, in percents, that has to be charged for the refunded items.

- [invoice_tax_amount] - It will be replaced with the amount of the tax described above. This sum is computed as percent of the [invoice_amount].

> **Note**
>
> **Example:**
>
> If the `[invoice_amount]` is 1,000 and the `[invoice_tax_percent]` is 10%, than the `[invoice_tax_amount]` is 100: 1,000*10% = 100.

- `[invoice_total_amount]` - It will be replaced with the total amount of the refund invoice, including taxes. The total amount is computed by adding the `[invoice_tax_amount]` to the `[invoice_amount]`.

> **Note**
>
> If the `[invoice_amount]` is 1,000 and the `[invoice_tax_amount]` is 100, the `[invoice_total_amount]` is 1,100: 1,000 + 100 = 1,100.

- `[invoice_no_initial]` - It will be replaced with the number of the invoice for which the refund was made.

- `[invoice_url]` - It will be replaced with the URL that can be accessed to visualize the refund invoice.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'Refund Invoice Payment Notification' Email Template

You can edit the Refund Payment Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Refund Invoice Payment Notification' Email Template section.

Remove a 'Refund Invoice Payment Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

Error/Failure Notification Email Templates

This category contains the templates required by errors that appeared during the automatic processes.

The 'Service Deployment-Related Operation Failure Notification' Templates

This notification is sent when the deployment, suspension or termination actions fail. It can be sent to the administrator (default) or to another custom email address.

To access the 'Service Deployment-Related Operation Failure Notification' Templates management page, click the Edit link available in the Text column.

The 'Service Deployment-Related Operation Failure Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the ⛏ Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the Edit an 'Service Deployment-Related Operation Failure Notification' Email Template section.

> **Note**
>
> The default subject contains the operation name as well: **Deployment-Related Operation [operation] Failed!**.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Service Deployment-Related Operation Failure Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

     > ⚠ **Caution**
     >
     > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ `Text`

- HTML
  - Email subject - Use the available text box to specify the email template title.

    > **Note**
    >
    > When you try to create a new email template, this field is populated with the default subject: **Deployment-Related Operation [operation] Failed!**.

  - Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:
    - [recipient_name] - It will be replaced with the name of the person receiving the notification.
    - [operation_date] - It will be replaced with the date when one of the operations failed to execute.
    - [operation] - It will be replaced with the name of the operation that failed to execute. The available operations are:
      - deployment
      - suspension
      - termination
    - [operation_error] - It will be replaced with a brief description of the reason for which the operation failed.

      > **Note**
      >
      > To find out more about the reasons behind this event, the user is advised to connect to the VoipNow Automation management interface.

    - [automation_apptitle] - It will be replaced with the personalized application name, as set up by the user.
2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Server Deployment-Related Operation Failure Notification' Email Template

You can edit the Operation Failure Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Server Deployment-Related Operation Failure Notification' Email Template section.

Remove a 'Server Deployment-Related Operation Failure Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Provisioning Server Unreachable/Down Notification' Templates

This notification is sent when the provisioning server could not be reached. It can be sent to the administrator (default) or to another custom email address.

To access the 'Provisioning Server Unreachable/Down Notification' Templates management page, click the Edit link available in the Text column.

The 'Provisioning Server Unreachable/Down Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 📧 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

Click the link if you want to view/edit the email template. For more information, check the Edit a 'Provisioning Server Unreachable/Down Notification' Email Template section.

> 📋 **Note**
>
> The default subject contains the IP address of the provisioning server as well: **Provisioning Server [deploymentserver_ip] Down**.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> 📋 **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Provisioning Server Unreachable/Down Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:
   - Email Form
     - Upload template attachment - Use the 📄 button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ➕ ➖ icons.
     - Language - Use the drop-down list to select the notification language.
     - Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       > ⚠️ **Caution**
       >
       > Only one template can be added for each language!

- Encoding - Use the drop-down list to select the email template type:
  - Text
  - HTML
- Email subject - Use the available text box to specify the email template title.

> **Note**
>
> When you try to create a new email template, this field is populated with the default subject: **Provisioning Server [deploymentserver_ip] Down**.

- Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:
  - [recipient_name] - It will be replaced with the name of the person receiving the notification.
  - [deploymentserver_ip] - It will be replaced with the IP address of the provisioning server that could not be reached.
  - [deploymentserver_url] - It will be replaced with the URL address of the provisioning server that could not be reached.
  - [deploymentserver_last_softdown] - It will be replaced with the date and time the provisioning server was contacted without receiving any answer.
  - [automation_apptitle] - It will be replaced with the personalized application name, as set up by the user.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'Provisioning Server Unreachable/Down Notification ' Email Template

You can edit the Provisioning Server Unreachable/Down Notification template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Provisioning Server Unreachable/Down Notification ' Email Template section.

Remove a 'Provisioning Server Unreachable/Down Notification ' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Online Store Down' Templates

This notification is sent to the administrator (default) or to another custom email address every time the online store is down due to an unexpected error.

To access the 'Online Store Down' Templates management page, click the Edit link available in the Text column.

The 'Online Store Down' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the ⬛ Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

    Click the link if you want to view/edit the email template. For more information, check the Edit an 'Online Store Down' Email Template section.
- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

Add a New 'Online Store Down' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       ⚠ Caution

       Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ Text

       ▪ HTML

     ◦ Email subject - Use the available text box to specify the email template title.

       Note

       When you try to create a new email template, this field is populated with the default subject: **Online Store Down**.

     ◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

       ▪ [recipient_name] - It will be replaced with the name of the person receiving the notification.

- [automation_apptitle] - It will be replaced with the personalized application name, as set up by the user.
- [store_url] - It will be replaced with the online store URL address.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Online Store Down' Email Template

You can edit the Online Store Down template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Online Store Down' Email Template section.

Remove an 'Online Store Down' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

Searching the Email Templates

When the email templates list is too long and you are searching for specific ones, the following filters can be used:

- Email subject – Use the text box to specify the subject of the email template you are looking for.
- Language - Use the drop-down list to select the language of the email template you are looking for.

Manage the Display Templates

Note

Access to the **Display Templates** management page is permitted:

- To the **Administrator** user.
- If the number of customer accounts is smaller than the maximum number of customer accounts allowed by the user's license type.

The display templates are automated messages displayed in specific pages of the online store as a result of the different actions performed by the customer account owner, for example after he has successfully placed an order. The text of the messages can be customized and new ones can be added for any type of event by clicking the Edit link available in the Text column.

VoipNow Automation provides a set of events that trigger the automated messages and that can be customized according to the user's needs. All the available messages are described in detail in the following sections.

The 'Received Order Confirmation' Display Template

This message is displayed in the online store after the customer account owner has successfully placed an order.

The 'Received Order Confirmation' Templates management page allows you to:

- View the available Display Templates list.
- Define a new template by clicking the Add a display template icon available in the Tools area.
- Search the display templates list using specific criteria.
- Edit an existing template.
- Remove unused display templates.

VoipNow Automation displays the following information about each template:

- Language - The language the notification is written in.
- Name - The notification's descriptive name, in the specific language. Click the link if you want to view/edit the template.
- Last update - The date when the system template was last modified.

Note
The default display template is highlighted using **bold** characters and cannot be deleted.

Add a New 'Received Order Confirmation' Display Template

To add a new template, you must follow the next steps:

1. Fill in the details available in the Add New Display Template page:

- Display template

  ◦ Language - Use the drop-down list to select the language to be used to display the template in the online store.

  ◦ Default - Select this check box if you want to use this template as the default one. The email templates in English are added in the database, at the first install, as the default email templates. You cannot add more than one template for the same language.

  ◦ Name - The display template title.

  > 📝 Note
  >
  > When you try to create a new display template, this field is populated with the default subject: **Your order [order_no] has been successfully received!**.

  ◦ Template body - The display template content. You can fill in the text you want to be displayed in the online store using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

    ▪ `[order_no]` - It will be replaced with the number of the order placed by the customer account owner from the online store.

    ▪ `[invoice_url]` - It will be replaced with the URL of the online invoice that has to be paid by check. The customer account owner can click this link in order to visualize all the details of his purchase.

    ▪ `[vendor_email]` - It will be replaced with the vendor's contact email address specified in his profile that can be used for addressing any queries the customer might have.

  > 📝 Note
  >
  > The tokens available for this template are displayed as a list. You can click each token if you want to add it to the text.

2. Click Ok to save the changes and create the new template. Click Cancel to return to the previous page without saving the changes.

Edit a 'Received Order Confirmation' Display Template

The Edit Display Template page allows you to modify the preferences based on your requirements, as described in the previous section.

> **Note**
>
> The **Use as default template** check box cannot be deselected when editing the current default display template because there must always be a default one defined in the system.

Remove an 'Received Order Confirmation' Display Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Failed Order' Display Template

This message is displayed in the online store after an order could not be initiated due to a particular reason.

The 'Failed Order' Templates management page allows you to:

- View the available Display Templates list.
- Define a new template by clicking the 📇 <u>Add a display template</u> icon available in the Tools area.
- Search the display templates list using specific criteria.
- Edit an existing template.
- Remove unused display templates.

VoipNow Automation displays the following information about each template:

- Language - The language the notification is written in.
- Name - The notification's descriptive name, in the specific language. Click the <u>link</u> if you want to view/edit the template.
- Last update - The date when the system template was last modified.

> **Note**
>
> The default display template is highlighted using **bold** characters and cannot be deleted.

Add a New 'Failed Order' Display Template

To add a new template, you must follow the next steps:

1. Fill in the details available in the New Display Template page:

   - Display template

     ◦ Language - Use the drop-down list to select the language to be used to display the template in the online store.

     ◦ Default - Select this check box if you want to use this template as the default one. The email templates in English are added in the database, at the first install, as the default email templates. You cannot add more than one template for the same language.

     ◦ Name - The display template title.

     > **Note**
     >
     > When you try to create a new display template, this field is populated with the default subject: **Your Order [order_no] Could Not Be Approved!**.

     ◦ Template body - The display template content. You can fill in the text you want to be displayed in the online store using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

       ▪ `[order_no]` - It will be replaced with the number of the order placed by the customer from the online store and that could not be approved.

       ▪ `[payment_error]` - It will be replaced with the reason for which the invoice could not be approved.

       ▪ `[invoice_url]` - It will be replaced with the URL that can be accessed to visualize the invoice created for the customer's order.

     > **Note**
     >
     > The tokens available for this template are displayed as a list. You can click each token if you want to add it to the text.

2. Click Ok to save the changes and create the new template. Click Cancel to return to the previous page without saving the changes.

Edit a 'Failed Order' Display Template

The Edit Display Template page allows you to modify the preferences based on your requirements, as described in the [previous](#) section.

> **Note**
>
> The **Use as default template** check box cannot be deselected when editing the current default display template because there must always be a default one defined in the system.

Remove a 'Failed Order' Display Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'New Invoice Generated' Display Template

This template is used to notify the user that an invoice was issued for his order.

The 'New Invoice Generated' Templates management page allows you to:

- View the available Display Templates list.
- Define a new template by clicking the 🛗 Add a display template icon available in the Tools area.
- Search the display templates list using specific criteria.
- Edit an existing template.
- Remove unused display templates.

VoipNow Automation displays the following information about each template:

- Language - The language the notification is written in.
- Name - The notification's descriptive name, in the specific language. Click the link if you want to view/edit the template.
- Last update - The date when the system template was last modified.

> **Note**
>
> The default display template is highlighted using **bold** characters and cannot be deleted.

Add a 'New Invoice Generated' Display Template

To add a new template, you must follow the next steps:

1. Fill in the details available in the New Display Template page:

   - Display template

     ◦ Language - Use the drop-down list to select the language to be used to display the template in the online store.

     ◦ Default - Select this check box if you want to use this template as the default one. The email templates in English are added in the database, at the first install, as the default email templates. You cannot add more than one template for the same language.

     ◦ Name - The display template title.

     > **Note**
     >
     > When you try to create a new display template, this field is populated with the default subject: **The Invoice [invoice_no] For Your Order [order_no]**.

     ◦ Template body - The display template content. The template has an invoice layout that provides all the required information about the placed order, the customer, the vendor, the payment details, etc. You can include tokens that will be automatically replaced by the system with the appropriate content:

       ▪ `[VENDOR_COMPANY]` - It will be replaced with the name of the vendor's company.

       ▪ `[VENDOR_TAX_ID]` - It will be replaced with the vendor's tax account number.

       ▪ `[VENDOR_ADDRESS]` - It will be replaced with the vendor's contact postal address.

       ▪ `[VENDOR_CITY]` - It will be replaced with the vendor's city.

       ▪ `[VENDOR_COUNTRY]` - It will be replaced with the vendor's country.

       ▪ `[VENDOR_PHONE]` - It will be replaced with the vendor's contact phone number.

       ▪ `[VENDOR_FAX]` - It will be replaced with the vendor's contact fax number.

       ▪ `[VENDOR_EMAIL]` - It will be replaced with the vendor's contact email address.

- [VENDOR_BANK] - It will be replaced with the vendor's bank.

- [VENDOR_BANK_ACCOUNT] - It will be replaced with the vendor's bank account that is used for receiving the payments for the provided services.

- [INVOICE_NO] - It will be replaced with the number of the current invoice.

- [INVOICE_DATE] - It will be replaced with the date the invoice was issued.

- [CUSTOMER_NAME] - It will be replaced with the name of the customer account owner that has placed the order on the online store.

- [CUSTOMER_EMAIL] - It will be replaced with the customer account owner's contact email address.

- [CUSTOMER_COMPANY] - It will be replaced with the name of the customer account owner's company.

- [CUSTOMER_TAX_ID] - It will be replaced with the customer account owner's tax account number.

- [CUSTOMER_STREET] - It will be replaced with the customer account owner's street address.

- [CUSTOMER_CITY] - It will be replaced with the customer account owner's city.

- [CUSTOMER_PCODE] - It will be replaced with the customer account owner's postal code.

- [CUSTOMER_STATE] - It will be replaced with the customer account owner's state.

- [CUSTOMER_COUNTRY] - It will be replaced with the customer account owner's country.

- [CUSTOMER_BANK] - It will be replaced with the customer account owner's bank.

- [CUSTOMER_BANK_ACCOUNT] - It will be replaced with the customer account owner's bank account used for transactions.

- [INVOICE_STATUS] - It will be replaced with the invoice's status that can be Purchase, Refund or Void.

- [INVOICE_DUE_DATE] - It will be replaced with the date until the invoice must be paid. Afterwards it will become overdue.

- [TAX_PERCENT] - It will be replaced with the tax level specified for the purchased items.

- {repeat_tag src=products} - This command is used at displaying all the order's items when the customer has purchased more than one. The specific details for each item are displayed until the {/repeat_tag} command.

- [QUANTITY] - It will be replaced with the quantity ordered from the specific item.

- [PRODUCT_NAME] - It will be replaced with the ordered item's descriptive name.

- {/repeat_tag} - This command marks the ending of the block with the details of all the ordered items.

- [PRODUCT_UNIT] - It will be replaced with the price charged for each item unit.

- [PRODUCT_TOTAL] - It will be replaced with the total item price, computed as a product of the [QUANTITY] and the [PRODUCT_UNIT].

- [SUBTOTAL] - It will be replaced with the ordered items' total value, before taxes.

- [TAX_VALUE] - It will be replaced with the tax total value, computed as a product of the [TAX_PERCENT] and the [SUBTOTAL].

- [TOTAL] - It will be replaced with the total value of the invoice, computed as a sum of the [SUBTOTAL] and the [SUBTOTAL]. This is the final amount the customer account owner must pay for his order.

> **Note**
>
> The tokens available for this template are displayed as a list. You can click each token if you want to add it to the text.

2. Click Ok to save the changes and create the new template. Click Cancel to return to the previous page without saving the changes.

Edit a 'New Invoice Generated' Display Template

The Edit Display Template page allows you to modify the preferences based on your requirements, as described in the previous section.

> **Note**
>
> The **Use as default template** check box cannot be deselected when editing the current default display template because there must always be a default one defined in the system.

Remove a 'New Invoice Generated' Display Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Order Received, Wire Transfer Payment Required' Display Template

This message is displayed in the online store after a customer account owner has successfully placed an order for which the payment will be made through wire transfer. The message displays the vendor's details required in order to finalize the payment.

The 'Order Received, Wire Transfer Payment Required' Templates management page\ allows you to:

- View the available Display Templates list.
- Define a new template by clicking the 🗒 Add a display template icon available in the Tools area.
- Search the display templates list using specific criteria.
- Edit an existing template.
- Remove unused display templates.

VoipNow Automation displays the following information about each template:

- Language - The language the notification is written in.
- Name - The notification's descriptive name, in the specific language. Click the link if you want to view/edit the template.
- Last update - The date when the system template was last modified.

> 📝 **Note**
>
> The default display template is highlighted using **bold** characters and cannot be deleted.

Add a New 'Order Received, Wire Transfer Payment Required' Display Template

To add a new template, you must follow the next steps:

1. Fill in the details available in the New Display Template page:

- Display template

    ◦ Language - Use the drop-down list to select the language to be used to display the template in the online store.

    ◦ Default - Select this check box if you want to use this template as the default one. The email templates in English are added in the database, at the first install, as the default email templates. You cannot add more than one template for the same language.

    ◦ Name - The display template title.

    > **Note**
    >
    > When you try to create a new display template, this field is populated with the default subject: **Wire Transfer Payment Details Required to Finalize Order [order_no]**.

    ◦ Template body - The display template content. You can fill in the text you want to be displayed in the online store using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

    - `[order_no]` - It will be replaced with the number of the order placed by the customer account owner from the online store and that must be paid by a wire transfer.

    - `[amount]` - It will be replaced with the amount that must be paid by the wire transfer.

    - `[currency]` - It will be replaced with the currency to be used when making the payment.

    - `[company]` - It will be replaced with the name of the company to which the payment must be made, usually the vendor's.

    - `[bank_name]` - It will be replaced with the name of the bank to which the payment must be made, usually the vendor's.

    - `[bank_account]` - It will be replaced with the bank account number to be used when making the payment, usually the vendor's.

    - `[invoice_url]` - It will be replaced with the URL of the online invoice that has to be paid by wire transfer. The customer account owner can click this link in order to visualize all the details of his purchase.

    - `[vendor_email]` - It will be replaced with the vendor's contact email address specified in his profile that can be used for addressing any queries the customer account owner might have.

> **Note**
>
> The tokens available for this template are displayed as a list. You can click each token if you want to add it to the text.

2. Click Ok to save the changes and create the new template. Click Cancel to return to the previous page without saving the changes.

Edit an 'Order Received, Wire Transfer Payment Required' Display Template

The Edit Display Template page allows you to modify the preferences based on your requirements, as described in the [previous](#) section.

> **Note**
>
> The **Use as default template** check box cannot be deselected when editing the current default display template because there must always be a default one defined in the system.

Remove an 'Order Received, Wire Transfer Payment Required' Display Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Order Received, Check Payment Required' Display Template

This message is displayed in the online store after a customer account owner has successfully placed an order for which the payment will be made through check. The message displays the vendor's details required in order to finalize the payment.

The 'Order Received, Check Payment Required' Templates management page allows you to:

- View the available Display Templates list.
- Define a new template by clicking the [Add a display template](#) icon available in the Tools area.
- Search the display templates list using specific criteria.

- Edit an existing template.

- Remove unused display templates.

VoipNow Automation displays the following information about each template:

- Language - The language the notification is written in.

- Name - The notification's descriptive name, in the specific language. Click the link if you want to view/edit the template.

- Last update - The date when the system template was last modified.

> **Note**
>
> The default display template is highlighted using **bold** characters and cannot be deleted.

Add a New 'Order Received, Check Payment Required' Display Template

To add a new template, you must follow the next steps:

1. Fill in the details available in the New Display Template page:

- Display template

    ◦ Language - Use the drop-down list to select the language to be used to display the template in the online store.

    ◦ Default - Select this check box if you want to use this template as the default one. The email templates in English are added in the database, at the first install, as the default email templates. You cannot add more than one template for the same language.

    ◦ Name - The display template title.

    > **Note**
    >
    > When you try to create a new display template, this field is populated with the default subject: **Check Payment Details Required to Finalize Order [order_no]**.

    ◦ Template body - The display template content. You can fill in the text you want to be displayed in the online store using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- [order_no] - It will be replaced with the number of the order placed by the customer account owner from the online store and that must be paid by check.
- [amount] - It will be replaced with the amount that must be paid by check.
- [currency] - It will be replaced with the currency to be used when making the payment.
- [company] - It will be replaced with the name of the company to which the payment must be made, usually the vendor's.
- [invoice_url] - It will be replaced with the URL of the online invoice that has to be paid by check. The customer account owner can click this link in order to visualize all the details of his purchase.
- [vendor_email] - It will be replaced with the vendor's contact email address specified in his profile that can be used for addressing any queries the customer account owner might have.

> **Note**
>
> The tokens available for this template are displayed as a list. You can click each token if you want to add it to the text.

2. Click Ok to save the changes and create the new template. Click Cancel to return to the previous page without saving the changes.

Edit an 'Order Received, Check Payment Required' Display Template

The Edit Display Template page allows you to modify the preferences based on your requirements, as described in the previous section.

> **Note**
>
> The **Use as default template** check box cannot be deselected when editing the current default display template because there must always be a default one defined in the system.

Remove an 'Order Received, Check Payment Required' Display Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

Searching the Display Templates

When the display templates list is too long and you are searching for specific ones, the following filters can be used:

- Email subject – Use the text box to specify the subject of the email template you are looking for.

- Language - Use the drop-down list to select the language of the email template you are looking for.

Manage Currency Exchange

> **Note**
>
> Access to the **Currencies Management** page is permitted:
>
> - To the **Administrator** user.
>
> - If the number of customer accounts is smaller than the maximum number of customer accounts allowed by the user's license type.

As a system administrator, you can add and manage the currencies supported by the Automation module, as well as by the online store. The currencies can also be used as a preference for a customer account owner billing information, in order to generate invoices in a certain currency. The default currency is the one set up in Automation.

The Currencies Management page allows you to:

- View the Current Currencies list.

- Set up a new currency by clicking the Add a currency icon available in the Toolssection.

- Manage the Currency exchange rates.

- Search the current currencies list using specific criteria.

- Edit an existing currency.

- Remove currencies.

VoipNow Automation displays the following information about each currency set up in the system:

- S - The currency's status:

- ◦ ✅ Enabled
- ◦ ❌ Disabled

  Click this icon to enable/disable a currency.

- Currency - The foreign currency code. Click the currency code to edit it.
- Exchange - The last exchange rate available in the database for the foreign currency in report to the base currency. Between parentheses you can see the date the exchange rate was last updated.
- Store - The available options are Yes and No. Click the link if you want to enable/disable the currency used in store presentations.
- Added - The date and time when the foreign currency was added to the system.

