Wholesale BSS User Guide

Date: Sunday, December 22, 2024

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Carrier Profiles

Carrier Profiles element is used to manage your interconnected carriers and all related information.

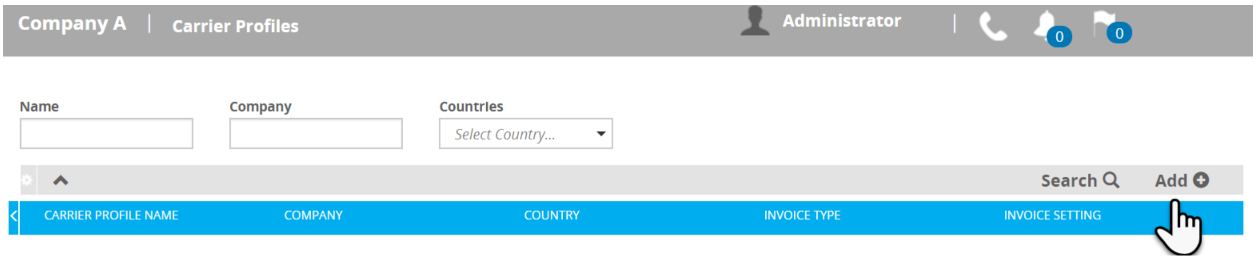
To access Carrier Profiles section, navigate to Business Partner Module and click on Carrier Profiles component:

Add a Carrier Profile

To add and configure a Carrier Profile, follow the below steps:

1. From the top right corner of the Carrier Profiles page, click on the Add button.

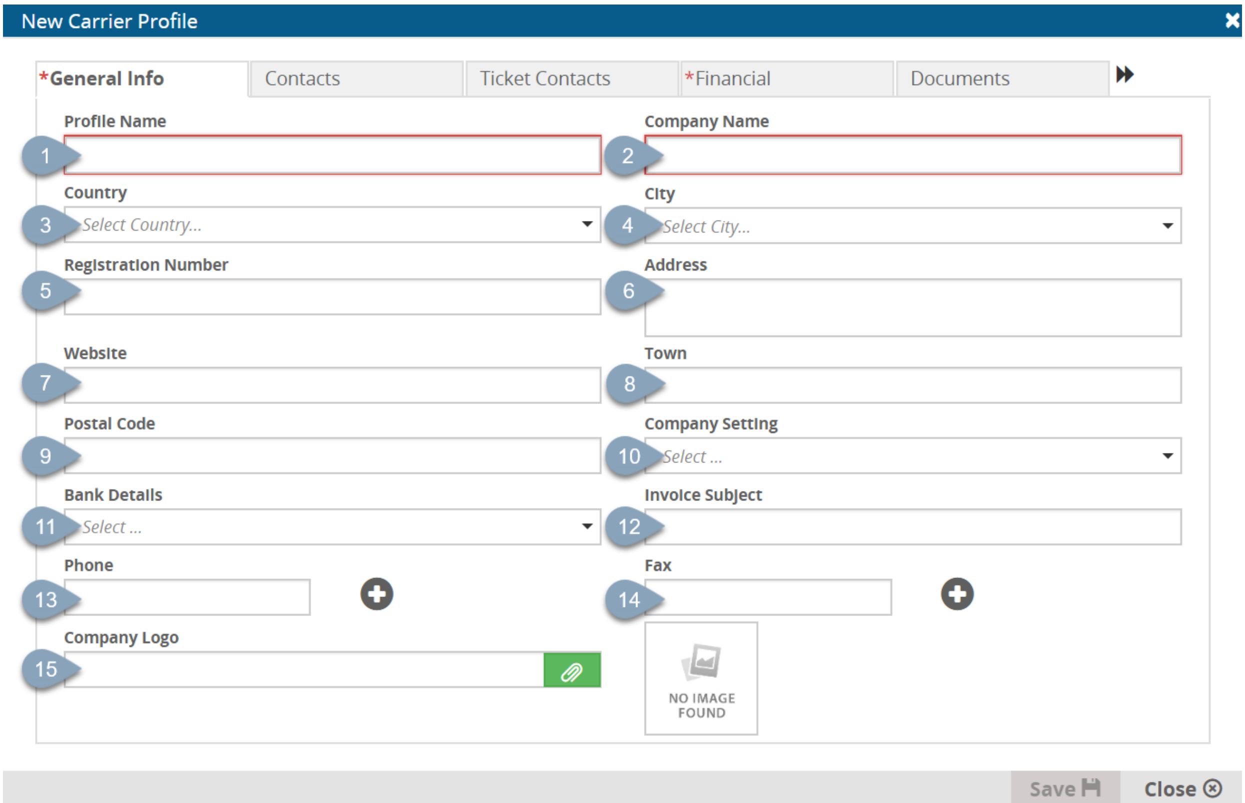
Add a Carrier Profile-Screenshot



2. "**New Carrier Profile**" window will open with several tabs.

Configure the ***General Info*** tab details:

Carrier Profile - General Info tab- Screenshot



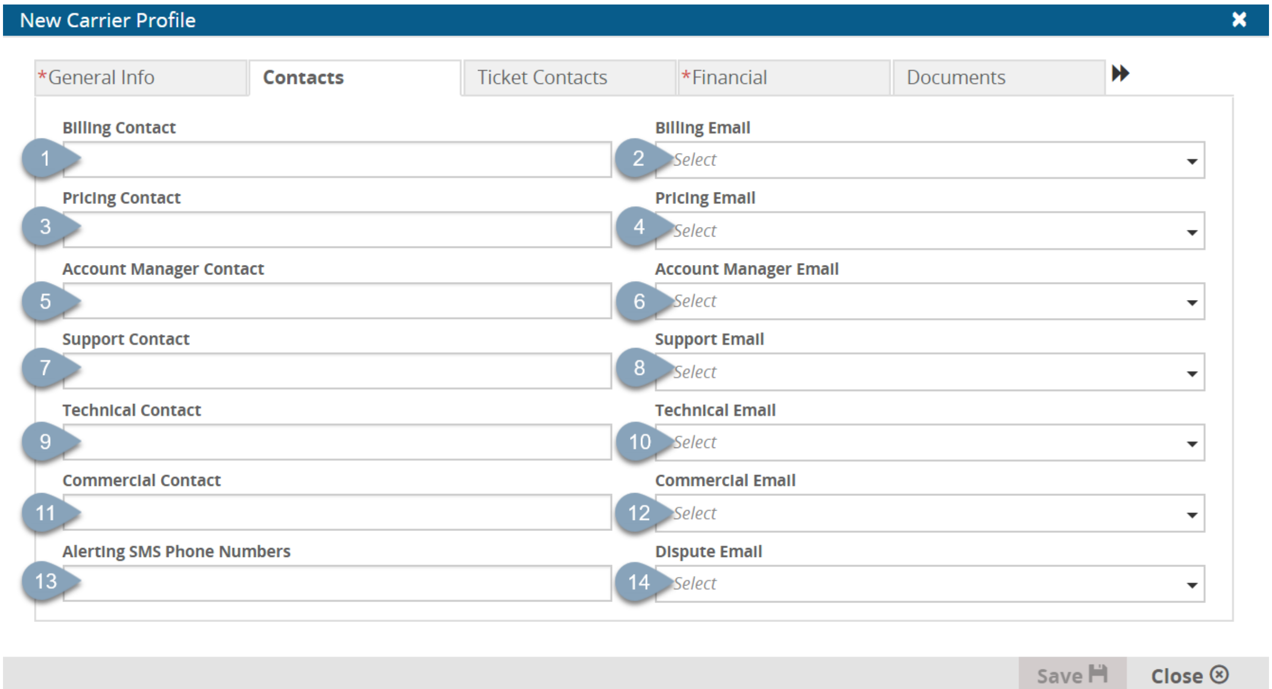
The table below describes each of the fields indicated by the markers, including required actions:

Rf	Field	Description	Action
1	**Profile Name** (mandatory)	Determines the name by which this Carrier will be known "Profile Name" must be unique	Enter the required Profile name
2	**Company name** (mandatory)	Determines the Company registered name	Enter the required Company name
3	**Country**	Determines Country of company location. List will include pre-defined Country names, refer to [Administration>Lookup>Countries]() When selecting a country, the corresponding cities (if pre-defined) appears in the combo of "City"	Select the Country of company location from the drop-down list of all available
4	**City**	Determines the City of Company location List will include pre-defined City names associated to previously selected country, refer to [Administration>Lookup>Cities]()	Select the City of Company location

5	**Registration Number**	Determines Company Registration Number	Enter Company Registration Number
6	**Address**	Determines Address of Company	Enter Address of Company
7	**Website**	Determines Website of Company	Enter Website of Company
8	**Town**	Determines Town of Company	Enter Town of Company
9	**Postal Code**	Determine Company Postal Code	Enter Company Postal Code
10	**Company Setting**	Company branch name under which you will be dealing with Carrier. Default Company name is set by default. Refer to Administration>Component Settings>Company	Select Company branch name
11	**Bank Details**	Company Bank Details under which you will be invoicing customers Refer to Administration>Component Settings>Bank Details	Select Bank Details from the drop-down list of all available
12	**Invoice Subject**	Invoice Subject matching expression received from a 3rd party billing application	Enter Invoice subject matching expression received from a 3rd party billing application
13	**Phone**	Determines Company Phone Number	Enter Company Phone Number, then Press on the button. Multiple Phone numbers can be added.
14	**Fax**	Determines Company Fax Number	Enter Company Fax Number, then Press on the button. Multiple Fax numbers can be added.
15	**Company Logo**	Company Logo	Upload Company Logo by clicking on the button. To remove an uploaded logo, click on the sign.

3. Configure the ***Contacts*** tab of Carrier Profile to store carrier contacts information.
This can include individual contact names and emails that can be used for email alerting, rating and billing purposes.