> 📒 **Note**
>
> A currency cannot be removed if is related to an existing order or if it is set as a preference for a customer account's billing information.

Add a New Currency

To add a new foreign currency, fill in the following details:

- Currencies Management
  - ◦ Foreign currency - Use the drop-down list to select the foreign currency you want to add. The list displays all the available currencies.
  - ◦ Exchange rate {currency} - Use the available text box to specify the exchange rate for the chosen currency. The {currency} is the default one, as set up when Automation was first installed.

    > 📒 **Note**
    >
    > The exchange rate is always calculated using the `Base currency/ Foreign currency` formula. For example, if the `Base currency` is EUR and the `Foreign currency` is RON, the exchange rate will be: EURRON . In the financial world, EURRON means EUR/RON.

  - ◦ Update exchange daily - Select this check box if you want the exchange rate to be daily updated.
  - ◦ Active in store - Select this check box if you want the foreign currency to be active in the store as a presentation currency.

You can add/remove multiple foreign currencies using the ➕➖ buttons.

> 📝 **Note**
>
> You cannot add the same currency twice, with different exchange rates. Therefore, if you accidentally have the same currency more than once, but with different exchange rates, only the last one added will be considered.

Click Ok to add the new foreign currencies. Click Cancel to return to the previous page without saving them.

Edit a Currency

When you want to modify a foreign currency, use the controls grouped in the Currency Management fieldset.

> 📝 **Note**
>
> For more information, see the [Add a New Currency](#) section.

Remove a Currency

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

Manage Currency Exchange Rates

This section offers you the possibility to track down the exchange rates of all the used currencies and to update the rates for the currently used ones.

The Currency Exchange Rates History management page allows you to:

- View the Historical Rates Overview.
- 🔃 Automatically update rates.

  The exchange rates are automatically updated on a daily basis, but if you want to update them at a certain point, you can do so by clicking this icon. A message will be displayed to inform you that the process has been initialized:

  `Currencies will be updated shortly. This process might take several minutes.`

VoipNow Automation displays the following information about each exchange rate:

- Foreign currency - The currency code.

- Exchange - The specific foreign currency's exchange rate, related to the current base currency.

- Valid on - The date when the exchange rate was valid.

- Updated - The date and time when the exchange rate was last updated.

By default, VoipNow Automation displays the last results for each currency in the system, ordered by date (from the newest to the oldest).

Searching the Historical Rates List

When you are searching for exchange rates of certain currencies, for a specific period, you can use one or more of the available filters:

Search rates between {date_1} and {date_2} for currency {currency}, where:

- {date_1} - Use the available text box or the calendar button to specify the lower limit of the time interval in which you want to search for the exchange rates. The default value is the 1st of the current month. The date format must be yyyy-mm-dd.

- {date_2} - Use the available text box or the calendar button to specify the upper limit of the time interval in which you want to search for the exchange rates. The default value is the current date. The date format must be yyyy-mm-dd.

- {currency} - Use the drop-down list to select the currency for which you want to see the historical exchange rates.

Manage Taxes

> **Note**
>
> Access to the **Tax Management** page is permitted:
>
> - To the **Administrator** user.
>
> - If the number of customer accounts is smaller than the maximum number of customer accounts allowed by the user's license type.

As a system administrator, you can manage the taxes applied to the orders. Taxes are percent and are applied based on the customer account owner's country/region.

The Taxes Management page allows you to:

- View the Taxes List.

- Set up a new tax by clicking the 📊 [Add taxes](#) icon available in the Tools section.

- Search the taxes list using specific criteria.

- Edit an existing tax.

- Remove unused taxes.

VoipNow Automation displays the following information about each tax:

- S - The tax status:
  - ☑ Enabled
  - ❌ Disabled

  Click this icon to enable/disable the tax.

- Country - The country using this tax.

- Region - The country's region using this tax.

> 📝 **Note**
>
> If the tax is applicable to the whole country, then this field displays '-'.

- Tax - The tax value in percents.

- Created - The date and time when the tax was created.

- Updated - The date and time when the tax was last modified.

> 📝 **Note**
>
> When removing taxes, a warning box pops up, displaying the following message:
>
> ```
> Once a Tax is deleted, it is no longer applied to the invoices
> generated afterwards for customer accounts with Billing Address
> in this Country/Region. If you do not want to do this, cancel
> now.
> ```

Add a New Tax

To add a new tax, fill in the following information:

- Taxes
  - Tax - Use the available text box to specify the tax value, in percents.
  - Applies to country - Use the drop-down list to select the country for which the tax will be used.

    > **Note**
    >
    > If the selected country has no regions, then the following fields will be disabled.

  - Apply tax to all regions - Select this check box if you want the tax to be used for all the country's regions.

    > **Note**
    >
    > If you select this check box, but you already have taxes defined for the selected country, a confirmation alert will be displayed to confirm the removal of the previous records for that country.

    > **Note**
    >
    > If you select this check box, then the following field will be disabled.

  - Applies to state/province - Use the drop-down to select the country's region to which the tax will be applied.

    You can select/remove multiple regions using the ⊞ ⊟ buttons.

Click Ok to save the new tax. Click Cancel to return to the previous page without saving it.

Edit a Tax

In order to edit a tax for a specific country or region, you have to add a new tax with the desired changes. The new record will overwrite the previous tax.

For more details about how to add a new tax, see the [Add a New Tax](#) section.

Platform Plug-ins

This page offers you an overview of all the platform plug-ins available in the system. A plug-in is structured so that it contains all the resources required by a specific platform to function. These resources represent the configurable templates. Each platform plug-in defines an item family, specific to that platform, whose items can be designed using the platform bricks.

Currently, VoipNow Automation supports only one platform, VoipNow Professional account. Using this platform plug-in, you can configure all the components, like user accounts, charging plans, time intervals or free minutes packages, required to provide VoipNow Professional services.

VoipNow Automation displays the following information about each platform plug-in:

- S - The platform plug-in status:
  - ◦ 🔷 Active
  - ◦ 🔷 Suspended

  Click this icon to change the platform plug-in's status.

  > 📝 **Note**
  >
  > A platform plug-in cannot be disabled if there is at least one item available in the online store using it.

  > ⚠️ **Caution**
  >
  > You cannot disable all the platform plug-ins! At least one must remain active.

- Name - The platform plug-in's descriptive name. Clicking this link will open the Platform Plug-in Management page that allows you to configure the cloud building bricks and the email templates specific to the chosen plug-in.

- UID - The platform plug-in's Unique Identifier.

- Layers - This column displays the platform plug-in's standalone layers, those that are exposed in VoipNow Automation. The total number of available cloud building bricks is displayed for each layer.

- Configured - The date the platform plug-in was configured.

Manage the Platform Plug-in

Each platform plug-in can be customized from its own management page that provides access to all the required cloud building bricks and email templates. These bricks are the composing elements of every plug-in and are used to configure it according to the platform specific. They 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.

The Platform Plug-in Management page allows you to:

- View the Cloud Building Bricks for all the supported platform plug-ins.

> **Note**
>
> For the moment, only the **VoipNow Professional account** platform plug-in is available and therefore only its cloud building bricks are displayed in this list.

- Search for specific cloud building bricks.
- Manage all the Items defined for a certain cloud building brick.
- Add new items.
- Manage all the email notifications triggered by plug-in events by clicking the ✉ [Email templates](#) icon available in the Tools section.

VoipNow Automation displays the following information about the platform plug-in bricks:

- M - The platform plug-in brick's type, based on its functionality:
  - ▦ Standalone main platform plug-in brick
  - 🧩 Add-on platform plug-in brick
  - ▦ Resource platform plug-in brick
- Name - The cloud building brick's name. It defines the functionality of the templates that can be later added. For example, using a `Reseller account` brick, you can define a new template for a personalized VoipNow Professional reseller that can be later purchased from the online store and deployed.
- Layer - The platform plug-in's cloud building brick categories.

> **Note**
>
> For the **VoipNow Professional account** platform plug-in, the following layers are available:
>
> ◦ **Accounts** - This layer contains the following cloud building bricks:
>
> ▪ `Reseller account` - The templates you can add for this brick design a reseller account's permissions and limits.
>
> ▪ `Client account` - The templates you can add for this brick design a client account's permissions and limits.
>
> ▪ `Extension account` - The templates you can add for this brick design an extension account's permissions and limits.
>
> ◦ **Time intervals** - This layer contains the following cloud building brick:
>
> ▪ `Time interval` - The templates you can add for this brick design time intervals that can be used at creating charging plans.
>
> ◦ **Charging plans** - This layer contains the following cloud building bricks:
>
> ▪ `Prepaid charging plan` - The templates you can add for this brick design a prepaid charging plan's fees, permissions and charging segments that may be applied to reseller, client or extension accounts.
>
> ▪ `Postpaid charging plan` - The templates you can add for this brick design a postpaid charging plan's fees, permissions and charging segments that may be applied to reseller, client or extension accounts.
>
> ▪ `Charging credit` - The templates you can add for this brick design a recharge credit for accounts with prepaid charging plan's fees.
>
> ◦ **Free minutes packages** - This layer contains the following cloud building brick:
>
> ▪ `Free minutes package` - The templates you can add for this brick allow you to provide bonuses, free minutes, that can be later used by the accounts.
>
> ◦ **Destination exceptions** - This layer contains the following cloud building bricks:
>
> ▪ `Fixed charging destination exception` - The templates that you can add for this brick design special cost algorithms for calls initiated to certain area codes. This brick can be used only for the charging plans with the **Fixed prices** charging method enabled.
>
> ▪ `Relative charging destination exception` - The templates that you can add for this brick design special cost algorithms for calls initiated

to certain area codes can be designed. This brick can be used only for the charging plans with the **Relative to call cost** charging method enabled.

◦ **Account limits** - This layer contains the following cloud building bricks:

▪ `Reseller limits` - The templates you can add for this brick can be used to modify the permissions and limits of any existing, standalone, reseller account. This brick is very useful when a customer purchased an account that supports, for example, only `3 Phone terminal` extensions and now requires other `2`. The solution is to simply set up an appropriate template with the **Maximum number of phone extensions** set to `5` and to later deploy it as an add-on from the **Orders Deployment Management** page.

▪ `Client limits` - The templates you can add for this brick can be used to modify the permissions and limits of any existing, standalone, client account. This brick is very useful when a customer purchased an account that supports, for example, only `3 Phone terminal` extensions and now requires other `2`. The solution is to simply set up an appropriate template with the **Maximum number of phone extensions** set to `5` and to later deploy it as an add-on from the **Orders Deployment Management** page.

• Type - The layer's type that defines its functionality. A platform plug-in can be structured in standalone layers, in layers whose bricks are required by other ones and that cannot be used directly in the platform.

Note

For the **VoipNow Professional account** platform plug-in, the following 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**

▪ **Charging plans**

◦ **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 (both fixed and relative)** - Also used by the cloud building bricks belonging to the **Charging plans** layer.
>
> ◦ **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**

- Platform plug-in - The name of the platform plug-in the brick belongs to.

- Items - This multi-purpose column displays the number of templates currently available for the specific cloud building brick and allows you to manage them by clicking the View all link.

Reseller accounts

This pop-up panel displays a list of all the templates defined for the **Reseller account** cloud building brick. You can remove, edit or enable/disable existing templ

Reseller Accounts List

	🔍 Search ☰ Show all		✖ Remove selec

S	Name ▲	Used in	Updated
✅	Foo Inc.	1 item(s) | 0 template(s)	Mar 14, 201
✅	SuperCorp Inc.	3 item(s) | 0 template(s)	Mar 01, 201

2 template(s)	Number of entries per page: 10 2!

The templates defined for the reseller account brick

The pop-up panel displays the following information:

◦ S - The template's status:

> ▪ ✅ Active
>
> ▪ ❌ Suspended

Click this icon to change the template's status.

◦ Name - The template's descriptive name. Click this link to modify its settings. Details on how to edit particular templates are given in the corresponding areas from the Cloud Building Bricks Management section, specific to each brick.

◦ Used in - The number of configured items and the number of standalone templates that are currently using this template.

○ Updated - The date the template was last modified.

> **Note**
>
> Note that you can delete only those templates that are not used by any item available in the online store or by any other template.

- Last item created - The date the last template was added to the cloud building brick.
- Add item - Click the New link if you want to add a new template to the cloud building brick. Details on how to add particular templates are given in the corresponding areas of the Cloud Building Bricks Management section, specific to each brick.

Searching the Platform's Cloud Building Bricks List

When you are searching for specific platform cloud building bricks, you can use one of the available filters:

- Layer - Use the drop-down list to select the layer the building bricks you are looking for belong to. By default, All the layers are displayed.
- Type - Use the drop-down list to select the layer type the building bricks you are looking for belong to. By default, All the layers are displayed.
- Platform plug-in - You can use this drop-down list to choose the platform the bricks your are looking for belong to. By default, All the platforms are displayed.

> **Note**
>
> For the moment, only the **VoipNow Professional account** platform plug-in is available.

The Platform Plug-in's Email Templates

The Plug-In Email Templates Management page allows you to configure the notifications specific to the selected platform plug-in.

The email templates displayed in this page are used by all the plug-ins, but their content differs depending on the platform's requirements.

The text of the notifications can be customized and new notifications can be added for any type of event by clicking the Edit link available in the Text column. The system can be also set up to send only some notifications and only to certain users.

> **Note**
>
> For more information about the controls available in this page, see the [Manage the Email Templates](#) section.

The platform plug-in email notifications are grouped, based on their utilization, into the following categories:

- Order Deployment Notification Email Templates - This category contains the templates required by order deployment related events:
  - [The 'Order Deployment Successful Notification' Template](#)
  - [The 'Order Deployment Report Notification' Template](#)
  - [The 'Slave Accounts Successful Deployment Notification' Template](#)
  - [The 'Add-on product instances Successful Deployment Notification' Template](#)
- Service notification email templates - This category contains the templates required by order deployment related events like service suspension, reactivation or termination:
  - [The 'Service(s) Suspension Notification' Template](#)
  - [The 'Service(s) Reactivation Notification' Template](#)
  - [The 'Service(s) Termination Notification' Template](#)
  - [The 'Activate/Suspend Report Notification' Template](#)

The 'Order Deployment Successful Notification' Templates

This notification is sent when the deployment scheduled task has successfully deployed an ordered item. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'Order Deployment Successful Notification' Templates management page, click the [Edit](#) link available in the Text column.

The 'Order Deployment Successful Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.

- Search the email templates list using specific criteria.

- Add a new email template.

- Edit an existing email template.

- Remove email templates.

You can add a new template by clicking the 📝 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.

- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the Edit an 'Order Deployment Success Notification' Email Template section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Order Deployment Successful Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ➕ ➖ icons.

     ◦ Language - Use the drop-down list to select the notification language.

○ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

> ⚠ Caution
>
> Only one template can be added for each language!

○ Encoding - Use the drop-down list to select the email template type:

- Text

- HTML

○ Email subject - Use the available text box to specify the email template title.

> 📒 Note
>
> When you try to create a new email template, this field is populated with the default subject: **Service(s) Successfully Deployed!**.

○ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- [recipient_name] - It will be replaced with the name of the person receiving the notification.

- [autotask_rundate] - It will be replaced with the date when the scheduled task was executed.

> 📒 Note
>
> Scheduled task example: 45 6 * * * command to be executed
>
> The command will be run at 6:45 every day of the week, all the month.

- [repeat src=order] - This command is used when a customer account owner has more than one orders with services that have been automatically deployed. All the deployed services belonging to a certain order are grouped in this block. The details that will be displayed for each order are the ones available until the [/repeat] command.

- [order_no] - It will be replaced with the number of the order the deployed services belong to.

- `[repeat src=prinstance_deployed]` - This command is used when there is more than one automatically deployed master service instance belonging to the same order. The details that will be displayed for each service instance are the ones available until the `[/repeat]` command.

- `[product_name]` - It will be replaced with the deployed service instance descriptive name.

- `[prinstance_deployed_date]` - It will be replaced with the date the service instance was deployed.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the service instance was deployed. The customer account owner may click on it in order to access the service.

- `[deployment_login]` - It will be replaced with the username required to connect to the deployed service instance.

- `[deployment_password]` - It will be replaced with the password required to connect to the deployed service instance.

- `[deployment_companyname]` - It will be replaced with the company name specified for the service instance that had just been deployed.

- `[deployment_contactname]` - It will be replaced with the contact name specified for the service instance that had just been deployed.

- `[deployment_contactphone]` - It will be replaced with the contact phone number specified for the service instance that had just been deployed.

- `[deployment_contactfax]` - It will be replaced with the contact fax number specified for the service instance that had just been deployed.

- `[deployment_contactaddress]` - It will be replaced with the contact postal address specified for the service instance that had just been deployed.

- `[deployment_contactemail]` - It will be replaced with the contact email address specified for the service instance that had just been deployed.

- `[deployment_contactcity]` - It will be replaced with the city specified for the service instance that had just been deployed.

- `[deployment_contactstate]` - It will be replaced with the state specified for the service instance that had just been deployed.

- `[deployment_contactcountry]` - It will be replaced with the country specified for the service instance that had just been deployed.

- [deployment_contactzip] - It will be replaced with the postal code specified for the service instance that had just been deployed.

- [deployment_DID_no] - It will be replaced with the number of Direct Inward Dialing numbers assigned to the deployed service instance.

- [prinstance_DID_no] - It will be replaced with the total number of available Direct Inward Dialing numbers.

- [repeat   src=prinstance_deployed_slave] - This command is used when there is more than one automatically independent slave deployed service instance belonging to the same order. The details that will be displayed for each service instance are the ones available until the [/repeat] command.

- [product_name] - It will be replaced with the deployed service instance descriptive name.

- [prinstance_deployed_date] - It will be replaced with the date the service instance was deployed.

- [deployment_login] - It will be replaced with the username required to connect to the deployed service instance.

- [deployment_password] - It will be replaced with the password required to connect to the deployed service instance.

- [deployment_DID_no] - It will be replaced with the number of Direct Inward Dialing numbers assigned to the deployed service instance.

- [prinstance_DID_no] - It will be replaced with the total number of available Direct Inward Dialing numbers.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed_slave]).

- [repeat src=prinstance_deployed_addon] - This command is used when there is more than one automatically independent add-on deployed service instance belonging to the same order. The details that will be displayed for each service instance are the ones available until the [/repeat] command.

- [product_name] - It will be replaced with the deployed service instance descriptive name.

- [prinstance_deployed_date] - It will be replaced with the date the service instance was deployed.

- [if is_recharge] - This command is used to make a distinction between what add-on type was actually deployed, in this case a recharge (supplementary outgoing and incoming calls credit). The

details that will be displayed for each recharge are the ones available until the `[/if]` command.

- `[credit_outgoing_amount]` - It will be replaced with the outgoing calls credit required to recharge the deployed service instance.

- `[credit_incoming_amount]` - It will be replaced with the incoming calls credit required to recharge the deployed service instance.

- `[/if]` - This command marks the ending of the blocks previously defined (`[if is_recharge]`).

- `[if  is_reseller_limit]` - This command is used to make a distinction between what add-on type was actually deployed, in this case extra permissions and limits for a reseller account (increased limits and enabled permissions). The details that will be displayed for each modification are the ones available until the `[/if]` command.

- `[repeat src=reseller_permissions]` - This command is used when there is more than one permission that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the `[/repeat]` command.

- `[permission_name]` - It will be replaced with the permission that was modified.

- `[permission_value]` - It will be replaced with the new value for the permission (enabled or disabled).

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=reseller_permissions]`).

- `[repeat src=reseller_limits]` - This command is used when there is more than one limit that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the `[/repeat]` command.

- `[limit_name]` - It will be replaced with the permission that was modified.

- `[limit_value]` - It will be replaced with the new value for the limit.

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=reseller_limits]`).

- `[/if]` - This command marks the ending of the blocks previously defined (`[if is_reseller_limit]`).

- `[if is_client_limit]` - This command is used to make a distinction between what add-on type was actually deployed, in this case extra permissions and limits for a client account (increased limits and

enabled permissions). The details that will be displayed for each modification are the ones available until the `[/if]` command.

- `[repeat src=client_permissions]` - This command is used when there is more than one permission that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the `[/repeat]` command.

- `[permission_name]` - It will be replaced with the permission that was modified.

- `[permission_value]` - It will be replaced with the new value for the permission (enabled or disabled).

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=client_permissions]`).

- `[repeat src=client_limits]` - This command is used when there is more than one limit that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the `[/repeat]` command.

- `[limit_name]` - It will be replaced with the permission that was modified.

- `[limit_value]` - It will be replaced with the new value for the limit.

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=client_limits]`).

- `[/if]` - This command marks the ending of the blocks previously defined (`[if is_client_limit]`).

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=prinstance_deployed_addon]`).

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=prinstance_deployed]`).

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=order]`).

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Order Deployment Successful Notification' Email Template

You can edit the Order Deployment Successful Notification template by clicking its [name](#) available in the Subject column of the `Email Templates`

table. The page that will open is identical with the Configure the New Email Template page described in the [Add a New 'Order Deployment Successful Notification' Email Template](#) section.

Remove an 'Order Deployment Successful Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Slave Accounts Successful Deployment Notification' Templates

This notification is sent when the deployment scheduled task has successfully deployed a slave account from a bundle item which could not be previously deployed. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'Slave Accounts Successful Deployment Notification' Templates management page, click the [Edit](#) link available in the Text column.

The 'Slave Accounts Successful Deployment Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the ⏏ Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the [Edit an 'Slave Accounts Successful Deployment Notification' Email Template](#) section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Slave Accounts Successful Deployment Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       > ⚠ **Caution**
       >
       > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ `Text`

       ▪ `HTML`

     ◦ Email subject - Use the available text box to specify the email template title.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- [recipient_name] - It will be replaced with the name of the person receiving the notification.

- [autotask_rundate] - It will be replaced with the date when the scheduled task was executed.

- [repeat src=order] - This command is used when a customer account owner has more than one orders with services that have been automatically deployed. All the deployed services belonging to a certain order are grouped in this block. The details that will be displayed for each order are the ones available until the [/repeat] command.

- [order_no] - It will be replaced with the number of the order the deployed services belong to.

- [repeat src=prinstance_deployed] - This command is used when there is more than one automatically deployed slave service instance belonging to the same order. The details that will be displayed for each service instance are the ones available until the [/repeat] command.

- [product_name] - It will be replaced with the deployed service instance descriptive name.

- [master_product_name] - It will be replaced with the master service instance descriptive name to which the slave belongs to.

- [prinstance_deployed_date] - It will be replaced with the date the service instance was deployed.

- [deploymentserver_url] - It will be replaced with the URL address of the server where the service instance was deployed. The customer account owner may click on it in order to access the service.

- [deployment_login] - It will be replaced with the username required to connect to the deployed service instance.

- [deployment_password] - It will be replaced with the password required to connect to the deployed service instance.

- [deployment_companyname] - It will be replaced with the company name specified for the service instance that had just been deployed.

- [deployment_contactname] - It will be replaced with the contact name specified for the service instance that had just been deployed.

- [deployment_contactphone] - It will be replaced with the contact phone number specified for the service instance that had just been deployed.

- [deployment_contactfax] - It will be replaced with the contact fax number specified for the service instance that had just been deployed.

- [deployment_contactaddress] - It will be replaced with the contact postal address specified for the service instance that had just been deployed.

- [deployment_contactemail] - It will be replaced with the contact email address specified for the service instance that had just been deployed.

- [deployment_contactcity] - It will be replaced with the city specified for the service instance that had just been deployed.

- [deployment_contactstate] - It will be replaced with the state specified for the service instance that had just been deployed.

- [deployment_contactcountry] - It will be replaced with the country specified for the service instance that had just been deployed.

- [deployment_contactzip] - It will be replaced with the postal code specified for the service instance that had just been deployed.

- [deployment_DID_no] - It will be replaced with the number of Direct Inward Dialing numbers assigned to the deployed service instance.

- [prinstance_DID_no] - It will be replaced with the total number of available Direct Inward Dialing numbers.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed]).

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=order]).

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to

send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Slave Accounts Successful Deployment Notification' Email Template

You can edit the Slave Accounts Successful Deployment Notification template by clicking its [name](#) available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the [Add a New 'Slave Accounts Successful Deployment Notification' Email Template](#) section.

Remove an 'Slave Accounts Successful Deployment Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Add-on Product Instances Successful Deployment Notification' Templates

This notification is sent when the deployment scheduled task has successfully deployed an add-on which could not be previously deployed. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'Add-on Product Instances Successful Deployment Notification' Templates management page, click the [Edit](#) link available in the Text column.

The 'Add-on Product Instances Successful Deployment Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.

- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the [Edit an 'Add-on Product Instances Successful Deployment Notification' Email Template](#) section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Add-on Product Instances Successful Deployment Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

     > ⚠ **Caution**
     >
     > Only one template can be added for each language!

◦ Encoding - Use the drop-down list to select the email template type:

  ▪ Text

  ▪ HTML

◦ Email subject - Use the available text box to specify the email template title.

> **Note**
>
> When you try to create a new email template, this field is populated with the default subject: **Service(s) Successfully Deployed!**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

  ▪ `[recipient_name]` - It will be replaced with the name of the person receiving the notification.

  ▪ `[autotask_rundate]` - It will be replaced with the date when the scheduled task was executed.

  > **Note**
  >
  > Scheduled task example: `45 6 * * * command to be executed`
  >
  > The command will be run at 6:45 every day of the week, all the month.

  ▪ `[repeat src=order]` - This command is used when a customer account owner has more than one orders with services that have been automatically deployed. All the deployed services belonging to a certain order are grouped in this block. The details that will be displayed for each order are the ones available until the `[/repeat]` command.

  ▪ `[order_no]` - It will be replaced with the number of the order the deployed services belong to.

  ▪ `[repeat src=prinstance_deployed]` - This command is used when there is more than one automatically deployed slave service instance belonging to the same order. The details that will be displayed for each service instance are the ones available until the `[/repeat]` command.

  ▪ `[product_name]` - It will be replaced with the deployed service instance descriptive name.

  ▪ `[master_product_name]` - It will be replaced with the master service instance descriptive name to which the slave belongs to.

- [prinstance_deployed_date] - It will be replaced with the date the service instance was deployed.

- [deploymentserver_url] - It will be replaced with the URL address of the server where the service instance was deployed. The customer account owner may click on it in order to access the service.

- [if is_recharge] - This command is used to make a distinction between what add-on type was actually deployed, in this case a recharge (supplementary outgoing and incoming calls credit). The details that will be displayed for each recharge are the ones available until the [/if] command.

- [credit_outgoing_amount] - It will be replaced with the outgoing calls credit required to recharge the deployed service instance.

- [credit_incoming_amount] - It will be replaced with the incoming calls credit required to recharge the deployed service instance.

- [/if] - This command marks the ending of the blocks previously defined ([if is_recharge]).

- [if is_reseller_limit] - This command is used to make a distinction between what add-on type was actually deployed, in this case extra permissions and limits for a reseller account (increased limits and enabled permissions). The details that will be displayed for each modification are the ones available until the [/if] command.

- [repeat src=reseller_permissions] - This command is used when there is more than one permission that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the [/repeat] command.

- [permission_name] - It will be replaced with the permission that was modified.

- [permission_value] - It will be replaced with the new value for the permission (enabled or disabled).

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=reseller_permissions]).

- [repeat src=reseller_limits] - This command is used when there is more than one limit that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the [/repeat] command.

- [limit_name] - It will be replaced with the permission that was modified.

- [limit_value] - It will be replaced with the new value for the limit.

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=reseller_limits]`).

- `[/if]` - This command marks the ending of the blocks previously defined (`[if is_reseller_limit]`).

- `[if is_client_limit]` - This command is used to make a distinction between what add-on type was actually deployed, in this case extra permissions and limits for a client account (increased limits and enabled permissions). The details that will be displayed for each modification are the ones available until the `[/if]` command.

- `[repeat src=client_permissions]` - This command is used when there is more than one permission that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the `[/repeat]` command.

- `[permission_name]` - It will be replaced with the permission that was modified.

- `[permission_value]` - It will be replaced with the new value for the permission (enabled or disabled).

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=client_permissions]`).

- `[repeat src=client_limits]` - This command is used when there is more than one limit that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the `[/repeat]` command.

- `[limit_name]` - It will be replaced with the permission that was modified.

- `[limit_value]` - It will be replaced with the new value for the limit.

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=client_limits]`).

- `[/if]` - This command marks the ending of the blocks previously defined (`[if is_client_limit]`).

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=prinstance_deployed]`).

- `[/repeat]` - This command marks the ending of the blocks previously defined (`[repeat src=order]`).

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Slave Accounts Successful Deployment Notification' Email Template

You can edit the Slave Accounts Successful Deployment Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Slave Accounts Successful Deployment Notification' Email Template section.

Remove an 'Slave Accounts Successful Deployment Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Order Deployment Report Notification' Templates

This notification is sent every time the report is run. The purpose of the task is to deploy all the services enqueued for deployment. The time frame when this task is ran can be set in the scheduled task's script. By default, the task is ran daily every 10 minutes. The notification can be sent to the administrator (default) or to another custom email address.

To access the 'Order Deployment Report Notification' Templates management page, click the Edit link available in the Text column.

The 'Order Deployment Report Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the ⬛ Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.

- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the [Edit a 'Order Deployment Report Notification' Email Template](#) section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.

- Last update - The date when the email template was last modified.

- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Order Deployment Report Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ▭ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

     > ⚠ **Caution**
     >
     > Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ `Text`

       ▪ `HTML`

◦ Email subject - Use the available text box to specify the email template title.

> **Note**
>
> When you try to create a new email template, this field is populated with the default subject: **[automation_apptitle] Deployment Task Report**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

▪ `[recipient_name]` - It will be replaced with the name of the person receiving the notification.

▪ `[autotask_rundate]` - It will be replaced with the date when the scheduled task was executed.

> **Note**
>
> Scheduled task example: `*/10 * * * * command to be executed`
>
> The command will be run every 10 minutes, every day of the week, all the month.

▪ `[automation_apptitle]` - It will be replaced with the personalized application name, as set up by the user.

▪ `[prinstance_deploytask_no]` - It will be replaced with the total number of master services the scheduled task tried to automatically deploy.

▪ `[prinstance_deploytask_slave_no]` - It will be replaced with the total number of independent slave services the scheduled task tried to automatically deploy.

▪ `[prinstance_deploytask_addon_no]` - It will be replaced with the total number of independent add-on services the scheduled task tried to automatically deploy.

▪ `[prinstance_deployed_no]` - It will be replaced with the total number of successfully deployed master services.

▪ `[prinstance_deployed_partial_no]` - It will be replaced with the number of partially successfully deployed master services: either slave accounts or add-ons could not be deployed.

▪ `[prinstance_deployed_slave_no]` - It will be replaced with the total number of successfully deployed independent slave services.

- [prinstance_deployed_addon_no] - It will be replaced with the total number of successfully deployed independent add-on services.

- [prinstance_deployed_fail_no] - It will be replaced with the total number of master services that could not be automatically deployed due to a specific error.

- [prinstance_deployed_fail_slave_no] - It will be replaced with the total number of independent slave services that could not be automatically deployed due to a specific error.

- [prinstance_deployed_fail_addon_no] - It will be replaced with the total number of independent add-on services that could not be automatically deployed due to a specific error.

- [repeat src=deploymentserver_deploy_success] - This command is used when there is more than one service instance that has been successfully deployed on more than one deployment servers. The system administrator will receive a notification with all the deployed services, grouped for each provisioning server in this situation. The details that will be displayed for every provisioning server are the ones available until the [/repeat] command.

- [prinstance_deployed_perserver_no] - It will be replaced with the total number of services that have been automatically deployed on the provisioning server.

- [deploymentserver_url] - It will be replaced with the URL address of the deployment server the services have been deployed to. The customer account owner may click this link to access the server.

- [repeat src=prinstance_deployed_detail] - This command is used when there are more than one master services that have been automatically deployed on a provisioning server. The system administrator will receive a notification with all the deployed services. The details that will be displayed for each instance are the ones available until the [/repeat] command.

- [product_name] - It will be replaced with the descriptive name of the service instance that could not be automatically deployed.

- [order_no] - It will be replaced with the number of the order the service instance belongs to.

- [deployment_login] - It will be replaced with the username required to connect to the deployed service..

- [deployment_password] - It will be replaced with the password required to connect to the deployed service.

- `[deployment_companyname]` - It will be replaced with the contact email address specified for the service that had just been deployed.

- `[deployment_contactname]` - It will be replaced with the contact name specified for the service that had just been deployed.

- `[deployment_contactphone]` - It will be replaced with the contact phone number specified for the service that had just been deployed.

- `[deployment_contactemail]` - It will be replaced with the contact email address specified for the service that had just been deployed.

- `[deployment_DID_no]` - It will be replaced with the number of Direct Inward Dialing numbers assigned to the deployed service instance.

- `[prinstance_DID_no]` - It will be replaced with the total number of available Direct Inward Dialing numbers.

- `[repeat src=prinstance_deployed_slave]` - This command is used when there is more than one slave service instance that has been successfully deployed on more than one deployment servers. The details that will be displayed for every provisioning server are the ones available until the `[/repeat]` command.

- `[product_name]` - It will be replaced with the descriptive name of the service instance that could not be automatically deployed.

- `[prinstance_deployed_date]` - It will be replaced with the date the server instance was deployed.

- `[deployment_login]` - It will be replaced with the username required to connect to the deployed service..

- `[deployment_password]` - It will be replaced with the password required to connect to the deployed service.

- `[deployment_DID_no]` - It will be replaced with the number of Direct Inward Dialing numbers assigned to the deployed service instance.

- `[prinstance_DID_no]` - It will be replaced with the total number of available Direct Inward Dialing numbers.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed_slave]).

- `[repeat src=prinstance_deployed_addon]` - This command is used when there is more than one add-on service instance that has been successfully deployed on more than one deployment servers. The details that will be displayed for every provisioning server are the ones available until the `[/repeat]` command.

- [product_name] - It will be replaced with the descriptive name of the service instance that could not be automatically deployed.

- [prinstance_deployed_date] - It will be replaced with the date the server instance was deployed.

- [credit_outgoing_amount] - It will be replaced with the outgoing calls credit required to recharge the deployed service instance.

- [credit_incoming_amount] - It will be replaced with the incoming calls credit required to recharge the deployed service instance.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed_addon]).

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed_detail]).

- [repeat src=deploymentserver_deploy_slave_success] - This command is used when there is more than one independent slave service instance that has been successfully deployed on more than one deployment servers. The details that will be displayed for every provisioning server are the ones available until the [/repeat] command.

- [prinstance_deployed_perserver_no] - It will be replaced with the total number of services that have been automatically deployed on the provisioning server.

- [deploymentserver_url] - It will be replaced with the URL address of the deployment server the services have been deployed to. The customer account owner may click this link to access the server.

- [repeat src=prinstance_deployed_detail] - This command is used when there are more than one independent slave services that have been automatically deployed on a provisioning server. The system administrator will receive a notification with all the deployed services. The details that will be displayed for each instance are the ones available until the [/repeat] command.

- [product_name] - It will be replaced with the descriptive name of the service instance that could not be automatically deployed.

- [master_product_name] - It will be replaced with the descriptive name of the master service instance to which the slave belongs to.

- [order_no] - It will be replaced with the number of the order the service instance belongs to.

- [deployment_login] - It will be replaced with the username required to connect to the deployed service..

- [deployment_password] - It will be replaced with the password required to connect to the deployed service.

- [deployment_companyname] - It will be replaced with the contact email address specified for the service that had just been deployed.

- [deployment_contactname] - It will be replaced with the contact name specified for the service that had just been deployed.

- [deployment_contactphone] - It will be replaced with the contact phone number specified for the service that had just been deployed.

- [deployment_contactemail] - It will be replaced with the contact email address specified for the service that had just been deployed.

- [deployment_DID_no] - It will be replaced with the number of Direct Inward Dialing numbers assigned to the deployed service instance.

- [prinstance_DID_no] - It will be replaced with the total number of available Direct Inward Dialing numbers.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed_detail]).

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=deploymentserver_deploy_slave_success]).

- [repeat src=deploymentserver_deploy_addon_success] - This command is used when there is more than one independent add-on service instance that has been successfully deployed on more than one deployment servers. The details that will be displayed for every provisioning server are the ones available until the [/repeat] command.

- [prinstance_deployed_perserver_no] - It will be replaced with the total number of services that have been automatically deployed on the provisioning server.

- [deploymentserver_url] - It will be replaced with the URL address of the deployment server the services have been deployed to. The customer account owner may click this link to access the server.

- [repeat src=prinstance_deployed_detail] - This command is used when there are more than one independent add-on services that have been automatically deployed on a provisioning server. The system administrator will receive a notification with all the deployed services. The details that will be displayed for each instance are the ones available until the [/repeat] command.

- [product_name] - It will be replaced with the descriptive name of the service instance that could not be automatically deployed.

- [master_product_name] - It will be replaced with the descriptive name of the master service instance to which the slave belongs to.

- [order_no] - It will be replaced with the number of the order the service instance belongs to.

- [if is_recharge] - This command is used to make a distinction between what add-on type was actually deployed, in this case a recharge (supplementary outgoing and incoming calls credit). The details that will be displayed for each recharge are the ones available until the [/if] command.

- [credit_outgoing_amount] - It will be replaced with the outgoing calls credit required to recharge the deployed service instance.

- [credit_incoming_amount] - It will be replaced with the incoming calls credit required to recharge the deployed service instance.

- [/if] - This command marks the ending of the blocks previously defined ([if is_recharge]).

- [if is_reseller_limit] - This command is used to make a distinction between what add-on type was actually deployed, in this case extra permissions and limits for a reseller account (increased limits and enabled permissions). The details that will be displayed for each modification are the ones available until the [/if] command.

- [repeat src=reseller_permissions] - This command is used when there is more than one permission that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the [/repeat] command.

- [permission_name] - It will be replaced with the permission that was modified.

- [permission_value] - It will be replaced with the new value for the permission (enabled or disabled).

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=reseller_permissions]).

- [repeat src=reseller_limits] - This command is used when there is more than one limit that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the [/repeat] command.

- [limit_name] - It will be replaced with the permission that was modified.

- [limit_value] - It will be replaced with the new value for the limit.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=reseller_limits]).

- [/if] - This command marks the ending of the blocks previously defined ([if is_reseller_limit]).

- [if is_client_limit] - This command is used to make a distinction between what add-on type was actually deployed, in this case extra permissions and limits for a client account (increased limits and enabled permissions). The details that will be displayed for each modification are the ones available until the [/if] command.

- [repeat src=client_permissions] - This command is used when there is more than one permission that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the [/repeat] command.

- [permission_name] - It will be replaced with the permission that was modified.

- [permission_value] - It will be replaced with the new value for the permission (enabled or disabled).

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=client_permissions]).

- [repeat src=client_limits] - This command is used when there is more than one limit that will be modified with this add-on. The details that will be displayed for each add-on are the ones available until the [/repeat] command.

- [limit_name] - It will be replaced with the permission that was modified.

- [limit_value] - It will be replaced with the new value for the limit.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=client_limits]).

- [/if] - This command marks the ending of the blocks previously defined ([if is_client_limit]).

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed_detail]).

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=deploymentserver_deploy_addon_success]).

- [repeat src=deploymentserver_deploy_fail] - This command is used when there is more than one services that could not be

automatically deployed on more than one deployment servers. The system administrator will receive a notification with all the deployed services, grouped for each provisioning server in this situation. The details that will be displayed for every provisioning server are the ones available until the `[/repeat]` command.

- `[prinstance_deployed_fail_perserver_no]` - It will be replaced with the total number of services that could not be automatically deployed on the provisioning server.

- `[deploymentserver_url]` - It will be replaced with the URL address of the deployment server the services could not be deployed to. The customer account owner may click this link to access the server.

- `[repeat src=prinstance_deployed_detail]` - This command is used when there is more than one master services that could not be automatically deployed on a provisioning server. The system administrator will receive a notification with all the undeployed services. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[product_name]` - It will be replaced with the descriptive name of the service instance that could not be automatically deployed.

- `[order_no]` - It will be replaced with the number of the order the service instance belongs to.

- `[prinstance_deployed_fail_error]` - It will be replaced with the error triggered by the automatic deployment process. This error must be fixed with maximum priority in order to allow the scheduled task to work in the future.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed_detail]).

- `[repeat src=prinstance_deployed_slave_detail]` - This command is used when there is more than one independent slave services that could not be automatically deployed on a provisioning server. The system administrator will receive a notification with all the undeployed services. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[product_name]` - It will be replaced with the descriptive name of the service instance that could not be automatically deployed.

- `[master_product_name]` - It will be replaced with the descriptive name of the master service to which the slave belongs to.

- `[order_no]` - It will be replaced with the number of the order the service instance belongs to.

- `[prinstance_deployed_fail_error]` - It will be replaced with the error triggered by the automatic deployment process. This error must be fixed with maximum priority in order to allow the scheduled task to work in the future.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed_slave_detail]).

- `[repeat     src=prinstance_deployed_addon_detail]` - This command is used when there is more than one independent add-on services that could not be automatically deployed on a provisioning server. The system administrator will receive a notification with all the undeployed services. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[product_name]` - It will be replaced with the descriptive name of the service instance that could not be automatically deployed.

- `[master_product_name]` - It will be replaced with the descriptive name of the master service to which the add-on belongs to.

- `[order_no]` - It will be replaced with the number of the order the service instance belongs to.

- `[prinstance_deployed_fail_error]` - It will be replaced with the error triggered by the automatic deployment process. This error must be fixed with maximum priority in order to allow the scheduled task to work in the future.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_deployed_addon_detail]).

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=deploymentserver_deploy_fail]).

- `[repeat  src=deploymentserver_fail]` - This command is used when there is more than one server that could not be used due to a certain error. The system administrator will receive a notification with all the servers that could not be used. The details that will be displayed for each server are the ones available until the `[/repeat]` command.

- `[deploymentserver_ip]` - It will be replaced with the IP address of the server that could not be used by the activate/suspend scheduled task.

- `[deploymentserver_url]` - It will be replaced with the URL address of the deployment server that could not be used. The customer account owner may click on this link to access the server.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=deploymentserver_fail]).

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'Deployment Report Notification' Email Template

You can edit the Order Deployment Report Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Order Deployment Report Notification' Email Template section.

Remove a 'Order Deployment Report Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Service(s) Suspension Notification' Templates

This notification is sent when a deployed service is suspended due to a particular reason. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'Service(s) Suspension Notification' Templates management page, click the Edit link available in the Text column.

The 'Service(s) Suspension Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 📗 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the [Edit a 'Service(s) Suspension Notification' Email Template](#) section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Service(s) Suspension Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:
   - Email Form
     - Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.
     - Language - Use the drop-down list to select the notification language.
     - Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       > ⚠ **Caution**
       >
       > Only one template can be added for each language!

     - Encoding - Use the drop-down list to select the email template type:

- Text

- HTML

◦ Email subject - Use the available text box to specify the email template title.

> **Note**
>
> When you try to create a new email template, this field is populated with the default subject: **Service(s) Suspension Notification**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- `[recipient_name]` - It will be replaced with the name of the person receiving the notification.

- `[repeat src=prinstance_suspended_detail]` - This command is used at repeating the master standalone deployment details if more than one service has been suspended. The details that will be displayed for each suspended instance are the ones available until the `[/repeat]` command.

- `[prinstance_suspended_date]` - It will be replaced with date when the service instance was suspended.

- `[prinstance_suspended_reason]` - It will be replaced with the reason that triggered the service instance suspension.

- `[product_sku]` - It will be replaced with the suspended service instance Stock Keeping Unit.

- `[product_name]` - It will be replaced with the suspended service instance descriptive name.

- `[prinstance_deployment_id]` - It will be replaced with the service instance deployment identification number.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the suspended service instance was deployed.

- `[prinstance_activate_action]` - It will be replaced with the action that the customer account owner must undertake in order to reactivate the suspended service instance.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_suspended_detail]).

- [repeat   src=prinstance_suspended_slave_detail]   -   This command is used at repeating the independent slave deployment details if more than one service has been suspended. The details that will be displayed for each suspended instance are the ones available until the [/repeat] command.

- [prinstance_suspended_date] - It will be replaced with date when the service instance was suspended.

- [prinstance_suspended_reason] - It will be replaced with the reason that triggered the service instance suspension.

- [product_sku] - It will be replaced with the suspended service instance Stock Keeping Unit.

- [product_name] - It will be replaced with the suspended service instance descriptive name.

- [prinstance_deployment_id] - It will be replaced with the service instance deployment identification number.

- [master_product_name] - It will be replaced with the master deployment service instance descriptive name to which the slave belongs to.

- [deploymentserver_url] - It will be replaced with the URL address of the server where the suspended service instance was deployed.

- [prinstance_activate_action] - It will be replaced with the action that the customer account owner must undertake in order to reactivate the suspended service instance.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_suspended_slave_detail]).

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'Service(s) Suspension Notification' Email Template

You can edit the Service(s) Suspension Notification template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Service(s) Suspension Notification' Email Template section.