Carrier Profile - Contacts tab- Screenshot



The table below describes each of the fields indicated by the markers, including required actions:

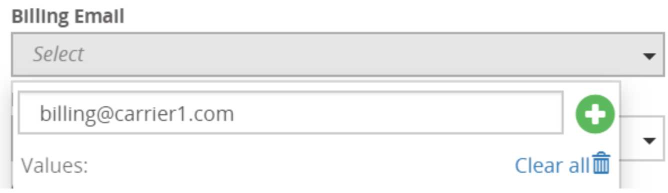
Rf	Field	Description	Action
1	**Billing Contact**	Determines Billing Contact Name	Enter Billing Contact Name
2	**Billing Email**	Determines Billing Email	Add Billing Email
3	**Pricing Contact**	Determines Pricing Contact Name	Enter Pricing Contact Name
4	**Pricing Email**	Determines Pricing Email	Add Pricing Email
5	**Account Manager Contact**	Determines Account Manager Contact Name	Enter Account Manager Contact Name
6	**Account Manager Email**	Determines Account Manager Email	Add Account Manager Email
7	**Support Contact**	Determines Support Contact Name	Enter Support Contact Name
8	**Support Email**	Determines Support Email	Add Support Email
9	**Technical Contact**	Determines Technical Contact Name	Enter Technical Contact Name
10	**Technical Email**	Determines Technical Email	Add Technical Email
11	**Commercial Contact**	Determines Commercial Contact Name	Enter Commercial Contact Name
12	**Commercial Email**	Determines Commercial Email	Add Commercial Email
13	**Alerting SMS Phone Numbers**	Determines SMS Phone Numbers	Enter SMS Phone Numbers
14	**Dispute Email**	Determines Dispute Email	Add Dispute Email

Email fields support adding multiple Email addresses

Adding Email Steps:

Step 1: Select the downward arrow of the Email field:

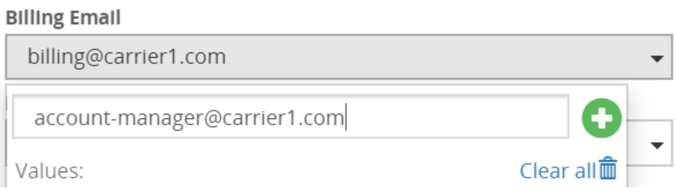
Step 2: Enter the required email:



Step 3: Press on the button.

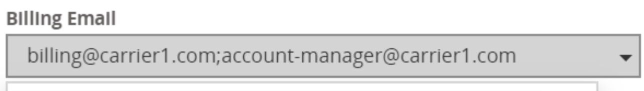
Email value will be added.

Step 4: To add a second email, enter the second required email:



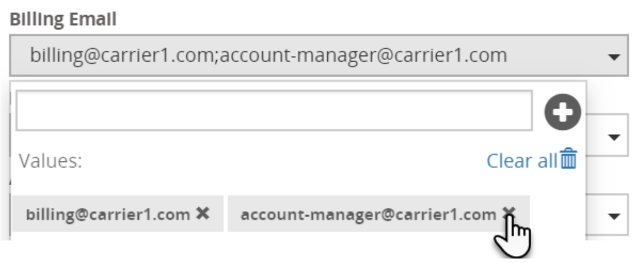
Step 5: Press on the button.

Second email will be added with a semicolon separator:



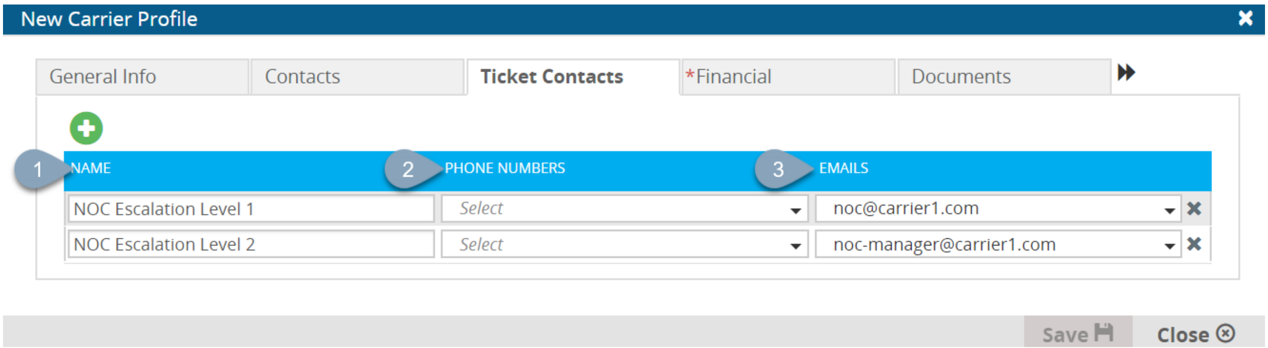
Step 6: To delete an email, open the downward arrow of the email field.

Click on the ✖ delete sign next to the email you want to delete:



4. In ***Tickets Contacts*** tab, user can include several Carrier Escalation Level Contacts to integrate with the Fault ticket service (Refer to Traffic analysis> Fault ticket):

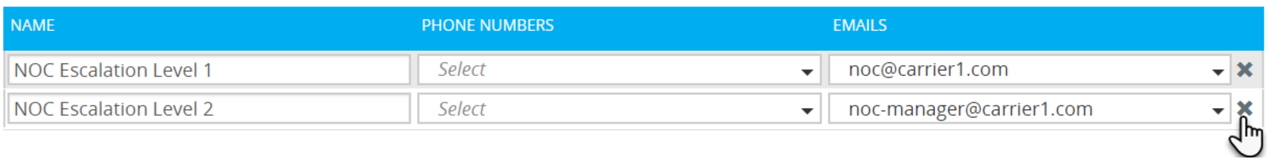
Carrier Profile - Ticket Contacts tab- Screenshot



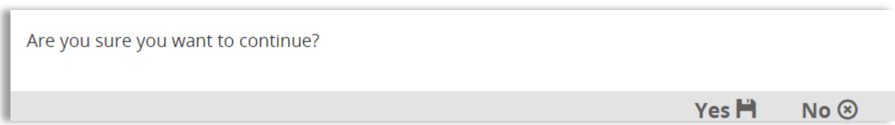
To add a new Ticket Contact, press on the button. Select fields details indicated by the markers as described below:

Rf	Field	Description	Action
1	**Name** (mandatory)	Determines Escalation Level Name for tickets escalation with carrier	Configure the Escalation Level Name for tickets escalation with carrier
2	**Phone Numbers**	Determines corresponding Phone number (s)	Add corresponding phone number, then press on the button
3	**Emails** (mandatory)	Determines email(s) for tickets escalation with carrier	Add required email for tickets escalation with carrier. Refer to Adding Email Steps.

To cancel adding Escalation level contact, click on the delete sign next to the Escalation contact that you want to delete.



To confirm the deletion action, click on **Yes** or click on **No** to cancel the deletion:



5. Complete the ***Financial*** tab of Carrier Profile to define the default financial settings that will be considered while generating Customer or Supplier invoices.

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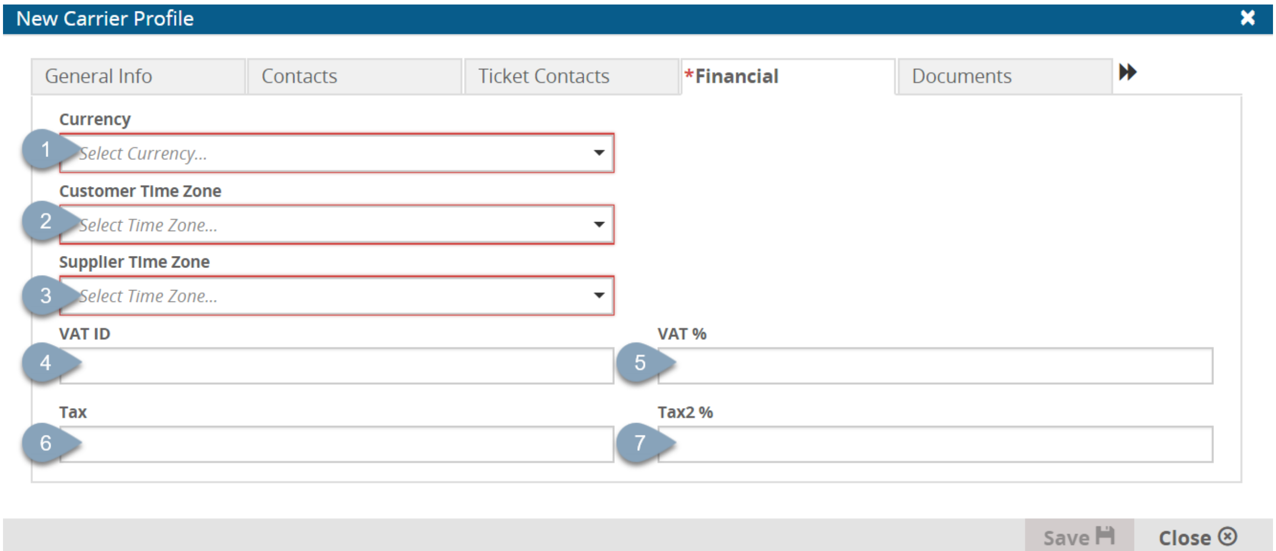
Carrier Profile – Financial tab- Screenshot

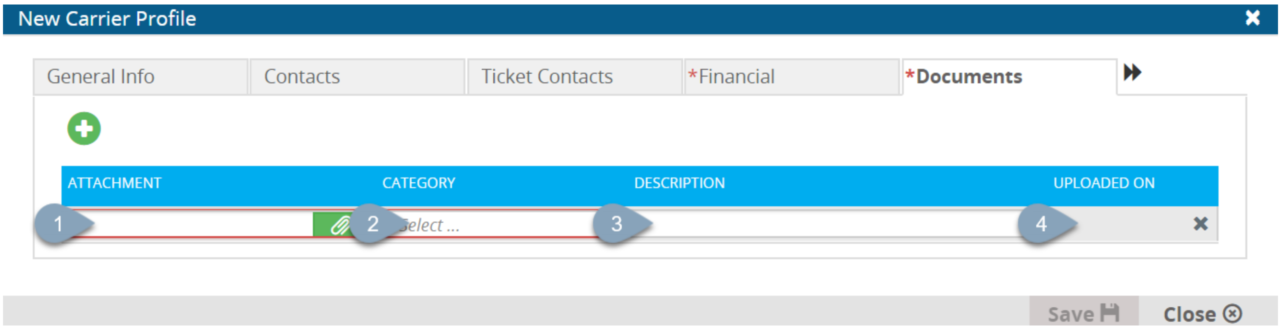


The table below describes each of the fields indicated by the markers, including required actions:

Rf	Field	Description	Action
1	**Currency** (mandatory)	Determines Currency that will be used in billing. List includes all predefined Currencies Administration>Lookups>Currencies	Choose the Currency from all available
2	**Customer Time Zone** (mandatory)	Determines Customer Time Zone that will be used in Customer invoicing. List includes all pre-defined Time Zones Administration>Lookups>Time Zone	Choose the Time Zone from a drop-down list of all available
3	**Supplier Time Zone** (mandatory)	Determines Supplier Time Zone that will be used in Supplier invoicing. List includes all pre-defined Time Zones Administration>Lookups>Time Zone	Choose the Time Zone from a drop-down list of all available
4	**VAT ID**	Determines Customer VAT ID	Enter Carrier VAT ID
5	**VAT %**	Customer VAT value in % reflected invoices	Specify a VAT value in %
6	**Tax1 %**	Basic Customer tax value in % reflected in invoices	Specify a basic tax value in %
7	**Tax2 %**	Additional Customer tax value in % reflected in Customer invoices	Specify additional tax value in %

6. In ***Documents*** tab of Carrier Profile, click on the button to add any agreement document or other attachments related to the Carrier.