Remove a 'Service(s) Suspension Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Service(s) Reactivation Notification' Templates

This notification is sent when a service that was previously suspended is reactivated. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'Service(s) Reactivation Notification' Templates management page, click the Edit link available in the Text column.

The 'Service(s) Reactivation Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 📝 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the Edit a 'Service(s) Reactivation Notification' Email Template section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

Add a New 'Service(s) Reactivation Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form

     ◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.

     ◦ Language - Use the drop-down list to select the notification language.

     ◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       ⚠ **Caution**

       Only one template can be added for each language!

     ◦ Encoding - Use the drop-down list to select the email template type:

       ▪ Text

       ▪ HTML

     ◦ Email subject - Use the available text box to specify the email template title.

       Note

       When you try to create a new email template, this field is populated with the default subject: **Service(s) Reactivation Notification**.

     ◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

       ▪ [recipient_name] - It will be replaced with the name of the person receiving the notification.

- `[repeat src=prinstance_activated]` - This command is used at repeating the master standalone deployment details if more than one service instance have been reactivated. The details that will be displayed for each reactivated instance are the ones available until the `[/repeat]` command.

- `[product_sku]` - It will be replaced with the reactivated service instance Stock Keeping Unit.

- `[product_name]` - It will be replaced with the reactivated service instance descriptive name.

- `[prinstance_deployment_id]` - It will be replaced with the reactivated service instance deployment identification number.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the reactivated service instance was deployed.

- `[prinstance_activated_date]` - It will be replaced with the date the deployed service instance was reactivated.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_activated]).

- `[repeat src=prinstance_activated_slave]` - This command is used at repeating the slave deployment details if more than one service instance have been reactivated. The details that will be displayed for each reactivated instance are the ones available until the `[/repeat]` command.

- `[product_sku]` - It will be replaced with the reactivated service instance Stock Keeping Unit.

- `[product_name]` - It will be replaced with the reactivated service instance descriptive name.

- `[prinstance_deployment_id]` - It will be replaced with the reactivated service instance deployment identification number.

- `[master_product_name]` - It will be replaced with the master deployment service instance descriptive name to which the slave belongs to.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the reactivated service instance was deployed.

- `[prinstance_activated_date]` - It will be replaced with the date the deployed service instance was reactivated.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_activated_slave]).

- [automation_apptitle] - It will be replaced with the personalized application name, as set up by the user.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'Service(s) Reactivation Notification' Email Template

You can edit the Service(s) Reactivation Notification template by clicking its name available in the Subject column of the Email Templates table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Service(s) Reactivation Notification' Email Template section.

Remove a 'Service(s) Reactivation Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Service(s) Termination Notification' Templates

This notification is sent when a service instance enqueued for termination is completely removed from the provisioning server and from the data base. It can be sent to the customer account owner (default), the administrator (default) or to another custom email address.

To access the 'Service(s) Termination Notification' Templates management page, click the Edit link available in the Text column.

The 'Service(s) Termination Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 📥 Add an email template icon available in the Tools area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the [Edit a 'Service(s) Termination Notification' Email Template](#) section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> 📝 **Note**
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Service(s) Termination Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:

   - Email Form
     - Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

       You can add/remove several attachments using the ⊞ ⊟ icons.
     - Language - Use the drop-down list to select the notification language.
     - Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

       > ⚠️ **Caution**
       >
       > Only one template can be added for each language!

     - Encoding - Use the drop-down list to select the email template type:

- Text

- HTML

◦ Email subject - Use the available text box to specify the email template title.

> **Note**
>
> When you try to create a new email template, this field is populated with the default subject: **Service(s) Termination Notification**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- [recipient_name] - It will be replaced with the name of the person receiving the notification.

- [repeat src=prinstance_terminated] - This command is used at repeating the master standalone deployment details if more than one services have been terminated. The details that will be displayed for each terminated instance are the ones available until the [/repeat] command.

- [product_sku] - It will be replaced with the terminated service instance Stock Keeping Unit.

- [product_name] - It will be replaced with the terminated service instance descriptive name.

- [prinstance_deployment_id] - It will be replaced with the terminated service instance deployment identification number.

- [deploymentserver_url] - It will be replaced with the URL address of the server where the terminated service instance was deployed.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_terminated]).

- [repeat src=prinstance_terminated_slave] - This command is used at repeating the slave deployment details if more than one services have been terminated. The details that will be displayed for each terminated instance are the ones available until the [/repeat] command.

- [product_sku] - It will be replaced with the terminated service instance Stock Keeping Unit.

- [product_name] - It will be replaced with the terminated service instance descriptive name.

- `[prinstance_deployment_id]` - It will be replaced with the terminated service instance deployment identification number.

- `[master_product_name]` - It will be replaced with the master deployed service instance descriptive name to which the slave belongs to.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the terminated service instance was deployed.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_terminated_slave]).

- `[automation_apptitle]` - It will be replaced with the personalized application name, as set up by the user.

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit a 'Service(s) Termination Notification' Email Template

You can edit the Service(s) Termination Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Service(s) Termination Notification' Email Template section.

Remove a 'Service(s) Termination Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The 'Activate/Suspend Report Notification' Templates

This notification is sent every time the report is run. The purpose of the task is to suspend the unpaid services and to re-activate those that have been previously suspended. The time frame when this task is ran can be set in the scheduled task's script. By default, the task is ran daily every 11 minutes. The notification can be sent to the administrator (default) or to another custom email address.

To access the 'Activate/Suspend Report Notification' Templates management page, click the Edit link available in the Text column.

The 'Activate/Suspend Report Notification' Templates Management Page

Multiple actions can be performed:

- View the email templates list.
- Search the email templates list using specific criteria.
- Add a new email template.
- Edit an existing email template.
- Remove email templates.

You can add a new template by clicking the 🗒 Add an email template icon available in the `Tools` area.

VoipNow Automation displays, in the `Email Templates` area, the following information about each template:

- Language - The language the notification is written in.
- Subject - The notification's subject that will be displayed in the email message, in the specific language.

  Click the link if you want to view/edit the email template. For more information, check the [Edit an 'Activate/Suspend Report Notification' Email Template](#) section.

- Encoding - An email template can be sent either in a `Text` or a `HTML` format.
- Last update - The date when the email template was last modified.
- Customer accounts - The number of customer accounts using the template. It depends on the language selected by the customer account owner in the online store.

> 📝 Note
>
> The default email template is highlighted using bold characters and cannot be deleted.

Add a New 'Activate/Suspend Report Notification' Email Template

If you want to add a new template, you must follow the next steps:

1. Fill in the details available in the Configure the New Email Template page:
   - Email Form

◦ Upload template attachment - Use the ⬚ button to locate on your computer the attachment you want to upload.

You can add/remove several attachments using the ⊞ ⊟ icons.

◦ Language - Use the drop-down list to select the notification language.

◦ Use as default template - Select this check box if you want to use this template as the default one. The email templates in English are set in the database, at the first install, as the default email templates.

> ⚠ Caution
>
> Only one template can be added for each language!

◦ Encoding - Use the drop-down list to select the email template type:

- Text

- HTML

◦ Email subject - Use the available text box to specify the email template title.

> 📒 Note
>
> When you try to create a new email template, this field is populated with the default subject: **[automation_apptitle] Maintenance Task Report**.

◦ Email body - The email template content. You can modify the text using the available controls. You can include tokens that will be automatically replaced by the system with the appropriate content:

- `[recipient_name]` - It will be replaced with the name of the person receiving the notification.

- `[autotask_rundate]` - It will be replaced with the date and time the report ran, as it was previously set in the scheduled task's script.

> 📒 Note
>
> Scheduled task example: `*/11 * * * * command to be executed`
>
> The command will be run every 11 minutes, every day of the week, all the month.

- `[prinstance_processed_no]` - It will be replaced with the total number of master standalone services the scheduled task has processed.

- `[prinstance_processed_slave_no]` - It will be replaced with the total number of slave services the scheduled task has processed.

- `[prinstance_activated_no]` - It will be replaced with the total number of master standalone services the scheduled task has re-activated.

- `[prinstance_activated_slave_no]` - It will be replaced with the total number of slave services the scheduled task has re-activated.

- `[prinstance_suspended_no]` - It will be replaced with the total number of master standalone services the scheduled task has successfully suspended.

- `[prinstance_suspended_slave_no]` - It will be replaced with the total number of slave services the scheduled task has successfully suspended.

- `[prinstance_activated_fail_no]` - It will be replaced with the total number of master standalone services that could not be automatically re-activated by the scheduled task due to a specific error.

- `[prinstance_activated_slave_fail_no]` - It will be replaced with the total number of slave services that could not be automatically re-activated by the scheduled task due to a specific error.

- `[prinstance_suspended_fail_no]` - It will be replaced with the total number of master standalone services that could not be automatically suspended by the scheduled task due to a specific error.

- `[prinstance_suspended_slave_fail_no]` - It will be replaced with the total number of slave services that could not be automatically suspended by the scheduled task due to a specific error.

- `[repeat src=prinstance_activated]` - This command is used when there is more than one master standalone service that has been automatically re-activated. The system administrator will receive a notification with all the re-activated services. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[product_sku]` - It will be replaced with the re-activated service instance Stock Keeping Unit.

- `[product_name]` - It will be replaced with the re-activated service instance descriptive name.

- `[prinstance_deployment_id]` - It will be replaced with the re-activated service instance deployment identification number.

- [deploymentserver_url] - It will be replaced with the URL address of the server where the instance was deployed and re-activated. The customer account owner may click on this link to access the service.

- [prinstance_activated_date] - It will be replaced with the date the service instance was automatically re-activated.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_activated]).

- [repeat src=prinstance_activated_slave] - This command is used when there is more than one slave services that has been automatically re-activated. The system administrator will receive a notification with all the re-activated services. The details that will be displayed for each instance are the ones available until the [/repeat] command.

- [product_sku] - It will be replaced with the re-activated service instance Stock Keeping Unit.

- [product_name] - It will be replaced with the re-activated service instance descriptive name.

- [prinstance_deployment_id] - It will be replaced with the re-activated service instance deployment identification number.

- [master_product_name] - It will be replaced with the master service instance descriptive name to which the slave belongs to.

- [deploymentserver_url] - It will be replaced with the URL address of the server where the instance was deployed and re-activated. The customer account owner may click on this link to access the service.

- [prinstance_activated_date] - It will be replaced with the date the service instance was automatically re-activated.

- [/repeat] - This command marks the ending of the blocks previously defined ([repeat src=prinstance_activated_slave]).

- [repeat src=prinstance_suspended] - This command is used when there are more than one master standalone service that have been automatically suspended. The system administrator will receive a notification with all the suspended services. The details that will be displayed for each instance are the ones available until the [/repeat] command.

- [prinstance_suspended_date] - It will be replaced with the date the service instance was automatically suspended.

- `[prinstance_suspended_reason]` - It will be replaced with the reason that triggered the service instance suspension (e.g.: unpaid invoices).

- `[product_sku]` - It will be replaced with the suspended service instance Stock Keeping Unit.

- `[product_name]` - It will be replaced with the suspended service instance descriptive name.

- `[prinstance_deployment_id]` - It will be replaced with the suspended service instance deployment identification number.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the automatically suspended service instance was deployed. The customer account owner may click this link to access the server.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_suspended]).

- `[repeat  src=prinstance_suspended_slave]` - This command is used when there are more than one independent slave service that have been automatically suspended. The system administrator will receive a notification with all the suspended services. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[prinstance_suspended_date]` - It will be replaced with the date the service instance was automatically suspended.

- `[prinstance_suspended_reason]` - It will be replaced with the reason that triggered the service instance suspension (e.g.: unpaid invoices).

- `[product_sku]` - It will be replaced with the suspended service instance Stock Keeping Unit.

- `[product_name]` - It will be replaced with the suspended service instance descriptive name.

- `[prinstance_deployment_id]` - It will be replaced with the suspended service instance deployment identification number.

- `[master_product_name]` - It will be replaced with the master service instance descriptive name to which the slave belongs to.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the automatically suspended service instance was deployed. The customer account owner may click this link to access the server.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_suspended_slave]).

- `[repeat src=prinstance_activated_fail]` - This command is used when there is more than one master standalone service instance that could not be automatically re-activated due to a certain error. The system administrator will receive a notification with all the services that could not be re-activated. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[prinstance_deployment_id]` - It will be replaced with the service instance deployment identification number.

- `[order_no]` - It will be replaced with the number of the order the service instance belongs to.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the service instance that could not be automatically re-activated was deployed. The customer account owner may click this link to access the server.

- `[prinstance_activated_fail_error]` - It will be replaced with the error triggered by the automatic re-activation process. This error must be fixed.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_activated_fail]).

- `[repeat src=prinstance_activated_slave_fail]` - This command is used when there is more than one slave service instance that could not be automatically re-activated due to a certain error. The system administrator will receive a notification with all the services that could not be re-activated. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[prinstance_deployment_id]` - It will be replaced with the service instance deployment identification number.

- `[order_no]` - It will be replaced with the number of the order the service instance belongs to.

- `[master_product_name]` - It will be replaced with the master service instance descriptive name to which the slave belongs to.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the service instance that could not be automatically re-activated was deployed. The customer account owner may click this link to access the server.

- `[prinstance_activated_fail_error]` - It will be replaced with the error triggered by the automatic re-activation process. This error must be fixed.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_activated_slave_fail]).

- `[repeat src=prinstance_suspended_fail]` - This command is used when there is more than one master standalone service instance that could not be automatically suspended due to a certain error. The system administrator will receive a notification with all the services that could not be suspended. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[prinstance_deployment_id]` - It will be replaced with the service instance deployment identification number.

- `[order_no]` - It will be replaced with the number of the order the service instance belongs to.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the service instance that could not be automatically suspended was deployed. The customer account owner may click this link to access the server.

- `[prinstance_suspended_fail_error]` - It will be replaced with the error triggered by the automatic suspension process. This error must be fixed.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_suspended_fail]).

- `[repeat src=prinstance_suspended_slave_fail]` - This command is used when there is more than one slave service instance that could not be automatically suspended due to a certain error. The system administrator will receive a notification with all the services that could not be suspended. The details that will be displayed for each instance are the ones available until the `[/repeat]` command.

- `[prinstance_deployment_id]` - It will be replaced with the service instance deployment identification number.

- `[order_no]` - It will be replaced with the number of the order the service instance belongs to.

- `[deploymentserver_url]` - It will be replaced with the URL address of the server where the service instance that could not be automatically suspended was deployed. The customer account owner may click this link to access the server.

- `[prinstance_suspended_fail_error]` - It will be replaced with the error triggered by the automatic suspension process. This error must be fixed.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=prinstance_suspended_slave_fail]).

- `[automation_apptitle]` - It will be replaced with the personalized application name, as set up by the user.

- `[repeat src=deploymentserver_fail]` - This command is used when there is more than one server that could not be reached due to a certain error. The system administrator will receive a notification with all the servers that could not be reached. The details that will be displayed for each server are the ones available until the `[/repeat]` command.

- `[deploymentserver_ip]` - It will be replaced with the IP address of the server that could not be reached during the activate/suspend process.

- `[deploymentserver_url]` - It will be replaced with the URL address of the provisioning server that could not be reached. The customer account owner may click this link to access the server.

- `[/repeat]` - This command marks the ending of the blocks previously defined ([repeat src=deploymentserver_fail]).

2. Click Ok to save the changes and create the new template. To discard all the modifications and return to the previous page, click Cancel. If you want to send the edited email template to a certain address in order to verify it, click Send preview. To reset all the fields to the default values, click Reset.

Edit an 'Activate/Suspend Report Notification' Email Template

You can edit the Activate/Suspend Report Notification template by clicking its name available in the Subject column of the `Email Templates` table. The page that will open is identical with the Configure the New Email Template page described in the Add a New 'Activate/Suspend Report Notification' Email Template section.

Remove an 'Activate/Suspend Report Notification' Email Template

To finalize the removal, you have to review the list, select the Confirm removal check box and click Ok. If you do not want to delete these records, click Cancel to return to the previous page.

The Cloud Building Bricks Management

> **Note**
>
> This section refers to the **VoipNow Professional account** platform plug-in's specific cloud building bricks.

The customizable templates that can be added for the various cloud building brick types are the main resource needed to configure an application. VoipNow Professional requires user accounts, specific charging plans, bonus packages or personalized cost algorithms for various area codes. All these can be added using the specific templates.

Accounts

The user accounts define the VoipNow Professional structure. Based on them, the provided services can be distributed to the end users.

This layer allows you to add templates for three types of cloud building bricks:

- Reseller account
- Client account
- Extension account

Personalized permissions and limits can be set up for all the accounts.

Reseller Account

Add a New Reseller Account Template

To add a template, click the New link that corresponds to the Reseller account brick available in the Building Bricks table.

The Configure the New Reseller Account Template page allows you to set up the reseller account. The customizable options are grouped into several sections:

- The Brick Item section contains only one field:
  - Name - Use the available text box to provide a descriptive name for the reseller account template.
  - Item type: Standalone, exposed in VoipNow Professional Automation - This is a standalone cloud building brick which can be used to define standalone store items for purchase.

- The Permissions section allows you to control the new reseller account's behaviour:
  - Client management – When this option is enabled, the reseller is able to add and remove clients from his account.

    > **Note**
    >
    > Even if this permission is disabled on his account, the reseller can still edit the client's contact details.

    > **Note**
    >
    > When you select the **Client management** check box, the **Permission and limit management** option will be automatically enabled as well.
    >
    > On the contrary, if you first select the **Permission and limit management** check box, the **Client management** option will not be automatically enabled.

  - Roles and phone numbers management - When this option is enabled, the reseller is able to change clients' permissions and limits.

    > **Note**
    >
    > When you select the **Client management** check box, the **Roles and phone numbers management** check box is automatically selected.
    >
    > On the contrary, if you first select the **Roles and phone numbers management** check box, the **Client management** check box will not be automatically selected.

  - Extension management – When this option is enabled, the reseller is able to add and remove extensions belonging to his account's clients.

    > **Note**
    >
    > Even if this permission is disabled on his account, the reseller can still edit the contact details of his extensions.
    >
    > When you select the **Extension management** check box, VoipNow Professional automatically selects the **Extension features management** and the **Permission and limit management** check boxes.

  - Extension features management – When this option is enabled, the reseller is able to manage extension's functions. Without the Extension management option enabled, the reseller cannot enable/disable the

voicemail, call recording and conference features on phone terminal type extensions or change the queue size on queue type extensions.

◦ Phone extension SIP management – When this option is enabled, the reseller is allowed to use the provisioning features on his phone terminal extensions. Additionally he can choose the Allowed codecs for the phone terminal extensions. For more information on this topic, see the VoipNow Professional User Guide.

The reseller is also able to view and set the Phone extension SIP management permission for his clients.

◦ IM management - When this option is enabled, the reseller is able to manage the instant messaging application for his clients.

◦ Charging plan management – When this option is enabled, the reseller is able to add, remove or edit charging plans that define his client accounts' charging algorithms.

◦ Sound management – When this option is enabled, the reseller is able to manage, add, remove or edit sound and music on hold files, folders and languages.

◦ Phone number management – When this option is enabled, the reseller is able to assign public phone numbers to clients and extensions from his own public phone numbers pool.

◦ See stacked phone numbers – When this option is enabled, the reseller is able to assign public phone numbers to clients and extensions from the system's stacked phone numbers pool.

◦ CallAPI management - Select this check box to allow the reseller's clients to use CallAPI and to manage third party applications that will be allowed to access the system resources on their behalf, as resource owners. The remote applications will be able to handle local and external calls using their extensions and they will be authenticated with the OAuth protocol.

> **Note**
>
> If you do not enable this option, the reseller's clients will still be able to manage the **SystemAPI Control**.

> **Note**
>
> If the reseller does not have this feature enabled, neither will his clients and extensions. His clients will not be able to allow their extensions **CallAPI management**.

> ⚠ **Caution**
>
> The reseller accounts cannot access the CallAPI features regardless if this option is enabled or not!

◦ **CallerID management** - Select this check box to allow the reseller to edit the CallerID of his extension accounts. Also, when enabled, the reseller will be able to assign this permission to his child accounts as well.

◦ **MyVoipNow management** - Use the available drop-down list to choose what type of actions the reseller will be able to perform on his child accounts' MyVoipNow permissions:

  ▪ `None` - This is the default value that does not allow the reseller to modify his child accounts' MyVoipNow permissions granted by the system administrator.

  The administrator may decide to allow the reseller's child accounts `Standard` or `Premium` access to MyVoipNow even if the reseller has `None`.

  > ⚠ **Caution**
  >
  > If this value is selected, then the reseller will not be able to grant any **MyVoipNow** permissions to his child accounts. This section will not be visible for any of his child accounts from the reseller's context, no matter how the system administrator configured those accounts.

  ▪ `Standard` - If you choose this option, than the reseller will be able to grant his child accounts `Standard` access to MyVoipNow , but he will not have the right to grant them `Premium` access.

  The reseller's child accounts may have `Premium` access to MyVoipNow even if the reseller has `Standard`.

  > 🗒 **Note**
  >
  > The **MyVoipNow** `Standard` level can be offered for free to the customers and usually includes advertising.

  ▪ `Premium` - If you select this option, than the reseller will be able to set any type of MyVoipNow access to his child accounts.

> **Note**
>
> The of **MyVoipNow** `Premium` level includes extra features, no advertising and should be offered for a fee.

- Allow to provision devices - Use the available drop-down list to choose the provisioning permission level that will be granted to the reseller account. Depending on your selection, the reseller will be able manage his and his child accounts' provisioning templates and SIP devices:

  - `Modify` - If you select this permission, then the reseller will be able to manage his and all his client accounts' provisioning templates and SIP devices (including adding new equipment), regardless the type of permission the accounts have. In other words, the reseller will be allowed to handle the provisioning preferences of his child accounts even if their Allow to provision devices option is set to `View` or even to `None`.

    > **Note**
    >
    > If you choose this permission, then the reseller will be able to assign up to `Modify` rights to his child accounts.

  - `View` - If you select this permission, then the reseller will be able to manage his and all his client accounts' provisioning templates. Also, he will be able to add new SIP devices to the database for his account and for the clients that have their Allow to provision devices option is set to `Modify`. In consequence, the reseller will not be allowed to assign the equipment to his child accounts that have their permission set to `View` or to `None`.

    > **Note**
    >
    > If a client account has the permission set to `View` or if both the client and all his extensions have `None`, then the reseller will be able to see all the devices provisioned for that account, but the 🖳 **Add new device** function will be disabled.

    > **Note**
    >
    > If you choose this permission, then the reseller will be able to assign up to `View` rights to his child accounts.

▪ `None` - When this option is selected, the reseller is able to add new SIP devices only if one of his clients/extensions has the Allow to provision devices option set to `Modify` and only if the device will be assigned to that account. Also, the reseller will not be able to add new provisioning templates for his account, but only for his clients.

> **Note**
>
> If a client account has the permission set to `View` or if both the client and all his extensions have `None`, then the reseller will be able to see all the devices provisioned for that account, but the 🖥 **Add new device** function will be disabled.

> **Note**
>
> If you choose this permission, then the reseller will not be able to assign any type of provisioning rights to his child account. More, the **Allow to provision devices** option will not be available when adding new clients or extensions.

> **Note**
>
> **Special case (particularization for reseller and client accounts)**
>
> In practice, one can encounter a situation like the following:
>
> ▪ The **Reseller** has the `View` permission.
>
> ▪ The **Client** has the `Modify` permission.
>
> When the reseller logs in, he can change his client's **Allow to provision devices** permission from `Modify` to, for example, `View`. After saving the modification, he will not be able to revert it to `Modify` as this permission will be removed from the list:
>
>

> **Note**
>
> Only the `Phone terminal` extensions can be provisioned!

◦ Advertising management - Select this check box if you want to grant the reseller the possibility to manage all the advertising related options for his child accounts, including the advertising templates.

> ⚠️ **Caution**
>
> If this feature is not enabled, then the reseller will not be able to manage it on extension level, no matter the system administrator's choice. In other words, if the system administrator has enabled **Advertising** for an extension belonging to a reseller account that does not have the **Advertising management** permission enabled, then the reseller will not be able to manage it from its account.

- The Limits section allows you set up limitations for the new reseller account.

> 📝 **Note**
>
> The only limitations on the maximum value that can be set for certain options depend on the server's VoipNow Professional license.

> 📝 **Note**
>
> You can select the `Unlimited` check box if you do not want to restrict the reseller.

- **Maximum number of clients** – Use the available text box to impose a maximal limit to the number of clients the reseller account will be able to have.

- **Maximum number of phone extensions** – Use the available text box to impose a maximal limit to the number of Phone terminal type extensions the reseller account will be able to have.

- **Maximum number of queue extensions** – Use the available text box to impose a maximal limit to the number of Queue type extensions the reseller account will be able to have.

- **Maximum number of IVR extensions** – Use the available text box to impose a maximal limit to the number of IVR type extensions the reseller account will be able to have.

- **Maximum number of voicemail center extensions** – Use the available text box to limit the maximum number of Voicemail center extensions that can be created by the reseller account.

- **Maximum number of queue login center extensions** - Use the available text box to limit the maximum number of Queue login center extensions that can be created by the reseller account.

◦ **Maximum number of conference extensions** – Use the available text box to impose a maximal limit to the number of Conference type extensions the reseller account will be able to have.

◦ **Maximum number of callback extensions** – Use the available text box to limit the maximum number of Callback extensions that can be created by the reseller account.

◦ **Maximum number of callback callerIDs** - Use the available text box to limit the maximum number of callback CallerIDs.

◦ **Maximum number of calling card extensions** – Use the available text box to limit the maximum number of Calling card extensions that can be created by the reseller account.

◦ **Maximum number of calling card codes** - Use the available text box to limit the maximum number of calling card codes that can be created by the reseller account.

◦ **Maximum number of intercom/paging extensions** – Use the available text box to limit the maximum number of Intercom/paging extensions that can be created by the reseller account.

◦ **Maximum public concurrent calls** – Use the available text box to limit the number of active simultaneous calls between the reseller account's extensions and any other public network destination

> **Note**
>
> Both incoming and outgoing calls are counted!

> **Note**
>
> By default, when adding a new account, the **Maximum public concurrent calls** value is set to **1** as it is mandatory to allow at least one active call.

> **Note**
>
> Starting VoipNow Professional 2.5.1, the **Maximum public concurrent calls** depends on the license type, as the sum of values given to this parameter for all the `Phone terminal` extensions in the system determine the total number of SIP trunking channels, which is limited according to the VoipNow Professional license.
>
> Have in mind that if you set this parameter to `Unlimited`, then SIP trunking cannot be enabled on extension level. Therefore, if you want this feature to be used, it is advisable to set the **Maximum public concurrent calls** to

a value smaller or equal to the limit imposed by the VoipNow Professional license of the server where the account will be deployed.

> **Note**
>
> The maximum value that can be set by each one of the reseller's clients to their **Maximum public concurrent calls** parameter is the one set for the reseller.
>
> For example, if the value set for the reseller is `100` and `5` clients are added to his account, then each of them is able to set his **Maximum public concurrent calls** to `100`.
>
> In case the total active concurrent calls of all the reseller's clients reaches the limit imposed to his account, VoipNow Professional will play a busy tone to all the other calls over this limit. In other words, for the above example, only `100` concurrent calls are allowed on the channel for that reseller, and the rest, up to `500`, the maximum value for all the `5` clients, is rejected.

◦ Maximum internal concurrent calls — Use the available text box to limit the number of active simultaneous calls between the reseller account's extensions and any other internal network destination.

> **Note**
>
> Both incoming and outgoing calls are counted!

> **Note**
>
> By default, when adding a new account, the **Maximum internal concurrent calls** value is set to **1** as it is mandatory to allow at least one active call.

◦ Maximum number of queue members — Use the available text box to limit the number of agent extensions that can be added to a queue belonging to this reseller's account.

◦ Maximum number of mailboxes — Use the available text box to specify the maximum number of extensions allowed to have the voicemail option enabled.

> **Note**
>
> This limit is imposed to both reseller and administrator. When the limit is reached, all voicemail specific fields are disabled.

◦ **Maximum disk space for voicemail** – Use the available text box to specify the maximum storage space reserved for voicemail messages.

◦ **Maximum disk space for call recording** – Use the available text box to limit the maximum storage space reserved for call recordings.

◦ **Maximum disk space for sound files** – Use the available text box to limit the maximum storage space reserved for sound files.

◦ **Maximum disk space for music on hold files** – Use the available text box to limit the maximum storage space reserved for the music on hold files.

◦ **Maximum disk space for received faxes** – Use the available text box to limit the maximum storage space reserved for the received fax files.

◦ **Account expiration date** – If you want to set an expiration date for the reseller account, than deselect the `Unlimited` check box and use the available text box or the ▦ calendar button to specify the desired date.

> **Note**
>
> When the reseller account expires, all its child accounts expire as well.

Note

If, after finishing setting up a template, you want to add another one, select the **Add another reseller template** check box.

Caution

The limitations imposed to the new account depend on the provisioning server's configuration. For example, if the provisioning server offers only 100 MB for sound files and your have set your account's **Maximum disk space for sound files** limit to 200 MB, the account will be deployed complying the server's 100 MB value.

Edit a Reseller Account Template

Caution

When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. Deployed services are not affected by these changes!

To modify the permissions and limits of an existing template, follow the next steps:

1. In the Platform Bricks Management page click the View all link that corresponds to the Reseller account brick.
2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click its name link.
3. The Edit the Reseller Account Template page allows you to modify the desired parameters.

> **Note**
>
> For more details on how to modify the template, see the Add a New Reseller Account Template section.

Client Account

Add a New Client Account Template

To add a template, click the New link that corresponds to the Client account brick available in the Building Bricks table.

The Configure the New Client Account Template page allows you to set up the client account. The customizable options are grouped into several sections:

- The Brick item section contains only one field:
  - Name - Use the available text box to set a descriptive name for the client account template.
  - Item type: Standalone, exposed in VoipNow Professional Automation - This is a standalone cloud building brick which can be used to define standalone store items for purchase.
- The Permissions section allows you to control the new client account's behaviour:
  - Extension management – When this option is enabled, the client is able to add and remove extensions from his account.

    > **Note**
    >
    > Even if this permission is disabled on his account, the client can still edit the extension's contact details.

    > **Note**
    >
    > When you select the **Extension management** check box, the **Permission and limit management** option will be automatically selected as well.

> On the contrary, if you first select the **Permission and limit management** check box, the **Extension management** option will not be automatically enabled.

- Extension features management – When this option is enabled, the client is able to manage the extension's functions. Without the Extension management option enabled, the client is not able to enable/disable voicemail, call recording and conference features on phone terminal type extensions or change the queue size on queue type extensions.

> **Note**
>
> When the **Extension management** check box is selected, the **Extension features management** and the **Permission and limit management** check boxes cannot be deselected.

- Roles and phone numbers management - When this option is enabled, the client is able to change extensions' permissions and limits.

- Phone extension SIP management – When this option is enabled, the client is allowed to use the provisioning features on his phone terminal extensions. Additionally he can choose the Allowed codecs for the phone terminal extensions.

  The client is also able to view and set the Phone extension SIP management permission for his extensions.

- IM management - When this option is enabled, the client is able to manage the instant messaging application for his extensions.

- Charging plan management – When this option is enabled, the client is able to add, remove or edit charging plans that define his extension accounts' charging algorithms.

- Sound management – When this option is enabled, the client is able to manage, add, remove or edit sound and music on hold files, folders and languages.

- Phone number management – When this option is enabled, the client is able to assign public phone numbers to extensions from his own public phone numbers pool.

- CallAPI management - Select this check box to allow the client and his extensions to use CallAPI and to manage third party applications that will be allowed to access the system resources on their behalf, as resource owners. The remote applications will be able to handle local and external calls using these extensions and they will be authenticated with the OAuth protocol.

> ⚠️ **Caution**
>
> This line is displayed only if the reseller the client will belong to has **CallAPI management** enabled.

> 📝 **Note**
>
> If you do not enable this option, the client and his extensions will still be able to manage the **SystemAPI Control**.

> 📝 **Note**
>
> When this option is disabled, the **CallAPI Events** feature is disabled as well for all the client's extensions.

◦ CallerID management - Select this check box to allow the client to edit the CallerID of his extension accounts. Also, when enabled, the reseller will be able to assign this permission to his child accounts as well.

◦ MyVoipNow management - Use the available drop-down list to choose what type of actions the client will be able to perform on his extensions' MyVoipNow permissions:

▪ None - This is the default value that does not allow the client to modify his extensions' MyVoipNow permissions granted by the system administrator.

The administrator may decide to allow the client's extensions Standard or Premium access to MyVoipNow even if the client has None.

> ⚠️ **Caution**
>
> If this value is selected, then the client will not be able to grant any **MyVoipNow** permissions to his child accounts. This section will not be visible for any of his child accounts from the client's context, no matter how the system administrator configured those accounts.

▪ Standard - If you choose this option, than the client will be able to grant his extensions Standard access to MyVoipNow, but he will not have the right to grant them Premium access.

The client's extensions may have Premium access to MyVoipNow even if the client has Standard.

▪ Premium - If you select this option, than the client will be able to set any type of MyVoipNow access to his extensions.

◦ Allow to provision devices - Use the available drop-down list to choose the provisioning permission level that will be granted to the client account. Depending on your selection, the client will be able manage all the provisioning templates and SIP devices related features:

▪ `Modify` - If you select this permission, then the client will be able to manage the provisioning templates and SIP devices (including adding new equipment), regardless the type of permission the extension accounts have. In other words, the client will be allowed to assign devices to his extensions even if their Allow to provision devices option is set to `View` or even to `None`.

> 📝 **Note**
>
> If you choose this permission, then the client will be able to assign up to `Modify` rights to his extension accounts.

▪ `View` - If you select this permission, then the client will be able to manage his provisioning templates and add new SIP devices to the database, but only if these will be assigned to extensions that have their Allow to provision devices option set to `Modify`.

> 📝 **Note**
>
> If an extension account has the permission set to `View` or to `None`, then the client will be able to see all the devices provisioned for that account, but the 🖱 **Add new device** function will be disabled.

> 📝 **Note**
>
> If you choose this permission, then the client will be able to assign up to `View` rights to his extension accounts.

▪ `None` - When this option is selected, the client is able to add new SIP devices only if one of his extensions has the Allow to provision devices option set to `Modify` and only if the device will be assigned to that account. Also, the client will not be able to add new provisioning templates for his account.

> 📝 **Note**
>
> If you choose this permission, then the client will not be able to assign any type of provisioning rights to his child account. More, the **Allow**

to provision devices option will not be available when adding new extensions.

Note

Special case (particularization for reseller and client accounts)

In practice, one can encounter a situation like the following:

- The **Reseller** has the `View` permission.

- The **Client** has the `Modify` permission.

When the reseller logs in, he can change his client's **Allow to provision devices** permission from `Modify` to, for example, `View`. After saving the modification, he will not be able to revert it to `Modify` as this permission will be removed from the list:

Note

Only the `Phone terminal` extensions can be provisioned!

○ Company industry - Use the available text box to specify the industry this client belongs to. In MyVoipNow, the displayed advertising will match this selection, providing the client commercials from his business area using the template chose below.

If you are unsure about the client's business type or you do not want to set it up now, leave the field empty.

○ Advertising template - Use the available text box to specify the advertising template you want to be used at displaying the advertisements for the chosen industry.

Again, if you are unsure about the correct template, you can leave the field empty.

• The Limits section allows you set up limitations for the new client account.

Note

The only limitations on the maximum value that can be set for certain options depend on the server's VoipNow Professional license.

> **Note**
>
> You can select the `Unlimited` check box if you do not want to restrict the client.

- Maximum number of phone extensions – Use the available text box to impose a maximal limit to the number of Phone terminal type extensions the client account will be able to have.

- Maximum number of queue extensions – Use the available text box to impose a maximal limit to the number of Queue type extensions the client account will be able to have.

- Maximum number of IVR extensions – Use the available text box to impose a maximal limit to the number of IVR type extensions the client account will be able to have.

- Maximum number of conference extensions – Use the available text box to impose a maximal limit to the number off Conference type extensions the client account will have.

- Maximum number of calling card extensions – Use the available text box to impose a maximal limit to the number of Calling card type extensions the client account will have.

- Maximum number of calling card codes - Use the available text box to specify the maximum number of calling card codes.

- Maximum number of callback extensions – – Use the available text box to impose a maximal limit to the number off Callback type extensions the client account will have.

- Maximum number of callback callerIDs - Use the available text box to specify the maximum number of callback callerIDs.

- Maximum number of intercom/paging extensions – Use the available text box to impose a maximal limit to the number of Intercom/ Paging type extensions the client account will have.

- Maximum number of voicemail center extensions – Use the available text box to impose a maximal limit to the number of Voicemail center type extensions the client account will be able to have.

- Maximum number of queue login center extensions - Use the available text box to limit the maximum number of Queue login center extensions that can be created by the client account.

- Maximum public concurrent calls – Use the available text box to limit the number of active simultaneous calls between the client account's

extensions and any other public network destination. The value defined here cannot be bigger than the one set for the reseller and it restricts all the client's extension accounts as well.

> **Note**
>
> Both incoming and outgoing calls are counted!

> **Note**
>
> By default, when adding a new account, the **Maximum public concurrent calls** value is set to **1** as it is mandatory to allow at least one active call.

> **Note**
>
> Starting VoipNow Professional 2.5.1, the **Maximum public concurrent calls** depends on the license type, as the sum of values given to this parameter for all the `Phone terminal` extensions in the system determine the total number of SIP trunking channels, which is limited according to the VoipNow Professional license.
>
> Have in mind that if you set this parameter to `Unlimited`, then SIP trunking cannot be enabled on extension level. Therefore, if you want this feature to be used, it is advisable to set the **Maximum public concurrent calls** to a value smaller or equal to the limit imposed by the VoipNow Professional license of the server where the account will be deployed.

> **Note**
>
> The maximum value that can be set by each one of the client's extensions to their **Maximum public concurrent calls** parameter is the one set for the client.
>
> For example, if the value set for the client is `100` and `5` extensions are added to his account, then each of them is able to set his **Maximum public concurrent calls** to `100`.
>
> In case the total active concurrent calls of all the client's extensions reaches the limit imposed to his account, VoipNow Professional will play a busy tone to all the other calls over this limit. In other words, for the above example, only `100` concurrent calls are allowed on the channel for the client, and the rest, up to `500`, the maximum value for all the `5` extensions, is rejected.

◦ **Maximum internal concurrent calls** – Use the available text box to limit the number of active simultaneous calls between the client account's

extensions and any other internal network destination. The value defined here restricts all the client's extension accounts as well.

> **Note**
>
> Both incoming and outgoing calls are counted!

> **Note**
>
> By default, when adding a new account, the **Maximum internal concurrent calls** value is set to **1** as it is mandatory to allow at least one active call.

◦ Maximum number of queue members – Use the available text box to limit the number of agent extensions that can be added to a queue belonging to this client's account.

◦ Maximum number of mailboxes – Use the available text box to specify the maximum number of extensions allowed to have the voicemail option enabled.

> **Note**
>
> This limit is imposed to the client, reseller and administrator. When the limit is reached, all voicemail specific fields are disabled.

◦ Maximum disk space for voicemail – Use the available text box to limit the maximum storage space reserved for voicemail messages.

◦ Maximum disk space for call recording – Use the available text box to limit the maximum storage space reserved for call recordings.

◦ Maximum disk space for sound files – Use the available text box to specify the maximum storage space reserved for sound files.

◦ Maximum disk space for music on hold files – Use the available text box to specify the maximum storage space reserved for the music on hold files.

◦ Maximum disk space for received faxes – Use the available text box to specify the maximum storage space reserved for received fax messages.

◦ Account expires in {x} days – Use the available text box to specify the client account availability by deselecting the Unlimited check box.

> **Note**
>
> If the client account expires, all the extensions belonging to it expire as well.

Edit a Client Account Template

To modify the permissions and limits of an existing template, follow the next steps:

1. In the Platform Bricks Management page click the [View all] link that corresponds to the Client account brick.
2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click its name link.
3. The Edit the Client Account Template page allows you to modify the desired parameters.

Extension Account

Add a New Extension Account Template

To add a template, click the [New] link that corresponds to the Extension account brick available in the Building Bricks table.

The Configure the New Extension Account Template page allows you to set up the extension account. This page has fixed sections, available for all

the extension types, and dynamic sections, that are populated depending on the chosen extension type.

The fixed sections are:

- The Brick item section contains only one field:
  - Name - Use the available text box to set a descriptive name for the extension account template.
  - Item type: Standalone, exposed in VoipNow Professional Automation - This is a standalone cloud building brick which can be used to define standalone store items for purchase.
- The Permissions section allows you to control the new extension account's behaviour:
  - Extension is multi user aware — This option allows the extension to communicate with the other extensions available on the same client account and to use them when setting up features involving call redirection such as: Ring all, Call forward, Call cascade, etc.

    Selecting this check box will enable the Sharing Policies section, where you will be able to allow the extension to share its call records, voicemails, fax messages and call history with other extensions in the same group or company.

    > **Note**
    >
    > When you add a new extension, you will be able to manage only the call history sharing as the others options will be available only if they will be enabled during the extension's configuration process.

    > **Note**
    >
    > The **Extension is multi user aware** option may be deselected only for the Phone terminal extensions type. The other extension types MUST be multi-user aware by design because otherwise they cannot serve their purpose.

    > **Note**
    >
    > A Phone terminal extension that it is not multi-user aware cannot see the CallerIDs associated with DIDs from its client pool, but it can choose CallerIDs from the DIDs associated with its own extension pool.

  - Phone extension SIP management — When this option is enabled, the extension account owner is allowed to use the provisioning features on

his phone terminal extensions. Additionally, he can choose the Allowed codecs option for the phone terminal extension.

> **Note**
>
> The **Phone extension SIP management** option is available for the `Phone terminal` extensions type only.

◦ IM management - When this option is enabled, the extension account owner is able to manage the chat application.

◦ Sound management – When this option is enabled, the extension account owner is able to manage, add, remove or edit sound and music on hold files, folders and languages.

◦ CallAPI management - Select this check box to allow the extension to use CallAPI and to manage third party applications that will be allowed to access the system resources on its behalf, as resource owner. The remote applications will be able to handle local and external calls using this extension and they will be authenticated with the OAuth protocol.

> **Caution**
>
> This line is displayed only if the client the extension will belong to has **CallAPI management** enabled.

> **Note**
>
> If you do not enable this option, the extension will still be able to manage the **SystemAPI Control**.

> **Note**
>
> When this option is disabled, the **CallAPI Events** feature is disabled as well.

◦ CallerID management – When this option is enabled, the extension is able to change callerID settings.

> **Note**
>
> The **CallerID management** option is available for the `Phone terminal` extensions type only.

◦ Allow to provision devices - Use the available drop-down list to choose the provisioning permission level that will be granted to the extension

account. Depending on your selection, the extension will be able to add new SIP devices or not:

- `Modify` - If you select this permission, then the extension account owner will have access to the Provisioning fieldset from the Provisioning and SIP Preferences page that will allow him to enable the controls required to add and provision new SIP devices.

- `View` - If you select this permission, then the extension owner will be able to see the Provisioning fieldset, but he will not be allowed to change anything or to add new SIP devices.

- `None` - With this permission selected, the Provisioning fieldset is not even displayed. The extension owner will only be allowed to mange the other SIP and, if the Enable chat server access feature is enabled, IM related preferences.

> **Note**
>
> This option is available for `Phone terminal` extensions only!

> **Note**
>
> Have in mind that if you have assigned a provisioned device to the extension account, then the owner will not be able to modify it or to add a new one regardless the permission level selected here.

- The Limits section allows you set up limitations for the new extension account.

> **Note**
>
> The only limitations on the maximum value that can be set for certain options depend on the server's VoipNow Professional license.

> **Note**
>
> You can select the `Unlimited` check box if you do not want to restrict the extension.

- Maximum disk space for sound files – Use the available text box to specify the maximum storage space reserved for sound files.

- Maximum disk space for music on hold files – Use the available text box to specify the maximum storage space reserved for the music on hold files.

◦ Maximum public concurrent calls – Use the available text box to limit the number of active simultaneous calls between the extension and any other public network destination. The maximum value depends on the ones set for the extension's parent accounts and cannot exceed the license limitation.

> **Note**
>
> Both incoming and outgoing calls are counted!

> **Note**
>
> By default, when adding a new account, the **Maximum public concurrent calls** value is set to **1** as it is mandatory to allow at least one active call.

> **Note**
>
> Starting VoipNow Professional 2.5.1, the **Maximum public concurrent calls** depends on the license type, as the sum of values given to this parameter for all the `Phone terminal` extensions in the system determine the total number of SIP trunking channels, which is limited according to the VoipNow Professional license.
>
> Have in mind that if you set this parameter to `Unlimited`, then SIP trunking cannot be enabled for the extension. Therefore, if you want this feature to be used, then it is advisable to set the **Maximum public concurrent calls** to a value smaller or equal to the limit imposed by the VoipNow Professional license of the server where the account will be deployed and by the parent accounts.