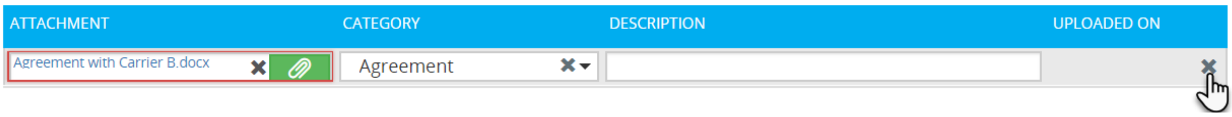
Carrier Profile – Documents tab- Screenshot



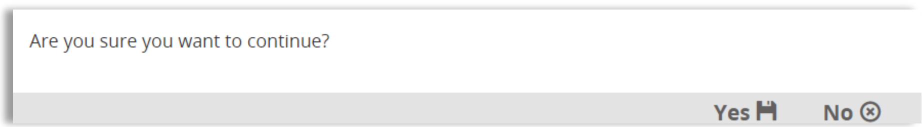
The table below describes each of the fields indicated by the markers, including required actions:

Rf	Field	Description	Action
1	**Attachment** (mandatory)	Uploaded Attachment Name	Upload attachment by clicking on the
2	**Category** (mandatory)	Determines attachment category: • Agreement: Agreement with Carrier • Attachment: any other attachment as Technical Interconnect, company registration doc or other documents	Select category of the attachment
3	**Description**	Determines Pricing Contact Name	Enter Pricing Contact Name
4	**Upload On**	Display date when the document was uploaded	

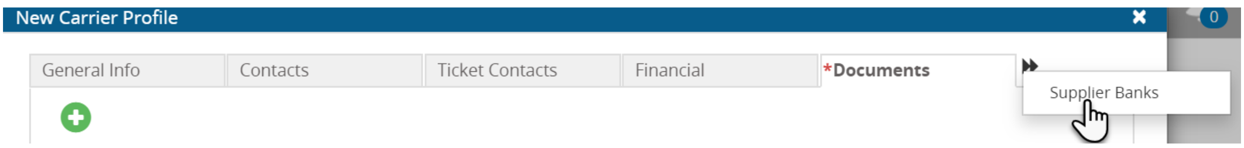
Click on the delete sign, to delete a document or cancel adding a document:



To confirm the deletion action, click on **Yes** or click on **No** to cancel the deletion:



7. Click on the sign and select **Supplier Banks** tab where user can add Carrier Bank details used to pay for Supplier invoices.



8. From the ***Supplier Banks*** tab, click on the button to add one or multiple Supplier Bank details.

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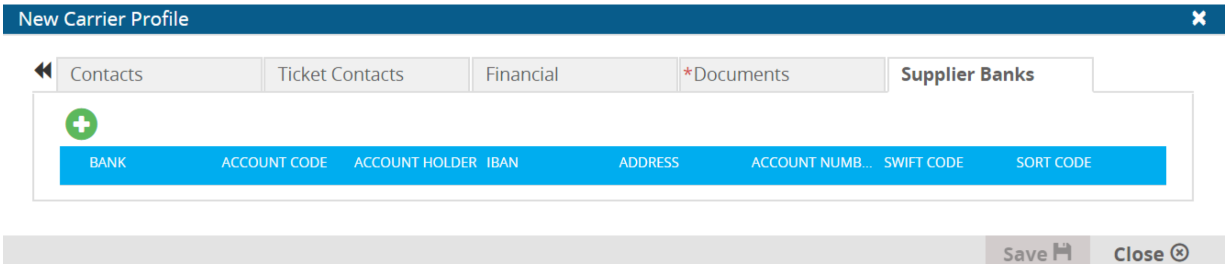
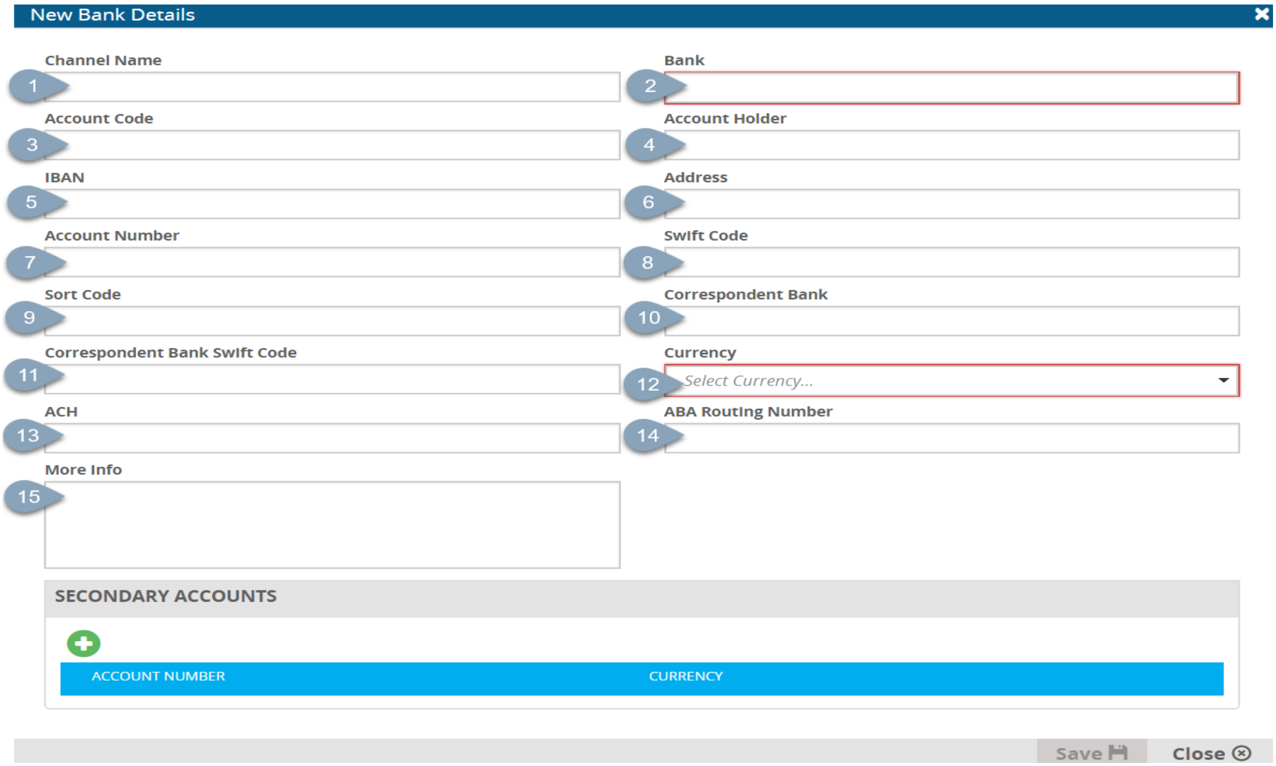
Supplier Banks tab- Carrier Profile Level- Screenshot



9. "**New Bank Details** "window will show up where user should fill Supplier details:

Supplier Bank Details-Screenshot

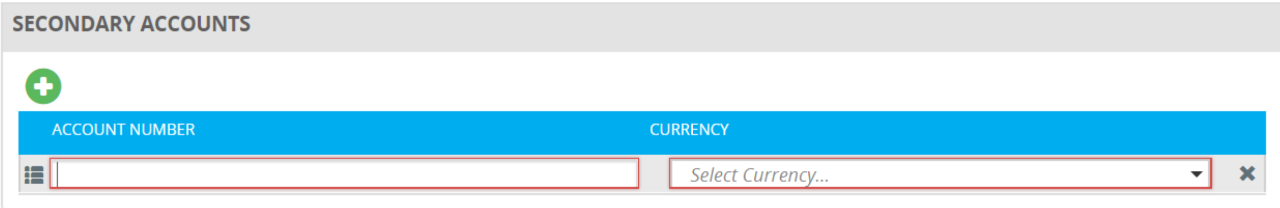


The table below describes each of the fields indicated by the markers, including required actions:

Rf	Field	Description	Action
1	**Channel Name**	Determines the Channel Name	Enter the required Channel Name
2	**Bank** (mandatory)	Determines the Bank Name	Enter Bank Name
3	**Account Code**	Determines the Bank Account Code	Enter the required Account Code
4	**Account Holder**	Determines the Account Holder	Enter Account Holder
5	**IBAN**	Determines the International Bank Account Number	Enter the required IBAN
6	**Address**	Determines the Bank Address	Enter Bank Address
7	**Account Number**	Determines the Bank Account Number	Enter the required Account Number

8	**Swift Code**	Determines the Swift Code	Enter Swift Code
9	**Sort Code**	Determines the Sort Code	Enter Sort Code
10	**Correspondent Bank**	Determines the Correspondent Bank	Enter Correspondent Bank
11	**Corresponding Bank Swift Code**	Determines the Bank Swift Code	Enter Bank Swift Code
12	**Currency** (mandatory)	Determines the Account Currency Refer to [Administration>Lookups>Currencies]	Select the corresponding Currency. The user can instantly add a new Currency by clicking on the button.
13	**ACH**	Determines the ACH	Enter ACH
14	**ABA Routing Number**	Determines the ABA Routing Number	Enter ABA Routing Number
15	**More Info**	Determines additional details	Enter More Info

Click on the button to add one or multiple secondary account number(s) with corresponding currency for same Supplier defined bank



10. Click Save to finalize adding a Carrier Profile that will be displayed on Carrier Profile page.

View / Edit a Carrier Profile

All available Carrier Profiles can be viewed or edited from the Carrier Profiles page.

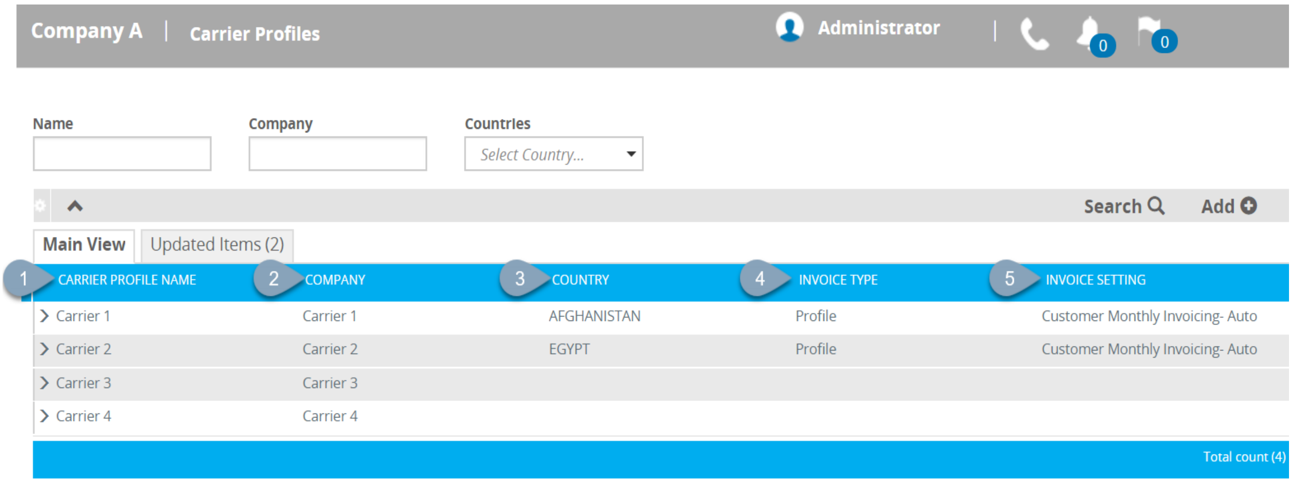
1. User can search for specific Carrier Profiles using the below filters:

Carrier Profile Search-Screenshot

Rf	Field	Description	Action
1	Name	Determines the characters included in Carrier Profiles names to be viewed or edited	Enter specific characters included in Carrier Profiles names
2	Company	Determines the characters included in Carrier Profiles company name to be viewed or edited	Enter specific characters included in Carrier Profiles company name
3	Countries	Determines Country of company location to filter	Select the Country of company location

2. To display filtered results, click on the Search button located at the right corner of the Carrier Profile page.

Carrier Profiles view- Screenshot



Carrier Profiles filtered results are presented with the following columns:

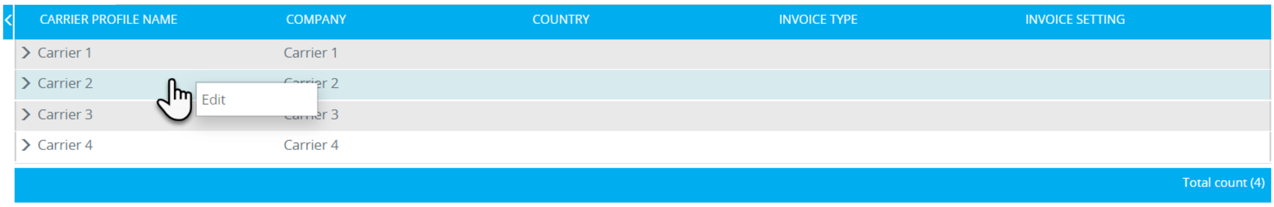
Rf	Column Name	Description
1	Carrier Profile Name	Determines the name by which this carrier will be known
2	Company	Name of the company the Carrier Profile belongs to
3	Country	Determines Country of Company location
4	Invoice Type	Determines the Customer Invoice type: • Profile: For a Financial Account configured on Carrier Profile level, a unique invoice will be generated including charges of all Carrier Accounts associated to this Carrier Profile. See Consolidated Billing section • Account: For a Financial Account configured on Carrier Account level, an individual invoice will be generated

		See [Standard Billing](#) section
5	**Invoice Setting**	Determines assigned Customer Invoice setting (Refer to Administration> Invoice settings) which defines: • Invoice Serial Pattern and File name Pattern • Invoice Template that will be used to produce the invoice • Invoice Billing Cycle and Terms • Invoice generation Minimum Amount • Invoice Manual or Automatic Generation • Invoice Auto-Email-Sending

From the upper left corner of the Carrier Profile grid, user can export the filtered Carrier Profiles result by clicking on  then on 

3. User can edit or update any filtered Carrier Profile by selecting one record, then by clicking on the **Edit** action.

Edit a Carrier Profile- Screenshot



Carrier Accounts

Carrier accounts element defines the type of business relationship with carriers to establish the terms agreed on commercially.

By shaping call directions, Carrier Account indicates to the system how to implement proper call-data processing, rating, routing and billing for carriers.

This is necessary to make sure that calls are billed to the right entity and with the right tariffs.

To access Carrier Accounts section, navigate to Business Partner Module and click on Carrier Accounts component:

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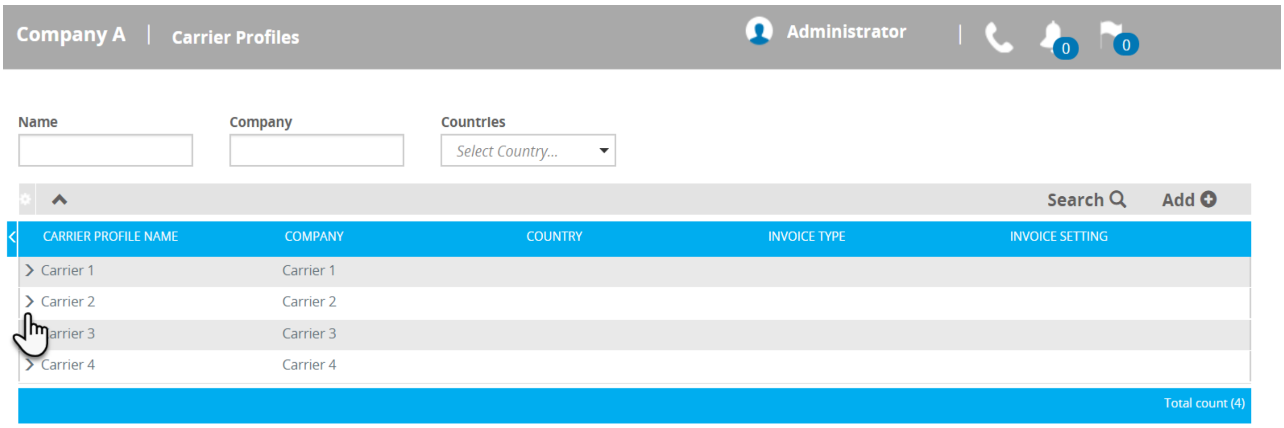
Add Carrier Account

To add and configure a Carrier Account under a specific Carrier Profile, follow the below steps:

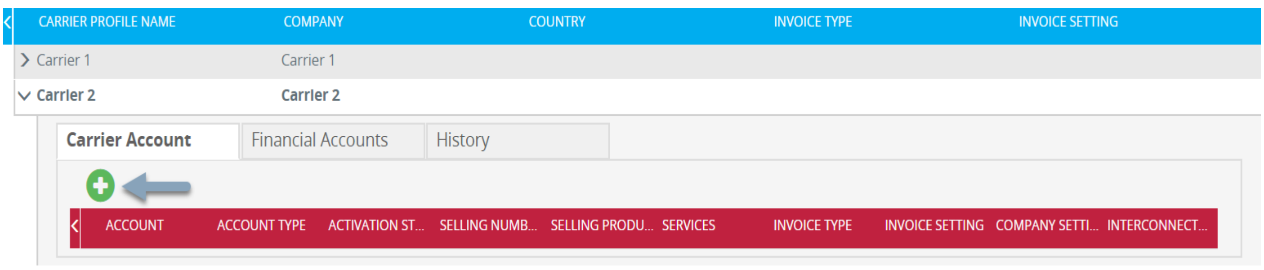
1. From the Carrier Profiles page, expand the Carrier Profile for which you want to add a new Carrier account:

Expand Carrier Profile- Screenshot



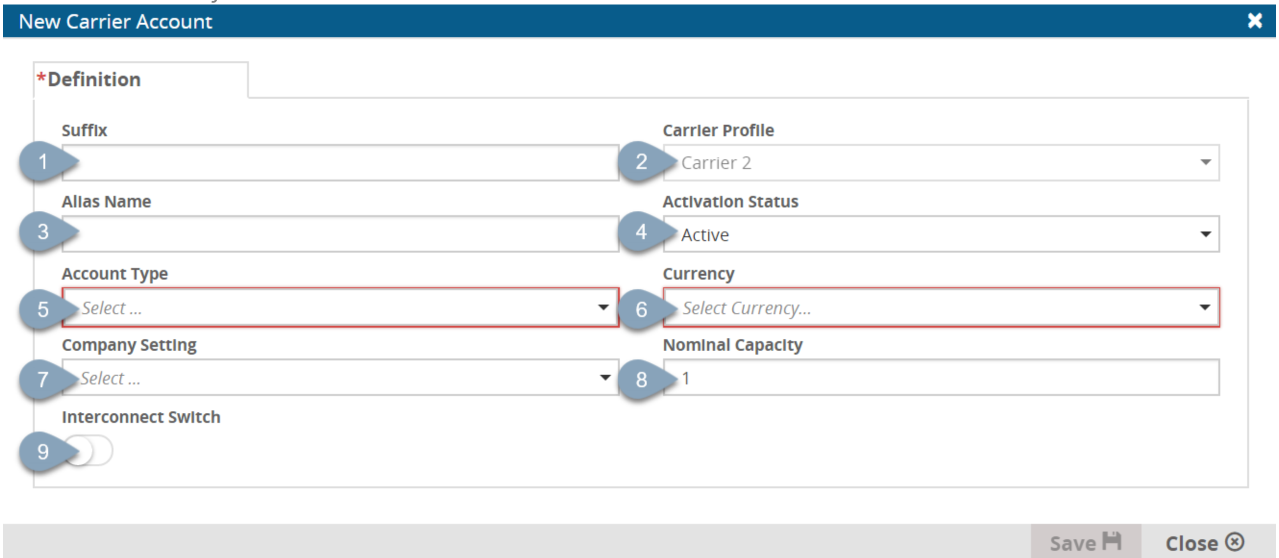
2. Several tabs will show up. From the ***Carrier Account*** tab, click on the button