> **Note**
>
> The maximum value that can be set for each extension to the **Maximum public concurrent calls** parameter is the one set for the client it belongs to.
>
> For example, if the value set for the client is `100` and `5` extensions are added to his account, then, for each of them, the **Maximum public concurrent calls** value can be set to `100`.
>
> In case the total active concurrent calls of all the client's extensions reaches the limit imposed to client account, VoipNow Professional will play a busy tone to all the other calls over this limit. In other words, for the above example, only `100` concurrent calls are allowed on the channel for that client,

and the rest, up to `500`, the maximum value for all the `5` extensions, is rejected.

◦ Maximum internal concurrent calls — Use the available text box to limit the number of active simultaneous calls between the extension and any other internal network destination.

> 🗒 Note
>
> Both incoming and outgoing calls are counted!

> 🗒 Note
>
> By default, when adding a new account, the **Maximum internal concurrent calls** value is set to **1** as it is mandatory to allow at least one active call.

◦ Maximum number of queue members — Use the available text box to limit the number of agents that can be added to the queue.

> 🗒 Note
>
> The **Maximum number of queue members** option is available for `Queue` extensions only.

◦ Account expires in {x} days — Use the available text box to specify the extension account availability by deselecting the `Unlimited` check box.

• MyVoipNow - This section allows you to configure the MyVoipNow features that will be available to the `Phone terminal` extension account.

◦ Level - Use the available drop-down list to choose the access type the extension will be granted to MyVoipNow :

▪ `None` - This is the default value that does not allow the extension to access MyVoipNow . When selected, all the other fields are grayed out.

▪ `Standard` - Selecting this option will offer the extension free access to the MyVoipNow service, usually offered with included advertising.

▪ `Premium` - Selecting this option will offer the extension paid access to the MyVoipNow service, offered with extra functions and without advertising.

◦ Advertising - Select this check box if you want to grant the extension the possibility to manage the advertising related options.

◦ Show browser chat - Select this check box to enable the browser chat feature. The chat allows fast and straightforward communications between extensions directly from the MyVoipNow interface.

◦ **Show active calls** - Choose whose active calls will be visible to the extension account user in the MyVoipNow interface:

▪ `Own` - Only the extension's calls will be displayed.

▪ `Group` - If the extension is part of a group, then the active calls of all the group's extensions will be available.

▪ `All` - The active calls of all the extensions belonging to the same client account will be displayed.

◦ **Perform operations on calls** - Depending on your choice, the extension account user will be able to perform various operations on the active calls:

▪ `Own` - Only on his own calls.

▪ `Group` - On all the extensions in the group(s) the account is part of.

▪ `All` - On all the extensions belonging to the same client account.

◦ **Record calls** - Choose whose calls the extension account user will be able to record:

▪ `Own` - His own.

▪ `Group` - Of all the extensions in the group(s) the account is part of.

▪ `All` - Of all the extensions belonging to the same client account.

◦ **Whisper/Barge-In on call** - Choose for whose calls these two features will be available:

▪ `Own` - Only for his own calls.

▪ `Group` - For the calls of all the extensions in the group(s) the account is part of.

▪ `All` - For all the calls of the extensions belonging to the same client account.

> **Note**
>
> **Call whisper** is a calling feature that involves the playing of a message to the called party when they have answered a call, during which time the calling party continues to hear ringing. The called party can then decide whether to accept the call (usually by pressing a particular key) or to reject it (either by pressing a key or simply by hanging up).

> **Note**
>
> **Barge-in** is a calling feature that adds an user to a call that is in progress. Pressing a soft key automatically adds the user (initiator) to the shared-line

> call (target), and the users currently on the call receive a tone (if configured). Barge supports built-in conference and shared conference bridges.

- ◦ Unpark calls - Choose which parked calls the extension account user will be able to unpark:

  - ▪ `Parked by me` - Only the calls parked by him.

  - ▪ `Parked by anyone` - The extension user will be able to unpark all the calls.

- ◦ Pickup calls - Depending on your selection, the extension user will be able to answer:

  - ▪ `Own` - Only the calls targeted to his extension.

  - ▪ `Group` - The calls targeted to all the extensions in the group(s) the account is part of.

  - ▪ `All` - The calls targeted to all the extensions belonging to the same client account.

> **Note**
>
> **Call pick-up** is a feature that allows one to answer someone else's telephone call. This option can be accessed by pressing a preprogrammed button (usually labeled `Pick-Up`) or by pressing a special sequence of buttons on the telephone key pad.

> **Note**
>
> Selecting the `Group` option will allow the extension user to perform the selected operation on all the extensions in the same group(s). It is not required to specify a particular group association because anytime an extension wants to perform an operation on another extension, the application checks if there is a group that both extensions share.

- • Sharing Policies - Using the controls in this section you can allow the extension to share its call history, voicemails, call records and fax messages, if the proper features have been enabled, with other extensions in the same group(s) or in the same company. The extension user will be able to read the shared information from his own interface, but he will not be able to delete anything.

  - ◦ Share voicemail with

> **Note**
>
> This sharing option is available only for the `phone terminal` extension type if the **Enable voicemail** option is enabled.

◦ Share incoming faxes with

> **Note**
>
> This sharing option is available only for the `phone terminal` extension type if the **Enable fax center** option is enabled.

◦ Share recordings with

> **Note**
>
> This sharing option is available only for the `phone terminal` and `queue` extension types if the **Call recording function enabled** (for `phone terminal` extensions) and the **Record all queue conversations** (for `queue` extensions) are enabled for the respective extension types.

◦ Share call history with

> **Note**
>
> This sharing option is the only one available for all the extension types.

> **Note**
>
> From the **Available groups** lists you may choose with whom the extension will share its call history, voicemails, fax messages or recorded calls:
>
> ◦ `EVERYBODY` - If you select this option, than the extension will share its data with all the extensions from all the groups it is part of.
>
> ◦ `NOBODY` - The extension will not share anything with anyone.
>
> ◦ `{group_name}` - The list displays all the groups the extension is pat of. You can choose the group(s) the extension will share data with by clicking on the corresponding name. You may select as many groups as you want.
>
> To unassign a group, simply click on its name in the **Assigned groups** list. Also, if you want to unassign all the groups, click `NOBODY`.

> **Note**
>
> Inside a group, it is not necessary for an extension to have any sharing option enabled in order to be able to see another extension's call history.
>
> For example, *Extension 1* shares its call history with `NOBODY` and it is member of *Group A*. *Extension 2* is part of the same *Group A* and shares its call history with all the group members (it has the **{group_name}** option selected. Than, *Extension 1* will be able to see the call history for *Extension 2*.

- Extension Type Selection - Use the available radio buttons to choose the type of the new extensions that will be created with this template.

  The sections below depend on the extension type you select:

- Phone terminal
- Queue
- Voicemail center
- Queue login center
- Conference
- IVR

For the Phone terminal extension type, the following sections are dynamically generated:

- Basic Settings
  - Default music on hold folder – This folder contains the sound files that will be played in order, when the caller is on hold or when the extension waits for an operation to be performed.

    > **Note**
    >
    > The path will display the folder name and also its origin:
    >
    > //// placed before the name of a folder signals the admin's default folder.
    >
    > /// placed before the name of a folder signals the reseller's default folder.
    >
    > // placed before the name of a folder signals the client's default folder.
    >
    > / placed before the name of a folder signals the extension's default folder.

  - CallerID name in public calls – This feature allows you to customize the CallerID name that will be displayed on the callee's screen when the

extension is calling public destinations. Use the drop-down list to choose one of the three available options:

- ▪ `Set by server` - The callee's phone terminal will display, if it supports the CallerID function, the extension owner's Contact name.

- ▪ `Set by equipment` - The callee's phone terminal will display, if it supports the CallerID function, the caller's name as it is set up from the phone terminal apparatus.

- ▪ `Set by user` - If you select this option, a text box will be displayed, allowing you to set the CallerID name to a custom alphanumeric value. The value defined here will be displayed by the callee's phone terminal, if it supports the CallerID function.

  By default, the text box contains the extension's Contact name .

◦ **CallerID number in public calls** – This feature allows you to customize the CallerID number that will be displayed on the callee's screen when the extension is calling public destinations. Use the drop-down list to choose one of the three available options:

- ▪ `Set by server` - The callee's phone terminal will display, if it supports the CallerID function, the extension's public phone number.

- ▪ `Set by equipment` - The callee's phone terminal will display, if it supports the CallerID function, the phone number of that particular phone terminal apparatus.

- ▪ `Set by user` - If you select this option, a text box will be displayed, allowing you to set the CallerID number to a custom numeric value with three or more digits. The value defined here will be displayed by the callee's phone terminal, if it supports the CallerID function.

  By default, the text box contains the extension's phone number.

Setup Extension Joe Doe (0039*001)

Use this page to edit the phone terminal settings for extension **0039*001**.

Basic Settings

Default music on hold folder	////	
CallerID name in public calls	Set by user	JD
CallerID number in public calls	Set by user	7264

Customizing the CallerID name and the CallerID number

> **Note**
>
> The system can send the **CallerID name** *set by server* and the **CallerID number** *set by user* or vice-versa.

> **Note**
>
> If you choose either the *Set by equipment* or the *Set by user* options, the **Currently using CallerID numbers** line will be disabled and you will not be able to select a CallerID to be associated with the extension's outgoing calls.

- Do not send CallerID on public calls [] (Anonymous) - Select this check box if you do not want your CallerID to be sent to public destinations. The callee's phone terminal will display, if it supports the CallerID function, the `Anonymous` string.

- Send public CallerID on internal calls [] (if public CallerID is available) – Select this check box if you want the public CallerID, when available, to be used for local and extended local calls as well.

> **Note**
>
> When this option is enabled, the association between the `Phone terminal` user's CallerID and an existing card code defined for the same CallerID is made.

- Preserve original CallerID on transferred calls - Select this check box if you want VoipNow Professional to keep the original CallerID when the call is forwarded between destinations.

- Send SIP P-Asserted-Identity header – When enabled, a new header is added to all outgoing INVITE requests sent from this extension. The header contains the extension's caller ID number, e.g. P-Asserted-Identity: `sip:0003*003@localhost.localdomain`.

- Hangup when extension does not answer in {x} seconds – Use this text box to define the time interval a call is allowed to ring before being terminated by the VoipNow Professional server. The default value is 30 seconds.

- Do not keep calls in parking lots for more than {x} seconds – Use this text box to define the time interval a call is allowed to remain in the parking lot before being transferred back to the extension that parked the call. The default value is 180 seconds.

- **Instant Messaging**

  - Enable server chat access – Select this check box to allow the extensions to access the Instant Messaging chat server.

- **Calling Features**

◦ **Call waiting active** – Calls are not rejected when the extension is busy. When this option is enabled, the user will be able to answer to multiple calls using the phone's call waiting features.

◦ **Do not disturb function active** – When this option is enabled, calls are rejected and a custom sound file is played to the callers trying to contact the extension.

◦ **[] Play sound {file_name} when DND is activated** – This sound is played to the callers trying to contact the extension while `Do not disturb` function is enabled. Use the available text box to specify the sound file name and path.

> **Note**
>
> The path will display the folder name and also its origin:
>
> `////` placed before the name of a folder signals the admin's default folder
>
> `///` placed before the name of a folder signals the reseller's default folder
>
> `//` placed before the name of a folder signals the client's default folder
>
> `/` placed before the name of a folder signals the extension's default folder

• **Conference** – This feature allows more than two extension owners to take part to the same phone conversation.

> **Note**
>
> The **Conference** function is available only for the extensions that have the **Extension is multi-user aware** permission enabled.

◦ **Conference function enabled** – When this check box is selected, the extension is able to create and join conference calls.

◦ **Conference room size** – Use this text box to set the maximum number of users that can join the conversation. You can fill in any number between 2 and 99.

◦ **Timeout on empty conference room {seconds} seconds** – Use this text box to set the timeout until the conference ends when there are no participants left. You can fill in any number between 1 and 9,999. If the conference is scheduled to close when all moderators exit, this option is not going to be taken into consideration.

◦ **Enable music on hold** – When this option is selected, VoipNow Professional plays the files located in the `Default music on hold` folder if there is only one user present in the conference.

- Prompt for PIN on conference creation – When this option is enabled, VoipNow Professional asks the conference creator to set a password. All the users that join the conference have to dial this password in order to access the conference.

- Close the conference when all conference moderators exit – When this option is enabled, VoipNow Professional terminates all the calls when all the conference moderators exit the conference.

- Announce user count on joining conference – When this option is selected, VoipNow Professional announces any new participant about the number of users in the conference call.

- Announce users joining/leaving – When this option is selected, VoipNow Professional announces the users about any participant joining or leaving the conference call.

- Voicemail – This feature allows callers to leave voice messages when the extension is unavailable or busy.

  - Enable voicemail – When this check box is selected, the extension is able to use the voicemail function.

  - Mailbox storage space – The space limit allowed for the mailbox. Use this text box to specify the number of Mb that the mailbox should not exceed. If you do not want to set a size limit, select the `Unlimited` check box.

  - Auto delete messages older than {x} days - Use the this text box to specify the number of days after which all the messages will be auto deleted. Values for this parameter range from 1 to 999.

  - New message notification – Choose the action that will be performed by VoipNow Professional when the extension receives a new voicemail message:

    - Send alert email – When this option is selected, the extension owner receives an email notifying him about a new voicemail message.

    - Send message by email – When this option is selected, the extension owner receives the new voicemail message file by email.

  - Voicemail password – The password requested when the mailbox is accessed over the phone. It must contain between 1 and 5 digits.

> **Note**
>
> If you do not set a password for the voice mailbox, the extension owner will not be able to access his mailbox over the phone. However, he will still

> be able to manage the voice mailbox through the VoipNow Professional interface.

- ◦ Voicemail automatically answers after {x} seconds – If the extension user does not answer after {x} seconds, `Voicemail` answers.

- **Fax Center** – This feature allows the extension to receive faxes and to manage them by using the extension account.

  - ◦ Enable fax center – When this check box is selected, the extension is able to receive faxes. Upon the receipt of a fax, VoipNow Professional will save it into a file on the server. The extension user can later retrieve them.

  - ◦ Play sound {sound} before sending fax - Select this check box if you want to choose a sound that will be played before a fax message is sent. Use the available text box to specify the sound file name and path.

  - ◦ Maximum disk space for received faxes – The space limit allowed for the storage of the received fax files. Use this text box to specify the number of Mb that the fax files should not exceed. If you do not want to set a size limit, select the `Unlimited` option.

  - ◦ Auto delete received faxes older than {x} days - Use the this text box to specify the number of days after which all received faxes will be auto deleted. Values for this parameter range from 1 to 999.

  - ◦ New received fax notification – Choose the action that will be performed by VoipNow Professional when the extension receives a new fax message:

    - ▪ Send alert email – When this option is selected, the extension owner receives an email notifying him about a new fax message.

    - ▪ Send fax by email – When this option is selected, the extension owner receives the new fax message file by email.

  - ◦ Fax automatically answers after {x} seconds – If the extension user does not answer after {x} seconds, the server will try to answer in order to detect a fax.

- **Call Recording** – This feature allows the user to record phone conversations.

  - ◦ Call recording function enabled – When this option is enabled, the user is able to use the call recording functions.

  - ◦ Call recording storage space – Use this text box to specify the number of Mb that the recorded calls should not exceed. If you do not want to set a size limit, select the `Unlimited` option.

  - ◦ Record triggered – Use the available options to specify when/how call recording will be triggered:

- Never – Although the call recording feature is enabled, it is not used.

- Only conferences – When this option is enabled, VoipNow Professional will record only conference conversations.

- When *1 is pressed – When this option is enabled, the user will be able to start the recording of a conversation by dialing *1 on his phone pad.

- All calls are recorded – When this option is enabled, VoipNow Professional will record all the extension's conversations.

◦ Play sound {sound} when call recording starts – When this option is enable, VoipNow Professional plays the sound each time a recording operation starts. Use the available text box to specify the sound file name and path.

- Password Protection - This feature allows the extension user to block the access to the phone terminal for a certain period of time. The terminal can be blocked/activated from its key pad by dialing the password set in this section. A blocked phone terminal cannot be used for placing or receiving calls. If the Voicemail feature is enabled, than the incoming calls will be redirected to voicemail while the phone terminal is blocked.

  ◦ Protected phone access active - Select this check box if you want to enable the Password Protection feature for this extension.

  > **Note**
  >
  > After enabling this feature and defining the required password, the following message will be displayed next to the check box: **Currently access to phone is unrestricted** . Clicking the [Block](#) link will restrict the phone terminal usage.
  >
  > If the access is restricted, the **Currently access to phone is blocked** message is displayed. Click the [Unblock](#) link to allow the extension user to dial/receive calls normally.

  ◦ Old access password

  > **Note**
  >
  > This line is displayed only when editing the extension's settings, if a password was previously defined for the **Password Protection** feature.

  ◦ Password to access telephony - Use the available text box to specify the password the user will have to dial to block/activate the access to his phone terminal.

For the Queue extension type, the following sections are dynamically generated:

- Queue General Preferences

  ◦ Queue size – The maximum number of callers waiting to talk to an operator. If you do not want to limit the queue size, select the `Unlimited` option. Otherwise, disable the `Unlimited` option and fill in a value in the available text box.

  ◦ Call distribution algorithm – VoipNow Professional offers you several methods of assigning calls to queue operators:

    ▪ Ring all – All free operator extensions ring at the same time and the call is transferred to the first operator that answers.

    ▪ Least recently called – The call is transferred to the operator with the longest waiting time interval from the previous call.

    ▪ Fewest calls – The call is transferred to the operator who has answered the fewest calls. This method does not take into account the actual agent workloads; it ignores the time the agents spent on each call.

    For example, if Agent1 has had 3 calls each lasting for 10 minutes and Agent2 has had 5 calls each lasting 2 minutes, VoipNow Professional will assign a new call to Agent1.

    ▪ Random – The call is transferred to a randomly selected operator.

    ▪ Round robin with memory – This method searches for available agents sequentially and uses the order of the agent list. Each time it tries to assign a call, it remembers the agent that answered the call `answered`; the next time a waiting call arrives, the search begins with agent in position `answered+1`.

    For example, let's assume you have a queue served by 3 agents. The first time a call arrives, VoipNow Professional searches for the first available operator using the order Agent1, Agent 2, Agent 3. Let's

suppose Agent2 is available and answers the call. When the second call arrives, VoipNow Professional starts the search with Agent3 and uses the order Agent3, Agent1, Agent2.

- Ring members in the adding order - The call is transferred to the agents in the order they have been added to the queue.

  For example, let's assume you have a queue managed by 3 agents. The first added to the queue is Agent1, the second is Agent2 and the third is Agent3. The first time a call arrives, VoipNow Professional searches for the first available operation using the order Agent1, Agent2, Agent3. If Agent1 is available, the call is transferred to him. If not, it will be transferred to Agent2. If he is not available as well, the call will be transferred to Agent3.

- Random with member penalty - The call is transferred to a randomly selected agent from those with the smallest penalty level. If none is available, a new agent is selected from the next penalty level.

  For example, let's assume you have a queue managed by 4 agents. Agent1 and Agent3 have the smallest penalty level, while Agent2 and Agent4 have a bigger penalty level. The first time a call arrives, VoipNow Professional searches for the group with the smallest penalty level and randomly assigns the call to one of the Agent1 and Agent3. If none is available, the call is transferred to one of the Agent2 and Agent4.

◦ Wait for {x} seconds before retrying all agents again – After ringing all operators according to the queue's call distribution algorithm, the application waits for {x} seconds before restarting the process. Values for this parameter range from 3 to 900 seconds. The default value is 20 seconds.

◦ Service level agreement – This is the maximum time interval that callers should be waiting in the queue. Values for this parameter range from 3 to 9,999. This text box is empty by default.

> **Note**
>
> For example, if you set up SLA to **10 seconds** and 20 calls are answered in less than 10 seconds, than **SLA = 100%**. If only 10 calls were answered in less than 10 seconds and the other 10 in more, than **SLA = 50%** .

◦ Record all queue conversations – This option allows the recording of all the calls taken by the queue operators.

Enabling the call recording will allow you to manage the extension's recordings sharing by editing its Roles and phone numbers.

◦ Call recording storage space – When the call recording option is enabled, you have the possibility to limit the storage space for the recordings. If you don't want to limit the space, select the `Unlimited` check box.

- Local Agents Behavior

  ◦ Ring an agent for a maximum of {x} seconds – The {x} value is the maximum time interval that an operator extension will ring. The default value is 20.

  ◦ Maintain a minimum of {x} seconds between calls – The {x} value specifies the minimum operator break between calls. The default value is 120.

  ◦ Delay for {x} seconds before connecting agent to caller – After an operator answers a call, the application will wait for {x} seconds before connecting the caller to the operator. Values for this delay range from 0 to 60 seconds. The default value is 0 seconds.

  ◦ Pickup announcement for agent – The sound that VoipNow Professional plays for queue agents before connecting them to a waiting call.

  > **Note**
  >
  > This feature is useful for agents that are simultaneously logged to several queues at the same time. Distinctive sounds can be assigned for every queue.

  ◦ Report how long the user waited in the queue – When this option is enabled, VoipNow Professional reports the time the user spent in queue before being connected to an agent.

  ◦ Restart timer if agent does not answer – When this option is enabled, the timer Maintain a minimum of {x} seconds between calls is reset every time the agent does not answer.

- Caller Behavior

  ◦ Play welcome sound – This is the sound played to the caller before connecting him to the queue. Use the available text box to specify the sound file name and path.

  ◦ Announce [] position and/or [] hold time every {y} seconds – Choose the announcements you want to be made to the caller every {y} seconds:

    ▪ Select the first check box if you want the callers to be informed about their position in the queue.

> **Note**
>
> The caller will be announced of his position in the queue using the `There are` sound and `The elapsed queue hold time` sound set in the **Sound files setup** section.

- Select the second check box if you want the callers to be informed about the time they have been waiting in the current queue for their call to be answered by an agent. The sound played to the user when this option is enabled is the one entered in the 'The elapsed queue hold time' sound field.

> **Note**
>
> Both check boxes can be selected at the same time.

- **Sound Files Setup**

  - Music on hold – The sound played to the callers while they are waiting.

  - 'There are' sound – The sound played to announce the position in the queue.

  > **Note**
  >
  > This is disabled if the **Announce Position every {y} seconds** is also disabled.

  - 'The elapsed queue hold time' sound – This is the sound played to the caller waiting in the queue for his/her call to be answered by an agent. It represents the amount of time for which the caller has been waiting in the current queue (the amount of time is not cumulative for callers that have been transferred from one queue to another).