Add Carrier Account- Screenshot



3. "**New Carrier Account**" window with the Carrier Account **Definition** tab will show up. Configure the ***Definition*** tab details:

Carrier Account- Definition tab



The table below describes each of the fields indicated by the markers, including required actions:

Rf	Field	Description	Action
1	**Suffix**	Determines the Post-nominal letters that follows Carrier Profile name to constitute the Carrier account name	Enter Suffix name of Carrier Account
2	**Carrier Profile**	Determines Carrier Profile under which the Carrier Account is being added	
3	**Alias Name**	Determines Carrier Account Alias name which will be used on pages where the user has permission to only see the alias name of corresponding carrier account	Enter Carrier Account Alias name
4	**Activation Status**	Determines the Activation Status of Carrier Account: • Active (Default): Active Account • Inactive: Account Disabled • Testing: shown in Traffic Analysis but not billed	Select the required Carrier Account Activation Status
5	**Account Type** (mandatory)	Determines the type of Carrier being created: • Customer: Ingress connection that will be sending traffic (to be rated and routed). • Supplier: Egress connection to which traffic will be routed (traffic will be routed to and charged based on supplier pricelist) • Exchange: Bidirectional connection to which calls are sent and from which calls are received See Carrier Account type table	Select the required Account type
6	**Currency** (mandatory)	Determines Carrier Account Pricing and standard billing Currency	Choose Currency
7	**Company Setting**	Company branch name under which you will be dealing with Carrier.	Enter Company branch name

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		Default Company name defined under Administration>Component Settings>Company will be set by default.	
8	**Interconnect Switch**	If enabled, related traffic will be considered as transit traffic and related CDRs are not billed	to Enable to Disable(default)

Customer Settings and Supplier Settings tabs become configurable based on previously defined Carrier Account type.

Carrier Account Type	**Customer Settings tab**	**Supplier settings tab**
Customer	✓	
Supplier		✓
Exchange	✓	✓

4. For Customer and Exchange Carrier Account types, fill ***Customer Settings*** tab details:

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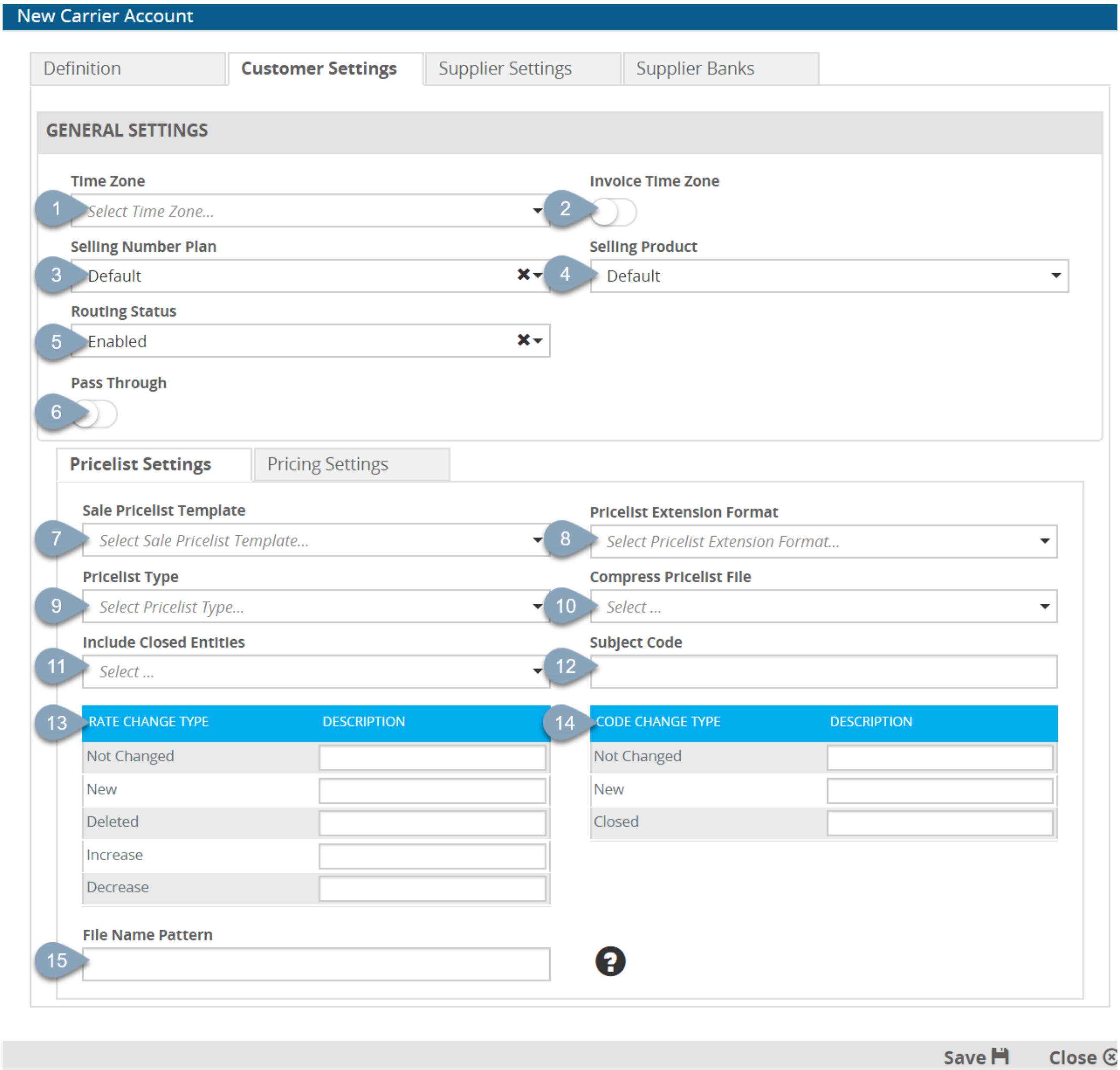
Carrier Account - Customer Settings Tab- Screenshot



The table below describes each of the fields indicated by the markers, including required actions:

Customer Settings-General Settings			
Rf	**Field**	**Description**	**Action**
1	**Time Zone**	Determines Customer Sale Time Zone. Default setting is GMT System Time zone.	Select Time Zone
2	**Invoice Time Zone**	if Enabled, configured Time Zone will be reflected in standard billing invoices (overriding Carrier Profile financial time zone settings)	to Enable to Disable (default)
3	**Selling Numbering Plan** (mandatory)	Determines Customer Selling Number Plan See Numbering Plan section	Select Selling Number Plan from all available

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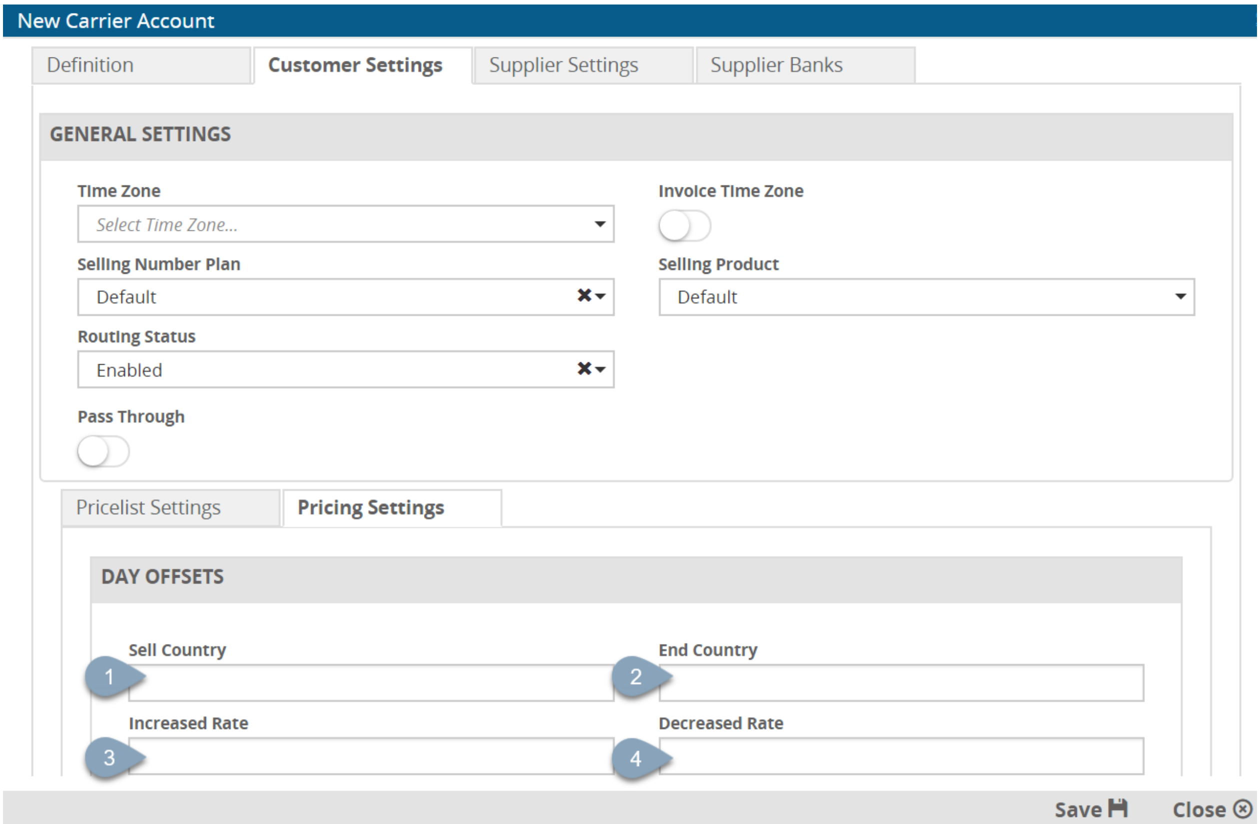
4	**Selling Product** (mandatory)	Determines Customer Selling Product depending on previously selected Selling Numbering Plan. See Selling Product section	Select Selling Product from all available
5	**Routing Status**	Determines the Customer Routing status: Enable (default): incoming calls are allowed Disable: incoming calls are blocked but can be traced in Traffic Analysis	Select between Enable or Disable
6	**Pass Through**	If enabled, the user can specify a percentage margin based on which sale rate must be calculated according to the supplier rate where the call was terminated. Sale rate =Cost rate * (1+%margin) Percentage Margin must be >=0 and <=100	 to Enable  to Disable (default)
	Customer Settings -Pricelist Settings (If not specified, default settings will be applied from system configuration level) Refer to Administration>System settings>Component Settings>Sale Area>Pricelist Settings		
Rf	**Field**	**Description**	**Action**
7	**Sale Pricelist templates**	Determines Customer Pricelist templates Refer to Administration>System Settings>Pricelist Template	Select Sale Pricelist template
8	**Pricelist Extension format**	Determines Pricelist extension to be sent to Customer (XLS, XLSX)	Select Extension
9	**Pricelist Type**	Determines Customer Pricelist Type that will be generated by System: • Full: This is an "A to Z pricelist" containing the full countries replacement with all their codes including remove pending rates. This pricelist will close any unmentioned country in it with all its codes and rates. • Country (Zone or Codes Change): This is a pricelist, which contains particular countries change and not necessarily full countries change. For every mentioned country, all Zone names and related codes should be included, as unmentioned Zones and codes for this country will be closed. • Rate Change (Partial Pricelist change): This is a pricelist with changes only on zones and codes rates included in that pricelist. Therefore, changes are only applied on the rates of the codes mentioned in the rate without closing any unmentioned zone.	Select Pricelist Type
10	**Compressed Pricelist File**	Determines if Customer Pricelist File will be: • Compressed (file will be zipped) • Not Compressed	Select if file need to be compressed or not
11	**Include Closed Entities**	Determines if closed entities will be included in Customer pricelist: • Never: Customer pricelist will not include closed offers • Only First Time: Customer pricelist will only include closed offers one time • Until Closure Date: Customer pricelist will include closed offers until Closure date	Select how closed entities will be offered in Customer pricelist

12	**Subject Code**	Incoming Subject Match Expression from a 3rd party application	Define an expression for searching of specific incoming mail subjects
13	**Rate Change type Description**	Indicates if any Rate Change status needs to be different from the existing naming Example: • Not changed: Same • New: New Rate • Deleted: Deleted Rate • Increase: Increased Rate • Decrease: Decreased Rate	Enter needed Rate type Change description
14	**Code Change type Description**	Indicates if any Code Change status needs to be different from the existing naming	Enter needed Code type Change description
15	**File Name Pattern**	Determines Sale Pricelist Name Generation Pattern that must be sent to customer.	Choose Sale Pricelist Filename Pattern by referring to the Filename Pattern Helper

5. In Customer Settings, select **Pricing Settings** sub-tab and Configure the day offsets details: (Default Settings are Sale Area System Pricing, refer to [Administration>Component Settings>Sale Area>Pricing Settings]).

Customer Settings Tab - Pricing Settings- Screenshot

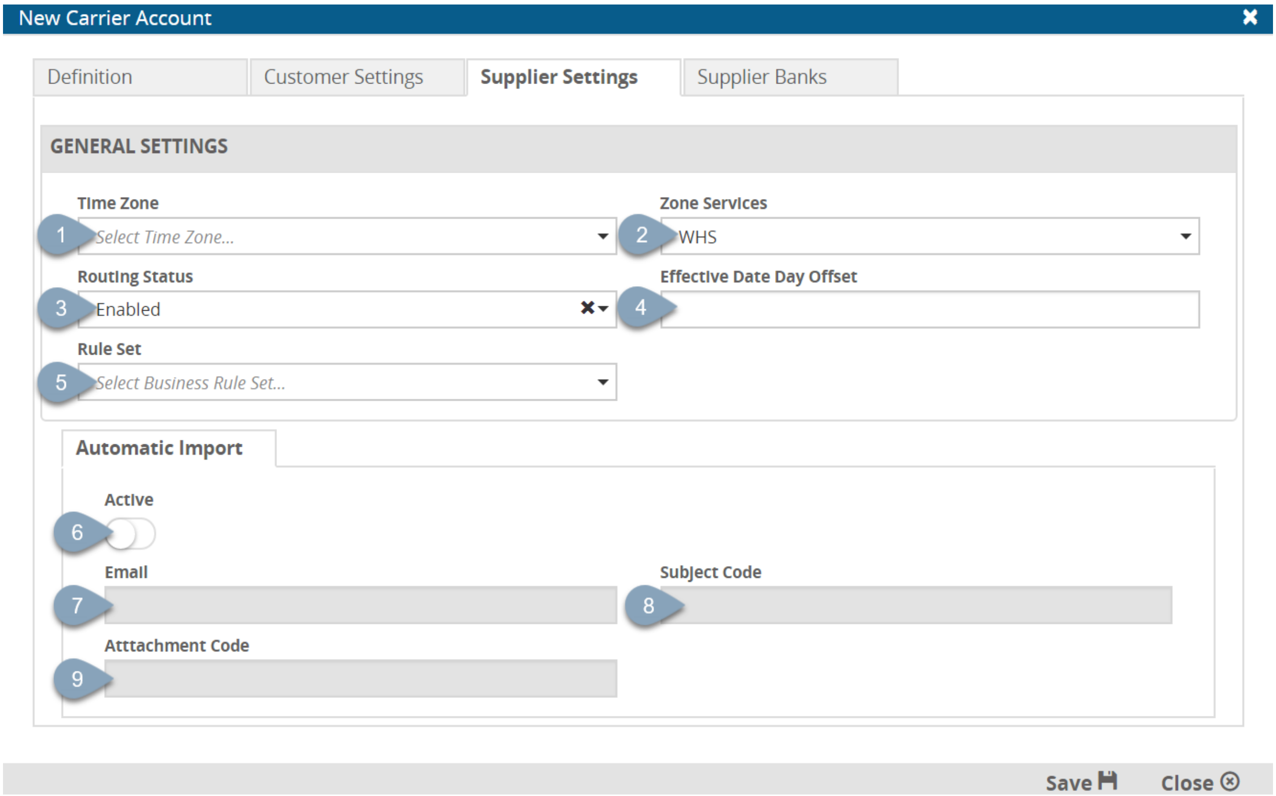


The table below describes each of the fields indicated by the markers, including required actions:

Customer Carrier Account-Pricing Settings - Day Offsets (If not specified, default settings will be applied from system configuration level) Refer to [Administration> System settings> Component Settings> Business Entities>Sale Area>Pricing Settings]()			
Rf	**Field**	**Description**	**Action**
1	**Sell Country**	Determines the minimum acceptable Notice Period for new Customer Country offer	Enter Notice Period for any new Country offer
2	**End Country**	Determines minimum acceptable Notice Period to close Customer Country offer	Enter Notice Period to close Country
3	**Increased Rate**	Determines minimum acceptable Notice Period to Increase a Customer rate offer	Enter Notice Period for Increased Rate
4	**Decreased Rate**	Determines minimum acceptable Notice Period to Decrease a Customer rate offer	Enter Notice Period for Decreased Rate

6. For Supplier and Exchange Carrier Account types, fill ***Supplier Settings*** tab details:

Carrier Account - Supplier Settings Tab- Screenshot



The table below describes each of the fields indicated by the markers, including required actions:

Supplier Settings-General Settings (If not specified, default settings will be applied from system configuration level)

Rf	Field	Description	Action
1	**Time Zone**	Determines Supplier Pricelist Time Zone to consider in the Supplier import process (Default setting is GMT System Time zone)	Select Supplier Pricelist Time Zone
2	**Zone Services**	Determines Supplier Zone Service. System Parent Service will be by default selected (refer to Administration>Lookups>Services)	Select Service from all available
3	**Routing Status**	Determines the Supplier Routing status: • Enable (default): outgoing calls are allowed • Disable: outgoing calls are blocked	Select between Enable or Disable
4	**Effective Date Day Offset**	Minimum acceptable notice period while Supplier Pricelist is imported and a rate increase or delete is detected. Example: if value equal 7, Effective Date less than 7 days into the future will trigger a warning. The rate could be rejected, or accepted by user importing supplier pricelist after analyzing the displayed warning. Refer to Administration>System Settings>Component Settings>Purchase Area	Specify Effective Date Offset
5	**Rule Set**	Assigned Business Rule to Supplier Pricelist. Refer to Business Rules where Business rules are already defined	Select Business rule
	Automatic Import (Default Supplier Import Templates are considered from Supplier Pricelist Import configuration)		
	Field	**Description**	**Action**
6	**Active**	This option allows system to automatically import Supplier Pricelists from emails without any manual user intervention	to Enable to Disable
7	**Email**	Sender Email address from which pricelist is received	Specify Sender match email
8	**Subject Code**	Match expression that must be contained in the pricelist email subject.	Define an expression for searching for specific mail keyword(s) subject
9	**Attachment Code**	Match expression that must be contained in the attached pricelist name	Define attachment match expression

7. For Supplier and Exchange Carrier Account types, fill ***Supplier Bank*** tab details where user can add Carrier Bank information used to pay Supplier Carrier Account invoices.
Supplier banks specified on carrier account level will override Supplier Banks specified on carrier profile level.