  - 'You are now first in line' sound – The sound played to the caller that is in the second position in the queue.

  - 'Thank you for your patience' sound – The sound played to the caller that is first in the queue.

  - 'Calls waiting' sound – The sound played to describe how many calls are waiting in the queue.

  - 'Hold time' sound – This sound is played to the agent answering a call from a user waiting in the queue. This sound represents the amount of time for which the user has been waiting in the current queue.

◦ 'All reps busy/wait for next' sound – The sound played to announce the caller that, for the moment, all the agents are busy and that he has to wait a certain period until his call will be answered.

◦ 'Seconds' sound – The sound file that corresponds to the word 'seconds'.

◦ 'Minutes' sound – The sound file that corresponds to the word 'minutes'.

> **Note**
>
> Use the available text boxes to specify the sound file name and path.
>
> The path will display the folder name and also its origin:
>
> //// placed before the name of a folder signals the admin's default folder
>
> /// placed before the name of a folder signals the reseller's default folder
>
> // placed before the name of a folder signals the client's default folder
>
> / placed before the name of a folder signals the extension's default folder

- Queue Behavior

    ◦ Play sound {sound} on disconnect due to queue full - Use the available text box to specify the file name and path for the sound that will be played to the caller on disconnection due to queue full.

    ◦ Allow calls to enter queue when {agents_status} - When an incoming call is received, VoipNow Professional will allow it to enter the queue depending on the agents' availability set here:

        ▪ There are agents on queue, even logged out - The calls will be allowed to enter the queue if there is at least on agent defined for it, no matter if it is logged in or not. Basically, the calls will be accepted regardless the agent(s) status. This is the most unrestrictive option available.

        ▪ At least one agent is logged in and unpaused - VoipNow Professional will allow the calls to enter the queue only if at least one of the agents assigned to this queue is logged in and active (not on pause). This is the default option.

        ▪ At least one agent is logged in, maybe paused - Unlike the previous option, this one allows VoipNow Professional to accept the calls when at least one of the agents assigned to this queue is logged in, regardless if it is on pause or not.

    ◦ Drop existing calls from queue when {situation} - VoipNow Professional Automation allows you to choose the when the calls already in the queue to be dropped:

- `Never` - The existing calls will not be dropped, no matter the agents' status. This will allow the caller to remain in the queue after all the agents log out or enter into pause. This is the default value.

- `All agents enter into pause or log out` - The existing calls will be dropped from the queue when all the assigned agents will log out or will enter into pause.

- `All agents log out` - The existing calls will be dropped from the queue only when all the assigned agents will log out and there will be nobody left to pick them up.

For the Voicemail center extension type, the following sections are dynamically generated:

- Voicemail Center General Preferences
  - Play sound `{folder} {sound}` before connecting to voicemail center – This is the sound that will be played to the caller before he is connected to the extension. Use the available text box to specify the sound file name and path.

Starting VoipNow Professional 2.5.0, both local and remote agents can login to a queue. A remote agent, in order to connect to a queue, has to call the `Queue login center` extension, dial his AgentID followed by the # key and the login PIN of the queue he wishes to connect to. If the authentication is successful, the remote agent will be logged in to the queue and will behave like a local agent.

> **Note**
> A remote user must be defined from interface as a remote agent in order to be able to login to a queue!

For the Queue login center extension type, the following sections are dynamically generated:

- Queue Login Center General Preferences
  - Play sound `{folder} {sound}` before connecting to the queue login center – This is the sound that will be played to the callers trying to connect to the queue login center. Use the available text box to specify the sound file name and path.

For the Conference extension type, the following sections are dynamically generated:

- Conference Settings

- Play sound {sound} before connecting to conference center – When the check box is selected, use the available text box to specify the sound that will be played for the caller before he is connected to the extension.

- Conference room size - Use this text box to set the maximum number of users that can join the conversation. You can fill in any number between 2 and 99. The default value is 5.

- Record conference conversations - Three options are available:

  - Always - When this option is enabled, VoipNow Professional will always record all the conversations in this conference.

  - User's choice - When this option is enabled, the user has to decide which conversations will be recorded by VoipNow Professional.

  - Never - When this option is enabled, VoipNow Professional will never record any conversations in this conference.

- Call recording storage space – Use the available text box to limit the storage space allowed for recorded calls. If you do not want to limit the disk space, make sure the `Unlimited` check box is selected.

- Enable music on hold - When this option is deselected, VoipNow Professional plays the files located in the `Default music on hold` folder if there is only one user present in the conference.

- Music on hold folder - Use the box to specify the folder containing the files to be played if the Enable music on hold option is selected.

- **Default Settings For Scheduled Conferences**

  - Close the conference when all conference moderators exit - When this option is enabled, VoipNow Professional terminates all calls when all the conference moderators log out.

  - Announce user count on joining conference - When this option is selected, VoipNow Professional announces any new participant about the number of users in the conference call.

  - Announce users joining/leaving - When this option is selected, VoipNow Professional announces the users about any participant joining or leaving the conference call.

For the IVR extension type, the following sections are dynamically generated:

- **Default music on hold folder** – Use the available text box to specify the default folder to be used for music on hold files.

- Timeout – Use this text box to limit the time interval that an IVR caller can remain inactive when the IVR waits for his input. The allowed values range from 2 to 60 seconds. The default value is 8 seconds.

- IVR session lifetime – Use this text box to limit the total time interval that an IVR caller can spend in the IVR menu. The allowed values range from 10 to 86400 seconds. The default value is 1,800 seconds.

- If lifetime expires - Choose the action that will occur when IVR lifetime expires. The available options are:
  ◦ Hangup - The call will be terminated.
  ◦ Play sound - The sound to be played for the caller when IVR lifetime expires. Use the available text box to specify the sound file name and path.

- Description – Use this text area to associate some notes about the purpose and content of the IVR.

Edit an Extension Account Template

> ⚠ **Caution**
>
> When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. Deployed services are not affected by these changes!

To modify the permissions and limits of an existing template, follow the next steps:

1. In the Platform Bricks Management page click the <u>View all</u> link that corresponds to the Extension account brick.
2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click its name link.
3. The Edit the Extension Account Template page allows you to modify the desired parameters.

> 📝 **Note**
>
> For more details on how to modify the template, see the <u>Add a New Extension Account Template</u> section.

Charging Plans

A charging plan is a collection of rules which defines how the calls will be charged.

Prepaid Charging Plan

A prepaid charging plan allows the user to control the spent amounts and not be tied into ongoing commitments. Using this plan you can configure the charging algorithms, the permissions for incoming and outgoing calls, the initial credit or the taxation intervals.

Add a New Prepaid Charging Plan Template

To add a template, click the <u>New</u> link that corresponds to the Prepaid charging plan brick available in the Building Bricks table.

The Configure the New Prepaid Charging Plan Template page allows you to set up the prepaid plan. The customizable options are grouped into several sections:

- The Brick item section contains only one field:

  ◦ Name - Use the available text box to set a descriptive name for the prepaid charging plan.

  ◦ Item type: Standalone, exposed in VoipNow Professional Automation - This is a standalone cloud building brick which can be used to define standalone store items for purchase.

- The Charging Plan Description section allows you to define the call permissions:

  ◦ Outgoing routing group – Use this text box to specify the name of an existing routing group. These groups are collections of rules that allow you to block certain outgoing calls.

  ◦ Allow incoming calls from any network – When this option is enabled, the charging plan user is able to receive calls from extensions registered into the system as well as from extensions outside the system.

  ◦ Allow calls to public network – When this option is enabled, the charging plan user is able to make calls to extensions outside the server.

  ◦ Allow local calls to extensions owned by the same client like caller – When this option is enabled, the charging plan user is able to call extensions on the same client account.

  ◦ Allow extended local calls to extensions owned by other clients in the infrastructure – When this option is enabled, the charging plan user is able to call other extensions in the system.

- The Charging Segments section is used to configure the time intervals the users will be charged for their calls:

  ◦ Charge outgoing indivisible for the first {x} seconds (applies to internal and public network calls) – If an outgoing call lasts less than {x} seconds, the user will be charged the price corresponding to a {x} seconds call.

  ◦ After the first segment charge every {y} seconds – The cost of an outgoing call computes every {y} seconds, if a call lasts more than the indivisible interval {x} set above.

  ◦ Charge incoming calls indivisible for the first {w} seconds (applies only to calls from public network) – If an external incoming call lasts less than {w} seconds, the user will be charged the price corresponding to a {w} seconds call.

  ◦ After the first segment charge every {z} seconds – The cost of an external incoming call computes every {z} seconds, if a call lasts more than the indivisible interval {w} set above.

- The Fees section allows you to set up the amounts you want the users to be charged, as well as the initial credit available for their calls:

  ◦ Initial credit available for outgoing calls {currency} (to any destination local or in public network) – The credit offered to the user on account creation. This money can be used only for outgoing calls. If you do not want to limit the user, select the Unlimited check box.

  ◦ Initial credit available for incoming calls {currency} (for calls coming from local or public network) – The credit offered to the user on account creation. This money can be used only for incoming calls. If you do not want to limit the user, select the Unlimited check box.

  ◦ Charge method – Two methods for charging calls are provided: Fixed prices and Relative to call cost. They are mutually exclusive and must be used based on the system application. The following charging options are available for the two methods:

    ▪ Charging fixed price – This method charges all the calls made in the same time interval the same price. It does not take into consideration the real cost of the calls (e.g. the price charged by the channel provider or the call destination). The following fields are displayed:

      • Charge incoming calls {value} {currency}/second (coming from public network) – The charge for the calls received from outside the system.

        > **Note**
        >
        > This field is not available if the **Allow incoming calls from any network** option has not been selected in the **Charging Plan Description** section.

      • Charge outgoing calls {value_1} {currency}/second in time interval - {time_interval} (destination is in public network) - The charge for the calls made outside the system. Use the {time_interval} drop-down list to select the time interval(s) to which this charge will apply. Always, even when there are no time intervals defined, you can select the Anytime option to set this cost for all the external outgoing calls, without any time constraint.

        You can use the ⊟ ⊞ buttons to remove/add various charges for different time intervals. If there are no time intervals defined, these buttons will be grayed out.

      • Charge local calls to extensions {value} {currency}/second (destination is owned by the same client like caller) – The

charge for the calls made to extensions belonging to the same client account. The default cost is free of charge.

> **Note**
>
> This field is not available if the **Allow local calls to extensions owned by the same client like caller** option has not been selected in the **Charging Plan Description** section.

- Charge extended local calls to extensions {value} {currency}/second (destination is owned by other clients in the infrastructure) - The charge for the calls made to extensions that do not belong to the same client.

> **Note**
>
> This field is not available if the **Allow local calls to extensions owned by the same client like caller** and the **Allow outgoing extended local calls** options have not been selected in the **Charging Plan Description** section.

- Destination exception - Use the drop-down list to select one of the available charging destination exception templates. This field is dynamically populated, depending on the selected charging method.

- Charging relative to call costs – This method calculates the call costs using the real amount charged by the channel provider, based on call destination. It uses the following cost function:

`n*call cost + adjustment`, where:

- `n` and `adjustment` are parameters that can be set.

For the Charging relative to call costs method, the following fields are displayed:

- Charge incoming calls {value_1} x call cost + {value_2} {currency}/ second (coming from public network)

> **Note**
>
> This field is not available if the **Allow incoming calls from any network** option has not been selected in the **Charging Plan Description** section.

- Charge outgoing calls {value_1} x call cost + {value_2} {currency}/ second (destination is in public network)

> **Note**
>
> This field is not available if the **Allow calls to public network** option has not been selected in the **Charging Plan Description** section.

- Charge local calls to extensions {value_1} x call cost + {value_2} {currency}/ second (destination is owned by the same client like caller)

> **Note**
>
> This field is not available if the **Allow local calls to extensions owned by the same client like caller** option has not been selected in the **Charging Plan Description** section.

- Charge extended local calls to extensions {value_1} x call cost + {value_2} {currency}/ second (destination is owned by other clients in the infrastructure)

> **Note**
>
> This field is not available if the **Allow local calls to extensions owned by the same client like caller** and the **Allow outgoing extended local calls** options have not been selected in the **Charging Plan Description** section.

- Destination exception - Use the drop-down list to select one of the available charging destination exception templates. This field is dynamically populated, depending on the selected charging method.

- The Sound Files section:
  ◦ Play custom sound file when outgoing access is blocked – Select the folder and the sound file to be played when the user tries to make a call and the external access is blocked due to charging constraints.

> **Note**
>
> If, after finishing setting up a template, you want to add another one, select the **Add another prepaid charging plan** check box.

Edit a Prepaid Charging Plan Template

⚠ **Caution**

When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. Deployed services are not affected by these changes!

To modify an existing template, follow the next steps:

1. In the Platform Bricks Management page click the View all link that corresponds to the Prepaid charging plan brick.
2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click its name link.
3. The Edit the Prepaid Charging Plan Template page allows you to modify the desired parameters.

📓 **Note**

For more details on how to modify the template, see the Add a New Prepaid Charging Plan Template section.

Postpaid Charging Plan

The customer that uses a postpaid charging plan is charged for the usage in the prior month and does not feature any limitations on the volume of the service used. Using this plan you can configure the charging algorithms, the permissions and limitations for incoming and outgoing calls or the taxation intervals.

Add a New Postpaid Charging Plan Template

To add a template, click the New link that corresponds to the Postpaid charging plan brick available in the Building Bricks table.

The Configure the New Postpaid Charging Plan Template page allows you to set up the postpaid plan. The customizable options are grouped into several sections:

- The Brick item section contains only one field:
  - Name - Use the available text box to set a descriptive name for the postpaid charging plan.
  - Item type: Standalone, exposed in VoipNow Professional Automation - This is a standalone cloud building brick which can be used to define standalone store items for purchase.

- The Charging Plan Description section allows you to define the call permissions:

  ◦ Outgoing routing group – Use this text box to specify the name of an existing routing group. These groups are collections of rules that allow you to block certain outgoing calls.

  ◦ Allow incoming calls from any network – When this option is enabled, the charging plan user is able to receive calls from extensions registered into the system as well as from extensions outside the system.

  ◦ Allow calls to public network – When this option is enabled, the charging plan user is able to make calls to extensions outside the server.

  ◦ Allow local calls to extensions owned by the same client like caller – When this option is enabled, the charging plan user is able to call extensions on the same client account.

  ◦ Allow extended local calls to extensions owned by other clients in the infrastructure – When this option is enabled, the charging plan user is able to call other extensions in the system.

- The Charging Policy section allows you to set up the charging algorithms:

  ◦ Limit calls to public network to amount (monthly, resets on first day of the month) – In order to prevent abuse, you can assign a money limit for the total costs of outgoing external calls. When the cost of the calls exceeds this limit, the user will no longer be able to make calls to external destinations. If you do not want to limit the user, select the `Unlimited` check box.

  ◦ Limit calls from public network to amount (monthly, resets on first day of the month) – In order to prevent abuse, you can assign a money limit for the total costs of incoming external calls. When the cost of the calls in a month exceeds this limit, the user will no longer be able to receive calls from external numbers. If you do not want to limit the user, select the `Unlimited` check box.

  ◦ Limit calls to public network to minutes – {m} in time interval {T} (monthly, resets on first day of the month) - Use this text box to specify the outgoing minutes available for external calls in a certain time interval. Always, even when there are no time intervals defined, you can select the `Anytime` option to make these minutes available at any moment, without any time constraint.

    You can use the ⊟ ⊞ buttons to remove/add available minutes for different time intervals. If there are no time intervals defined, these buttons will be grayed out.

> **Note**
>
> You can add as many outgoing minutes blocks as the number of the available time intervals. For example, if there are three time intervals, than three blocks may be added, one for each time interval.

> **Note**
>
> The **Available external outgoing minutes** field can be edited only if the **Allow outgoing external calls** option was previously enabled from the **Charging Plan Description** section.

- The Charging Segments section is used to configure the time intervals the users will be charged for their calls:

  ◦ Charge outgoing indivisible for the first {x} seconds (applies to internal and public network calls) – If an outgoing call lasts less than {x} seconds, the user will be charged the price corresponding to a {x} seconds call.

  ◦ After the first segment charge every {y} seconds – The cost of an outgoing call computes every {y} seconds, if a call lasts more than the indivisible interval {x} set above.

  ◦ Charge incoming calls indivisible for the first {w} seconds (applies only to calls from public network) – If an external incoming call lasts less than {w} seconds, the user will be charged the price corresponding to a {w} seconds call.

  ◦ After the first segment charge every {z} seconds – The cost of an external incoming call computes every {z} seconds, if a call lasts more than the indivisible interval {w} set above.

- The Fees section allows you to set up the amounts you want the users to be charged, as well as the initial credit available for their calls:

  ◦ Charge method – Two methods for charging calls are provided: Fixed prices and Relative to call cost. They are mutually exclusive and must be used based on the system application. The following charging options are available for the two methods:

    ▪ Charging fixed price – This method charges all the calls made in the same time interval the same price. It does not take into consideration the real cost of the calls (e.g. the price charged by the channel provider or the call destination). The following fields are displayed:

- Charge incoming calls {value} {currency}/second (coming from public network) – The charge for the calls received from outside the system.

  > **Note**
  >
  > This field is not available if the **Allow incoming calls from any network** option has not been selected in the **Charging Plan Description** section.

- Charge outgoing calls {value_1} {currency}/second in time interval - {time_interval} (destination is in public network) - The charge for the calls made outside the system. Use the {time_interval} drop-down list to select the time interval(s) to which this charge will apply. Always, even when there are no time intervals defined, you can select the Anytime option to set this cost for all the external outgoing calls, without any time constraint.

  You can use the ⊟ ⊞ buttons to remove/add various charges for different time intervals. If there are no time intervals defined, these buttons will be grayed out.

- Charge local calls to extensions {value} {currency}/second (destination is owned by the same client like caller) – The charge for the calls made to extensions belonging to the same client account. The default cost is free of charge.

  > **Note**
  >
  > This field is not available if the **Allow local calls to extensions owned by the same client like caller** option has not been selected in the **Charging Plan Description** section.

- Charge extended local calls to extensions {value} {currency}/second (destination is owned by other clients in the infrastructure) - The charge for the calls made to extensions that do not belong to the same client.

  > **Note**
  >
  > This field is not available if the **Allow local calls to extensions owned by the same client like caller** and the **Allow outgoing extended local calls** options have not been selected in the **Charging Plan Description** section.

- Destination exception - Use the drop-down list to select one of the available charging destination exception templates. This field is dynamically populated, depending on the selected charging method.

▪ Charging relative to call costs – This method calculates the call costs using the real amount charged by the channel provider, based on call destination. It uses the following cost function:

`n*call cost + adjustment`, where:

- `n` and `adjustment` are parameters that can be set.

For the Charging relative to call costs method, the following fields are displayed:

- Charge incoming calls {value_1} x call cost + {value_2} {currency}/ second (coming from public network)

> **Note**
>
> This field is not available if the **Allow local calls to extensions owned by the same client like caller** option has not been selected in the **Charging Plan Description** section.

- Charge outgoing calls {value_1} x call cost + {value_2} {currency}/ second (destination is in public network)

> **Note**
>
> This field is not available if the **Allow calls to public network** option has not been selected in the **Charging Plan Description** section.

- Charge local calls to extensions {value_1} x call cost + {value_2} {currency}/ second (destination is owned by the same client like caller)

> **Note**
>
> This field is not available if the **Allow local calls to extensions owned by the same client like caller** and the **Allow outgoing extended local calls** options have not been selected in the **Charging Plan Description** section.

- Charge extended local calls to extensions {value_1} x call cost + {value_2} {currency}/ second (destination is owned by other clients in the infrastructure)

- Destination exception - Use the drop-down list to select one of the available charging destination exception templates. This field is dynamically populated, depending on the selected charging method.

- The Sound Files section:

  ◦ Play custom sound file when outgoing access is blocked — Select the folder and the sound file to be played when the user tries to make a call and the external access is blocked due to charging constraints.

Edit a Postpaid Charging Plan Template

To modify an existing template, follow the next steps:

1. In the Platform Bricks Management page click the View all link that corresponds to the Postpaid charging plan brick.

2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click its name link.

3. The Edit the Postpaid Charging Plan Template page allows you to modify the desired parameters.

Charging Credit

The customer that operates under a prepaid charging plan is limited on the cost of services. Using this recharge package, the customer's credit line can be enlarged, allowing him to spent amounts with no other ongoing commitments until total consumption.

Add a New Charging Credit Template

To add a template, click the <u>New</u> link that corresponds to the Charging credit brick available in the Building Bricks table.

The Configure the New Charging Credit Template page allows you to set up the postpaid plan. The customizable options are grouped into several sections:

- The Brick item section contains only one field:
  - Name - Use the available text box to set a descriptive name for the charging credit.
  - Item type: Add-on, exposed in VoipNow Professional Automation - This is a standalone cloud building brick which can be used to define add-on store items for purchase.

> **Note**
>
> If, after finishing setting up a template, you want to add another one, select the **Add another charging credit** check box.

Edit a Charging Credit Template

> **Caution**
>
> When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. Deployed services are not affected by these changes!

To modify an existing template, follow the next steps:

1. In the Platform Bricks Management page click the <u>View all</u> link that corresponds to the Charging credit brick.
2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click its name link.
3. The Edit the Charging Credit Template page allows you to modify the desired parameters.

> **Note**
>
> For more details on how to modify the template, see the [Add a New Charging Credit Template](#) section.

Time Intervals

Time intervals are used to match calls to a certain period of time. This can be done for charging reasons or in order to filter the incoming/external calls.

The Time intervals cloud building brick is required by other bricks. For example, the templates belonging to the Charging plans cloud building brick cannot be set up with complete permissions (allow calls to public network) if there are no time interval templates defined.

Time Interval

Currently, this is the only template type that can be added to the Time intervals cloud building brick.

Add a New Time Interval Template

To add a template, click the [New](#) link that corresponds to the Time interval brick available in the Platform Building Bricks table.

The Configure the New Time Interval Template page allows you to customize the specific options, that are grouped into several sections:

- The Brick item section allows you to set a name for the new brick:
  - Name - Use the available text box to set a descriptive name for the time interval.
  - Item type: Resource, required by other bricks - This is a resource cloud building brick which can be only used to define standalone building bricks.
- The Time Interval Definition section allows you to choose the time interval's matching algorithm:
  - Matching algorithm – There are two ways of matching the calls in relation with the time frame they have been placed:
    - Individual days – This method allows you to match the same time interval in different days. See the example below.
    - Interval – This method allows you to match a continuous time interval that extends over several days.

◦ Timezone – Use the drop-down list to select the time zone in which your time interval is defined. The default value is `server_default`.