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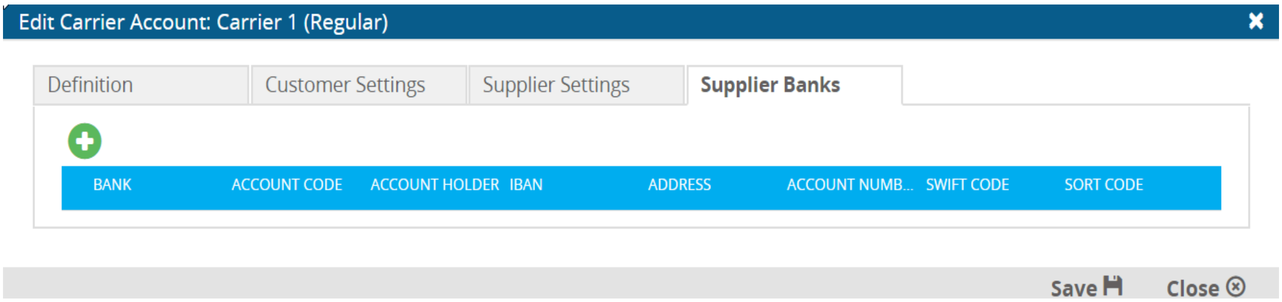
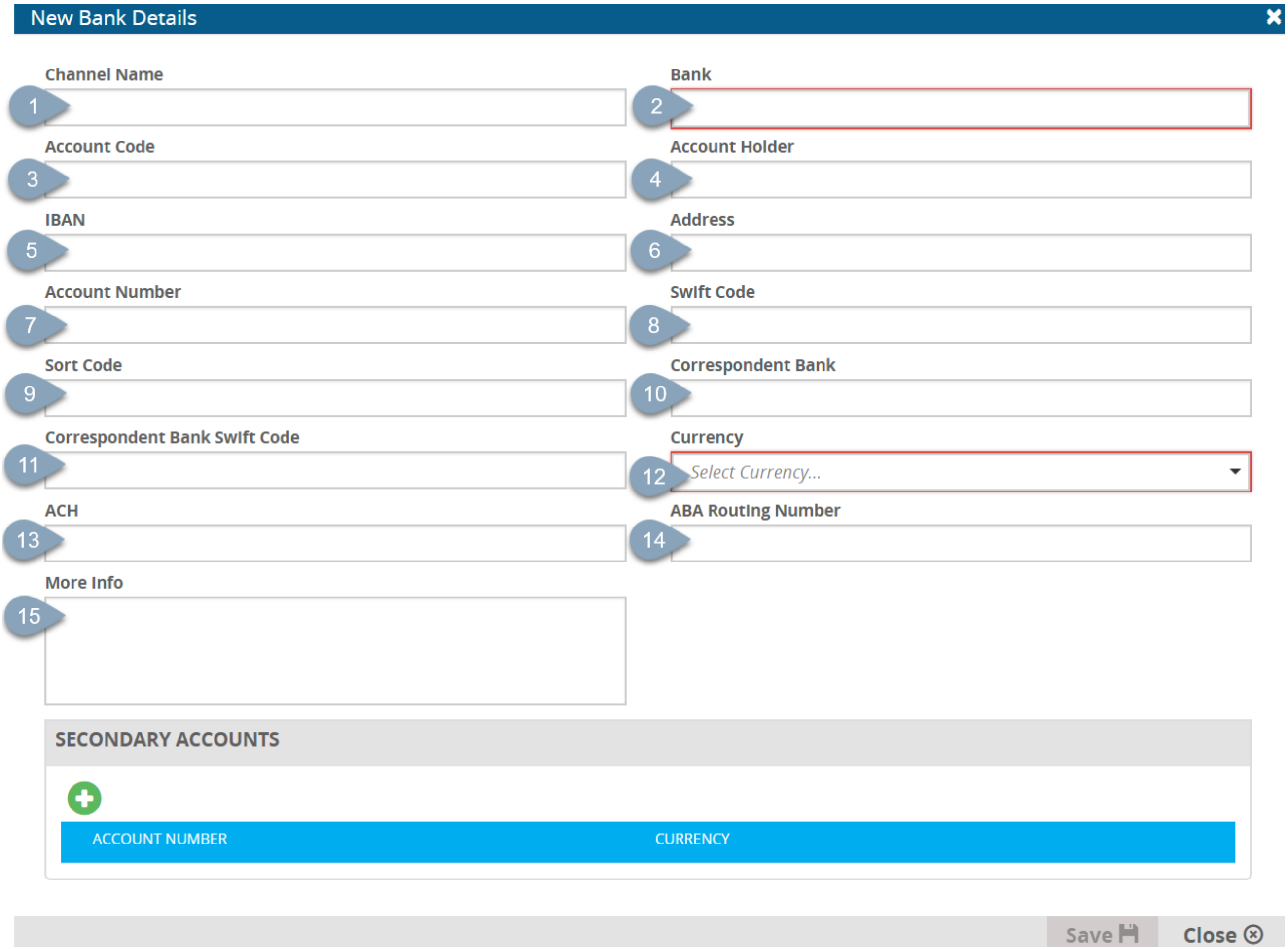
Supplier Banks tab- Carrier Account level- Screenshot



8. Click on the button to add one or multiple Supplier Bank details for corresponding carrier account. “**New Bank Details** “window will show up where user should fill corresponding Supplier bank details:

Supplier Bank Details-Screenshot



The table below describes each of the fields indicated by the markers, including required actions:

Rf	Field	Description	Action
1	**Channel Name**	Determines the Channel Name	Enter the required Channel Name

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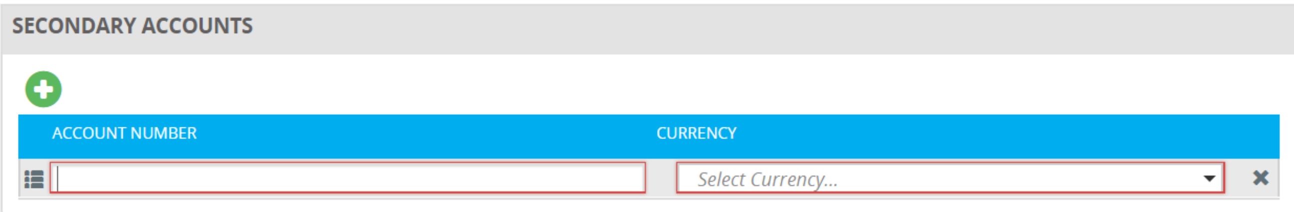
2	**Bank** (mandatory)	Determines the Bank Name	Enter Bank Name
3	**Account Code**	Determines the Bank Account Code	Enter the required Account Code
4	**Account Holder**	Determines the Account Holder	Enter Account Holder
5	**IBAN**	Determines the International Bank Account Number	Enter the required IBAN
6	**Address**	Determines the Bank Address	Enter Bank Address
7	**Account Number**	Determines the Bank Account Number	Enter the required Account Number
8	**Swift Code**	Determines the Swift Code	Enter Swift Code
9	**Sort Code**	Determines the Sort Code	Enter Sort Code
10	**Correspondent Bank**	Determines the Correspondent Bank	Enter Correspondent Bank
11	**Corresponding Bank Swift Code**	Determines the Bank Swift Code	Enter Bank Swift Code
12	**Currency** (mandatory)	Determines the Account Currency Refer to [Administration>Lookups>Currencies]()	Select the corresponding Currency. The user can instantly add a new Currency by clicking on the button.
13	**ACH**	Determines the ACH	Enter ACH
14	**ABA Routing Number**	Determines the ABA Routing Number	Enter ABA Routing Number
15	**More Info**	Determines additional details	Enter More Info

Click on the button to add one or multiple secondary account number(s) with corresponding currency for same Supplier defined bank



9. Click **Save** to finalize adding the carrier account that will be displayed under Carrier Account page and under corresponding Carrier Profile.

An alternative way to add and configure a Carrier Account can directly be done from **Business Partner > Carrier Account** component.

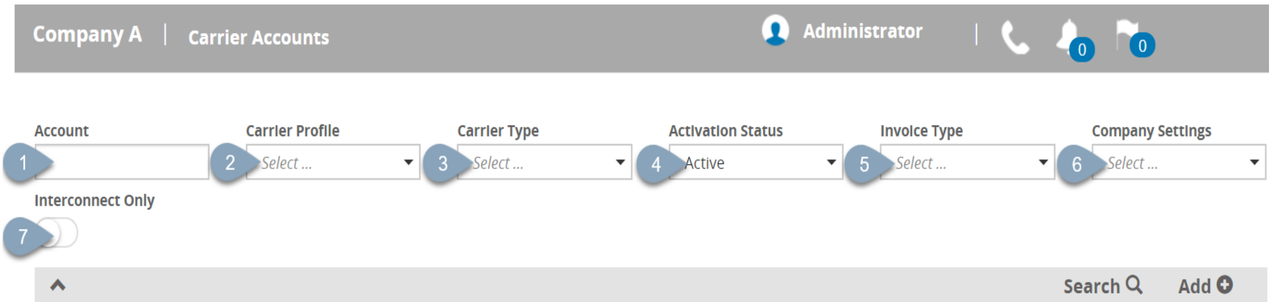
User has to click on the **Add** button located on the top right corner of the Carrier Account page. In this case, user has to select the Carrier Profile name under which the Carrier account is to be added, then to follow the same procedure described in this section.

View / Edit Carrier Account

All available Carrier Accounts can be viewed or edited from the Business Partner > Carrier Account component.