- The Matching intervals section allows you to set up multiple time intervals for the same template, in order to have a more complex and comprehensive overview of the user's calls. The following parameters may be customized:

  ◦ Start at hour and End at hour – Use the available text boxes to specify the time interval limits.

  ◦ Start weekday and End weekday – Use these drop-down lists to select the days of the week that define the time interval.

  ◦ Start day of month and End day of month – Use these drop-down lists to select the days of the month that define the time interval.

  ◦ Month - Use this drop-down list to select the month that defines the time interval.

  Use the ⊞ ⊟ buttons if you want to add/remove several time intervals to/from the time interval template.

Example of a time interval defined in individual days

In the below image, the time interval matches the calls made or received between 10:25 – 22:51 hours, on Sunday, Monday, Tuesday, Wednesday, Thursday, between 10 and 25 of March.

A time interval defined in individual days

Example of a time interval defined using the interval method.

In the below image, the time interval matches the calls made or received between Sunday, 10:25 and Thursday, 22:51, between 10 and 25 of March.

Time interval definition

Name *   Interval

Matching algorithm   Interval

Matching intervals

Start at hour *   08 : 00

End at hour *   20 : 00

Start weekday   Monday

End weekday   Friday

Start day of the month   1

End day of the month   31

Month   --

A continuous time interval

Note

If, after finishing setting up a template, you want to add another one, select the **Add another time interval** check box.

Note

If you do not select the **Add another time interval** check box, you will be redirected to the **Edit the Time Interval Template** page.

Edit a Time Interval Template

⚠ **Caution**

When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. The deployed services are not affected by these changes!

To modify the an existing template, follow the next steps:

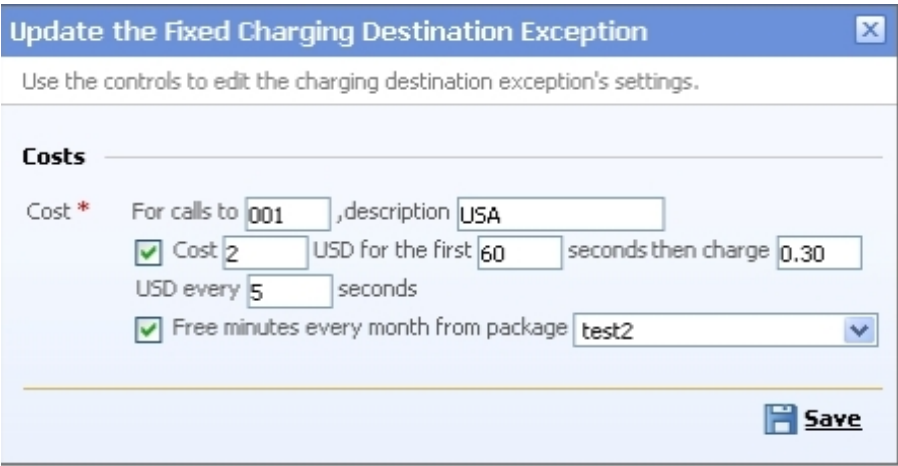1. In the Platform Bricks Management page click the [View all](#) link that corresponds to the Time interval brick.

2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click the name.

The Edit the Time Interval Template page allows you to modify the desired parameters described in the [Add a New Time Interval Template](#) section.

> ### Note
>
> If you want to add new time intervals to the existing template, select the **Add matching intervals** check box. This will unlock the **Time Interval Definition** and the **Matching Intervals** sections.

The template's time intervals are displayed in the Time Intervals table. The following information is provided:

- Hours - The interval's start and end time in `hh:mm` format. Click this link if you want to modify the interval's parameters. A pop-up panel will open, allowing you to edit the Matching Intervals properties. To save the changes, click the Save link. For more information, see the [Add a New Time Interval Template](#) section.

  Example

  Update the time intervals details

- Week days - The interval's start and end days of the week. The following convention is used:
  - 1 – Sunday
  - 2 – Monday

- 3 – Tuesday
- 4 – Wednesday
- 5 – Thursday
- 6 – Friday
- 7 – Saturday
- Month days - The interval's start and end days of the month.
- Month - The month the interval's matching algorithm applies to.

The time intervals list can be sorted by name. To do so, click a table header link. A highlighted table header marks the criteria used to sort the table and the arrow indicates how the time intervals list was sorted. The sort direction can be changed by another click on the corresponding header.

You can change the number of entries per page by clicking the 10, 25 and 100 links available in the right side of the table. The total number of records is shown in the left side.

To remove a time interval, select its corresponding check box and click the ✖ Remove selected link.

> ⚠️ Caution
>
> At least one time interval must be present in the template!

> 📝 Note
>
> You can filter the columns displayed in the table by clicking the ⊞ Show columns link. After selecting the desired columns, click **Apply** to save the changes. Likewise, if you cannot see some of the columns, it is likely that they have been disabled using this control.

Free Minutes Packages

This cloud building brick allows you to configure free minutes packages to be granted to the users.

The Free minutes packages cloud building brick is not standalone and it is required by the Destination exceptions brick.

Free Minutes Package

This is the only template type that can be added to the Free minutes packages cloud building brick.

Add a New Free Minutes Package Template

To add a template, click the New link that corresponds to the Free minutes packages brick available in the Building Bricks table.

The Configure the New Free Minutes Package Template page allows you to customize the specific options, that are grouped into several sections:

- The Brick item section contains only one field:

  - Name - Use the available text box to set a descriptive name for the package.

  - Item type: Resource, required by other bricks - This is a resource cloud building brick which can be only used to define standalone building bricks.

- Use the Free Minutes Package section to specify the free minutes:

  - Included minutes - Use the available text box to fill in the number of free minutes you want to offer for this package.

> **Note**
>
> If, after finishing setting up a template, you want to add another one, select the **Add another free minutes package** check box.

Edit a Free Minutes Package Template

> **Caution**
>
> When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. The deployed services are not affected by these changes!

To modify an existing template, follow the next steps:

1. In the Platform Bricks Management page click the View all link that corresponds to the Free minutes package brick.

2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click its name link.

3. The Edit the Free Minutes Package Template page allows you to modify the allocated number of free minutes.

Destination Exceptions

The destination exceptions allow you to set different charging algorithms for certain area codes that override the costs configured in a charging plan. In this way, the customers will pay different fees depending on the area code they are calling.

This cloud building brick is not standalone and it is required by the Charging plans brick.

Fixed Charging Destination Exception

This brick can be used only for the charging plans with the Fixed prices charging method enabled.

Add a New Fixed Charging Destination Exception Template

To add a template, click the New link that corresponds to the Fixed charging destination exception brick available in the Cloud Building Bricks table.

The Configure the New Fixed Charging Destination Exception Template page allows you to customize the specific options, that are grouped into several sections:

- The Brick item section contains only one field:
  - Name - Use the available text box to set a descriptive name for the charging destination exception.
  - Item type: Resource, required by other bricks - This is a resource cloud building brick which can be only used to define standalone building bricks.

- The Upload Cost File section provides the controls required to upload a cost file:

> **Note**
>
> The cost file entries must be in the following format:
>
> - {Area code},{Indivisible cost},{Indivisible interval}, {Cost},{Charging interval}
>
> - {Area code},{Indivisible cost},{Indivisible interval}, {Cost},{Charging interval}, {Description}
>
> Example of a valid entry: 021,1,60,0.20,10,Metropolitan

◦ Charging method - This field displays the method chosen to charge the calls: `Fixed prices`.

◦ Agree to replace ALL destination costs – Select this check box to confirm the fact that the uploaded file will replace all the exception costs currently associated with the charging plan.

> **Note**
>
> When this option is selected, the **Costs** section is disabled.

◦ Upload cost file – Click the ⬚ button to locate the `.csv` file on your computer.

> **Note**
>
> This option is available only if the **Agree to replace ALL destination costs** check box is selected.

◦ Field separator – Use this text box to specify the character that separates the values in the `.csv` file. The default character is ',' (comma).

- The Costs section allows you to manually add charging destination exceptions costs:

  ◦ For calls to {area code}, description {description}, where:

    ▪ {area code} - Use this text box to specify the destination area code to which you want to impose the charging exception.

    ▪ {description} - Use this text box to give a brief cost description.

  ◦ Cost {indivisible cost} {currency} for the first {indivisible interval} seconds, then charge {cost} {currency} every {charging interval} seconds - Select this check box if you wish to define an exception cost for the calls initiated to the chosen area code:

    ▪ {indivisible cost} – Use this text box to set up a fixed cost that will be charged even if the call duration is less than {indivisible interval}.

    ▪ {currency} – This is the system currency, as set up in the 🐸 Setup >> Behaviour >> General tab.

    ▪ {indivisible interval} - If an outgoing call lasts less than {{indivisible interval} seconds, the user will be charged the price corresponding to a {indivisible interval} seconds call. Use this text box to specify the number of seconds.

- ▪ {cost} — Use this text box to set up a fixed cost for all the outgoing calls.

- ▪ {charging interval} - VoipNow Professional computes the cost of an outgoing call every {charging interval} seconds, if a call lasts more than {indivisible interval} previously set. Use this text box to specify the number of seconds.

- ◦ Free minutes every month from package {free minutes package} - Select this check box if you wish to grant a free minutes package for the chosen area code:

  - ▪ {free minutes package} - Use the available drop-down list to select a free minutes package.

  > **Note**
  >
  > At least one **Free minutes package** template must be defined.

Use the ⊞ ⊟ buttons if you want to add/remove several time destination exceptions to the current template.

> **Note**
>
> If, after finishing setting up a template, you want to add another one, select the **Add another fixed charging destination exception** check box.

> **Note**
>
> If you do not select the **Add another fixed charging destination exception** check box, you will be redirected to the **Edit the Fixed Charging Destination Exception** page.

Edit a Fixed Charging Destination Exception Template

> **Caution**
>
> When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. The deployed services are not affected by these changes!

To modify the an existing template, follow the next steps:

1. In the Platform Bricks Management page click the <u>View all</u> link that corresponds to the Fixed charging destination exception brick.

2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click its name link.

The Edit the Fixed Charging Destination Exception Template page allows you to modify the desired parameters described in the Add a New Fixed Charging Destination Exception Template section and to add new destination exceptions to the existing template.

The template's destination exceptions are displayed in the Current Cost Exceptions table. The following information is provided:

- Area code - The area code the cost exception is applied to. Click this link if you want to modify the charging algorithm. A pop-up panel will open, allowing you to edit the Costs section. To save the changes, click the 🖫 Save link. For more information, see the Add a New Fixed Charging Destination Exception Template section.

Example

Update the fixed charging destination exception

- Cost algorithm - The detailed cost formula applied to the area code.

- Free minutes - The number of free minutes allocated monthly to the area code. The free minutes package is displayed between parentheses.

- Description - The message you entered for the destination exception cost.

The cost exceptions list can be sorted by area code and description. To do so, click a table header link. A highlighted table header marks the criteria used to sort the table and the arrow indicates how the cost exceptions list was sorted. The sort direction can be changed by another click on the corresponding header.

You can change the number of entries per page by clicking the 10, 25 and 100 links available in the right side of the table. The total number of records is shown in the left side.

> **Note**
>
> If you want to save the cost exceptions for later use, click the 🔁 Export all exceptions link. Then, save the .csv file to the desired location.

> **Note**
>
> To remove a cost exception, select its corresponding check box and click the ✖ Remove selected link.

> **Note**
>
> You can filter the columns displayed in the table by clicking the ⊞ Show columns link. After selecting the desired columns, click **Apply** to save the changes. Likewise, if you cannot see some of the columns, it is likely that they have been disabled using this control.

Relative Charging Destination Exception

This brick can be used only for the charging plans with the Relative to call cost charging method enabled.

Add a New Relative Charging Destination Exception Template

To add a template, click the New link that corresponds to the Relative charging destination exception brick available in the Cloud Building Bricks table.

The Configure the New Relative Charging Destination Exception Template page allows you to customize the specific options, that are grouped into several sections:

- The Brick item section contains only one field:
  - Name - Use the available text box to set a descriptive name for the charging destination exception.
- The Upload Cost File section provides the controls required to upload a cost file:

> **Note**
>
> The cost file entries must be in the following format:
> - {Area code},{n},{adjustment},{Charging interval}
> - {Area   code},{n},{adjustment},{Charging   interval}, {Description}

Example of a valid entry: `021,1,0.20,60,Metropolitan`

◦ Charging method - This field displays the method chosen to charge the calls: `Relative to call cost`.

◦ Agree to replace ALL destination costs — Select this check box to confirm the fact that the uploaded file will replace all the exception costs currently associated with the charging plan.

> **Note**
>
> When this option is selected, the **Costs** section is disabled.

◦ Upload cost file — Click the ⬜ button to locate the `.csv` file on your computer.

> **Note**
>
> This option is available only if the **Agree to replace ALL destination costs** check box is selected.

◦ Field separator — Use this text box to specify the character that separates the values in the `.csv` file. The default character is ',' (comma).

• The Costs section allows you to manually add charging destination exceptions costs:

  ◦ For calls to `{area code}`, description `{description}`, where:

    ▪ `{area code}` - Use this text box to specify the destination area code to which you want to impose the charging exception.

    ▪ `{description}` - Use this text box to give a brief cost description.

  ◦ Cost `{n}` x call cost + `{adjustment}` `{currency}`/`{charging interval}` seconds for call to `{area code}` - Select this check box if you wish to define an exception cost for the calls initiated to the chosen area code:

    ▪ `{n}` - Use this text box to specify the call cost's multiplier based on the real cost charged by the channel.

    ▪ `{adjustment}` - Use this text box to specify the amount that will be added to the call cost every `{charging interval}` seconds.

    ▪ `{currency}` — This is the system currency, as set up in the 🧩 Setup >> Behaviour >> General tab.

- {charging interval} - Use this text box to specify the number of seconds after which the {adjustment} will be added to the call cost.

  ◦ Free minutes every month from package {free minutes package} - Select this text box if you wish to grant a free minutes package for the chosen area code:

    - {free minutes package} - Use the available drop-down list to select a free minutes package.

      > **Note**
      >
      > At least one **Free minutes package** template must be defined.

Use the ⊞ ⊟ buttons if you want to add/remove several time destination exceptions to the current template.

> **Note**
>
> If, after finishing setting up a template, you want to add another one, select the **Add another relative charging destination exception** check box.

> **Note**
>
> If you do not select the **Add another relative charging destination exception** check box, you will be redirected to the **Edit the Relative Charging Destination Exception** page.

Edit a Relative Charging Destination Exception Template

> **Caution**
>
> When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. The deployed services are not affected by these changes!

To modify the an existing template, follow the next steps:

1. In the Platform Bricks Management page click the View all link that corresponds to the Relative charging destination exception brick.

2. From the templates list available in the opened pop-up panel, choose the template you want to edit and click its name link.

The Edit the Relative Charging Destination Exception Template page allows you to modify the desired parameters described in the Add a New Relative Charging Destination Exception Template section and to add new destination exceptions to the existing template.

The template's destination exceptions are displayed in the Current Cost Exceptions table. The following information is provided:

- Area code - The area code the cost exception is applied to. Click this link if you want to modify the charging algorithm. A pop-up panel will open, allowing you to edit the Costs section. To save the changes, click the 🖫 Save link. For more information, see the Add a New Relative Charging Destination Exception Template section.

Example

Update the relative charging destination exception

- Cost algorithm - The detailed cost formula applied to the area code.

- Free minutes - The number of free minutes allocated monthly to the area code. The free minutes package is displayed between parentheses.

- Description - The message you entered for the destination exception cost.

The time cost exceptions list can be sorted by area code and description. To do so, click a table header link. A highlighted table header marks the criteria used to sort the table and the arrow indicates how the cost exceptions list was sorted. The sort direction can be changed by another click on the corresponding header.

You can change the number of entries per page by clicking the 10, 25 and 100 links available in the right side of the table. The total number of records is shown in the left side.

> **Note**
>
> If you want to save the cost exceptions for later use, click the 🐳 Export all exceptions link. Then, save the `.csv` file to the desired location.

> **Note**
>
> To remove a cost exception, select its corresponding check box and click the ✖ Remove selected link.

> **Note**
>
> You can filter the columns displayed in the table by clicking the ▦ Show columns link. After selecting the desired columns, click **Apply** to save the changes. Likewise, if you cannot see some of the columns, it is likely that they have been disabled using this control.

Account Limits

These bricks allow you to modify the permissions and limits of an already deployed reseller or client account in order to extend their initially given resources and access. The feature is very useful as it allows existing clients to manage their accounts according to requirements that may appear unpredictably.

The bricks can be added as add-ons at any moment after the account is deployed.

Reseller Account Limits

This brick can be used only for the reseller accounts in order to change their current access level and to modify the limits imposed by their corresponding brick.

Add a New Reseller Account Limits Template

The Configure the Reseller Account Limits Template page allows you to set up the new template using the controls grouped into the following fieldsets:

- Brick Item

  This fieldset allows you to name the template:

  ◦ Name - Use the available text box to set a descriptive name for the new template.

  ◦ Item type - The item type, in this case Add-on, exposed in VoipNow Automation.

- Permissions

  Use the available controls to choose the permissions that will be enabled for the reseller account this add-on will be added to. For each permission, you have the following options:

  ◦ Do not change – When you choose this option, the corresponding permission will not be modified.

  ◦ Enable – When you choose this option, the corresponding permission will be enabled for all the resellers the add-on will be used for.

  > **Note**
  >
  > For the **MyVoipNow** feature, you may choose using the available drop-down list one of four options:
  >
  > ◦ Do not change
  >
  > ◦ None
  >
  > ◦ Standard
  >
  > ◦ Premium

  > **Note**
  >
  > You may also set the **Allow to provision devices** level. Use the drop-down list to select one of the four available options:
  >
  > ◦ Do not change
  >
  > ◦ None
  >
  > ◦ View
  >
  > ◦ Modify

  > **Note**
  >
  > For a detailed explanation upon each permission, see the this section.

- Limits

  Use the available controls to set new limits for the reseller accounts that will use this add-on. More information about the available limits can be found here .

  For each limit, you can use the following formula:

  {action} {value} {value_type}

  where:

◦ {action} - Use the first drop-down list to choose the action to be performed on the existing limits:

- Do not change — When you select this option, the corresponding limit will not be modified. The other two controls are disabled.

- Unlimited — When you select this option, the corresponding limit will be set to unlimited. The other two controls are disabled.

- Increase (+) — Select this option if you want to set a higher limit for the reseller accounts. Use the {value_type} drop-down list to select the increase method: units or %. Use the {value} text box to specify the number of units or the percent by which the corresponding limit is increased.

◦ {value} - This text box can be used to specify the amount with which the existing limit is increased.

◦ {value_type} - Use the drop-down list to select how the limit will be increased:

- Units - The limit will be modified exactly with the given {value}.

- % - The limit will be modified with the percentage specified in the {value} text box.

Also, if required, you can change the number of days the Account expires in using the same controls described before. The new expiration date is callculated, in case it is not set to Unlimited, with the following algorithm:

{current_day} + {x} days

Edit a Reseller Account Limits Template

⚠ Caution

When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. Deployed services are not affected by these changes!

The Edit the Reseller Account Template page allows you to modify the desired parameters, grouped into the following fieldsets:

- Brick Item
- Permissions
- Limits

> **Note**
>
> For more details on how to modify the template, see this section.

Client Account Limits

This brick can be used only for the client accounts in order to change their current access level and to increase the limits imposed by their corresponding brick.

Add a New Client Account Limits Template

The Configure the Client Account Limits Template page allows you to set up the new template using the controls grouped into the following fieldsets:

- Brick Item

  This fieldset allows you to name the template:

  ◦ Name - Use the available text box to set a descriptive name for the new template.

  ◦ Item type - The item type, in this case Add-on, exposed in VoipNow Automation.

- Permissions

  Use the available controls to choose the permissions that will be enabled for the client account this add-on will be added to. For each permission, you have the following options:

  ◦ Do not change — When you choose this option, the corresponding permission will not be modified.

  ◦ Enable — When you choose this option, the corresponding permission will be enabled for all the clients the add-on will be used for.

> **Note**
>
> For the **MyVoipNow** feature, you may choose using the available drop-down list one of four options:
>
> ◦ Do not change
>
> ◦ None
>
> ◦ Standard
>
> ◦ Premium

> **Note**
>
> You may also set the **Allow to provision devices** level. Use the drop-down list to select one of the four available options:
>
> ◦ `Do not change`
>
> ◦ `None`
>
> ◦ `View`
>
> ◦ `Modify`

> **Note**
>
> For a detailed explanation upon each permission, see the [this] section.

- Limits

  Use the available controls to set new limits for the client accounts that will use this add-on. More information about the available limits can be found [here] .

  For each limit, you can use the following formula:

  `{action} {value} {value_type}`

  where:

  ◦ `{action}` - Use the first drop-down list to choose the action to be performed on the existing limits:

  - `Do not change` — When you select this option, the corresponding limit will not be modified. The other two controls are disabled.

  - `Unlimited` — When you select this option, the corresponding limit will be set to `unlimited`. The other two controls are disabled.

  - `Increase (+)` — Select this option if you want to set a higher limit for the client accounts. Use the `{value_type}` drop-down list to select the increase method: `units` or `%`. Use the `{value}` text box to specify the number of units or the percent by which the corresponding limit is increased.

  ◦ `{value}` - This text box can be used to specify the amount with which the existing limit is `increased`.

  ◦ `{value_type}` - Use the drop-down list to select how the limit will be `increased`:

  - `Units` - The limit will be modified exactly with the given `{value}`.

- **%** - The limit will be modified with the percentage specified in the {value} text box.

Also, if required, you can change the number of days the Account expires in using the same controls described before. The new expiration date is callculated, in case it is not set to Unlimited, with the following algorithm:

{current_day} + {x} days

Edit a Client Account Limits Template

⚠ Caution

 When editing, have in mind that any modification made to this cloud building brick is immediately reflected in the items currently using this brick. Deployed services are not affected by these changes!

The Edit the Client Account Template page allows you to modify the desired parameters, grouped into the following fieldsets:

- Brick Item
- Permissions
- Limits

📝 Note

For more details on how to modify the template, see [this](#) section.

Platform Bricks

The platform bricks are the composing elements of every plug-in, therefore they have an utmost importance in VoipNow Automation.

The Platform Bricks Management page allows you to:

- View the Cloud Building Bricks for all the supported platform plug-ins.

  📝 Note

  For the moment, only the **VoipNow Professional account** platform plug-in is available and therefore only its cloud building bricks are displayed in this list.

- Search for specific cloud building bricks.

- Manage all the Items defined for a certain cloud building brick.
- Add new items.

 Note

For more information about the **Cloud Building Bricks** list, check this section.

Chapter 8
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.

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