1. From Carrier Account page, user can search for specific Carrier Accounts using the below filters:

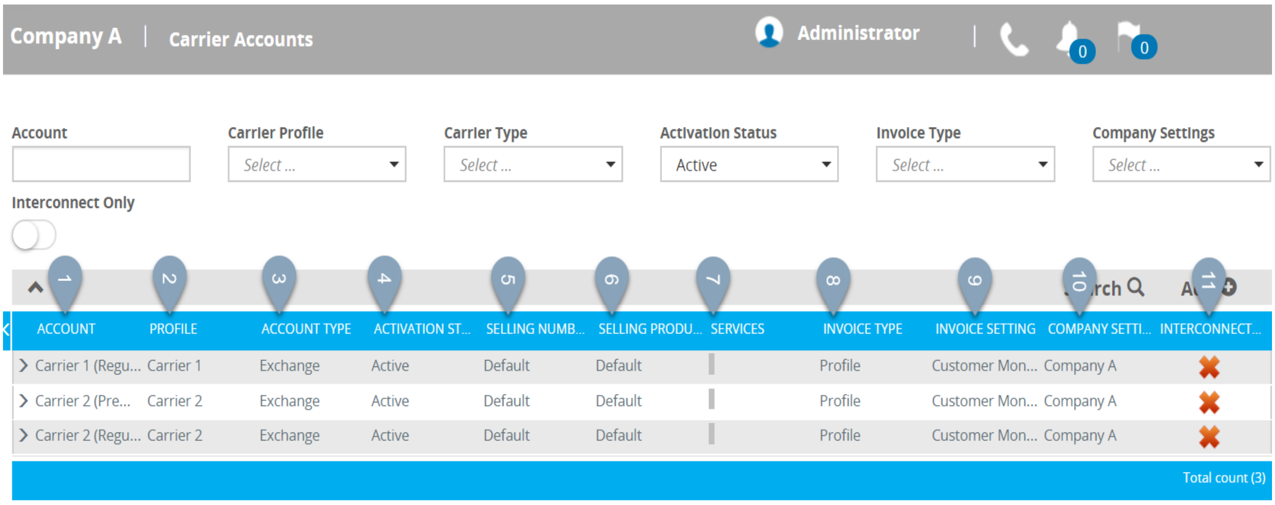
Carrier Account Search- Screenshot



Rf	Field	Description	Action
1	**Account**	Determines the Carrier Account name: Carrier Profile name+ (Suffix name)	Enter specific characters included in Carrier Account names
2	**Carrier Profile**	Determines name of the Carrier Profile to which the Carrier Account belongs	Select one or multiple Carrier Profile name(s) from all available
3	**Carrier Type**	Determines the Carrier type: • Customer: ingress only connection who will be sending traffic (to be rated and routed). • Supplier: egress only connection to which traffic will be routed (traffic will be routed to and charged based on supplier pricelist) • Exchange: connection to which calls are sent and from which calls are received	Select one or multiple Carrier type(s)
4	**Activation Status**	Determines the Carrier Account Activation status: • Active (default): Active Accounts • Inactive: Disabled Accounts • Testing: Testing Accounts (Reported in CDRs but not Billed)	Select Carrier Account with one or multiple activation status.
5	**Invoice Type**	Determines the Invoice Type: • Profile: Consolidated billing where a unique invoice will be generated including charges of all Carrier Accounts associated to this Carrier Profile. • Account: Standard billing where for each Carrier Account with valid Financial Account, an individual invoice will be generated.	Select one or multiple Invoice type(s)
6	**Company Settings**	Company branch name as presented to Carrier	Select Company Settings
7	**Interconnect Only**	If enabled, Carrier Account(s) with Interconnect traffic type will be filtered	to Enable to Disable (default)

2. To display filtered results, click on the Search button located at the right corner of the Carrier Accounts page.

Carrier Accounts view- Screenshot



Carrier Accounts filtered results are presented with the following columns:

Rf	Column Name	Description
1	**Account**	Determines the Carrier Account name
2	**Profile**	Name of the Carrier Profile to which the Carrier Account belongs
3	**Account Type**	Determines the type of Carrier: • Customer: ingress only connection who will be sending traffic (to be rated and routed). • Supplier: egress only connection to which traffic will be routed (traffic will be routed to and charged based on supplier pricelist) • Exchange: connection to which calls are sent and from which calls are received
4	**Activation Status**	Determines the Carrier Account Activation status: • Active (default): Active Accounts • Inactive: Disabled Accounts • Testing: Testing Accounts (Reported in CDRs but not Billed)
5	**Selling Number Plan**	Determines Customer Selling Number Plan (Refer to Numbering Plan section)
6	**Selling Product**	Determines Customer Selling Product (Refer to Selling Product section)
7	**Services**	Determines Supplier Zone Service from all available (already created under Administration>Lookups>Services)
8	**Invoice Type**	Determines the Invoice Type: • Profile: Consolidated billing where a unique invoice will be generated including charges of all Carrier Accounts associated to this Carrier Profile) • Account: Standard billing where for each Carrier Account with valid Financial Account, an individual invoice will be generated
9	**Invoice Setting**	Determines assigned Customer Invoice setting configured under related Financial account
10	**Company Setting**	Company branch name presented to Carrier
11	**Interconnect switch**	Determines if Carrier account is an Interconnect Switch: ✔ : Carrier Account traffic will be considered as transit traffic. Related CDRs leg are not priced and not billed.

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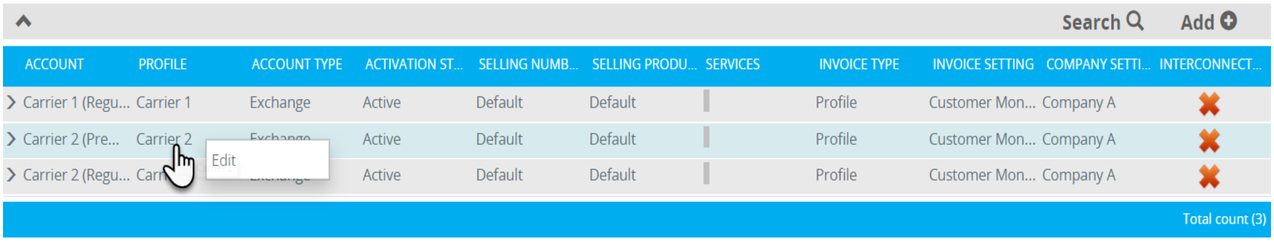
		✖ : Carrier Account is not an Interconnect Switch

From the upper left corner of the Carrier Accounts grid, user can export the filtered Carrier Accounts result by clicking on < then on 

3. User can edit or update any filtered Carrier Account by selecting one record, then by clicking on the **Edit** action

Edit a Carrier Account- Screenshot



ACCOUNT	PROFILE	ACCOUNT TYPE	ACTIVATION ST...	SELLING NUMB...	SELLING PRODU...	SERVICES	INVOICE TYPE	INVOICE SETTING	COMPANY SETTI...	INTERCONNECT...
Carrier 1 (Regu...	Carrier 1	Exchange	Active	Default	Default		Profile	Customer Mon...	Company A	✖
Carrier 2 (Pre...	Carrier 2	Exchange	Active	Default	Default		Profile	Customer Mon...	Company A	✖
Carrier 2 (Regu...	Carr...	Exchange	Active	Default	Default		Profile	Customer Mon...	Company A	✖

Account Manager

The Account Manager is a member of the Wholesale BSS users who works with, or manages a number of
Carriers.

Wholesale BSS provides the option to associate the Account Managers to the Carrier Accounts for which they are responsible.

In this case, Traffic Summary reports, and account billing information will be correlated to the Account Manager in charge triggering them by email when any Financial or Traffic Alerts are met.

Add Account Manager

To add a new Account Manager, follow the below steps:

1. Navigate to Business Partners>Account Manager

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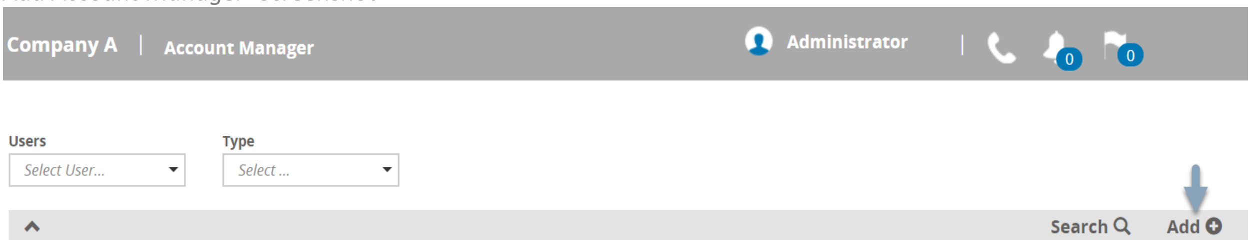
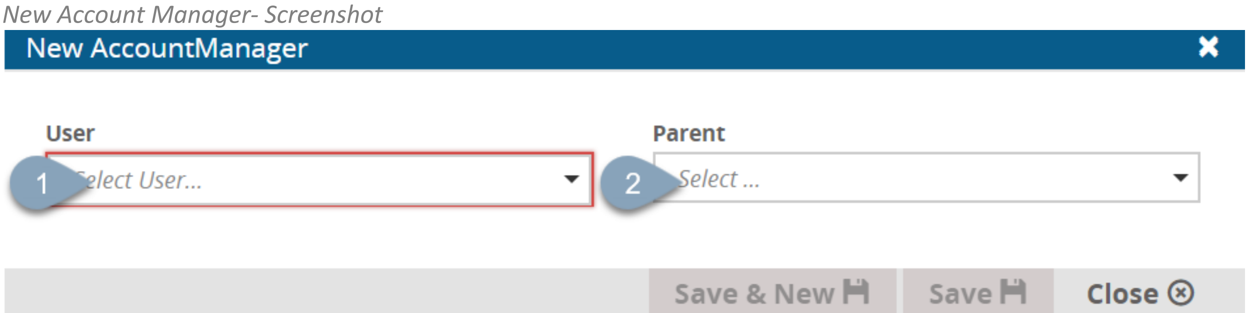
2. Click on the Add button to add a new Account Manager

Add Account Manager- Screenshot



3. "**New Account Manager** "window will show up. Configure the corresponding fields as described in the below table

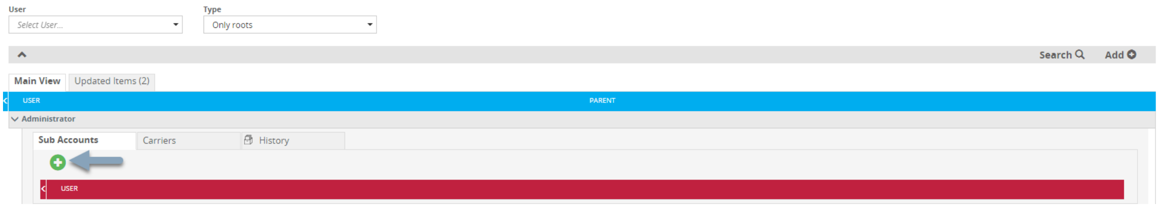
New Account Manager- Screenshot



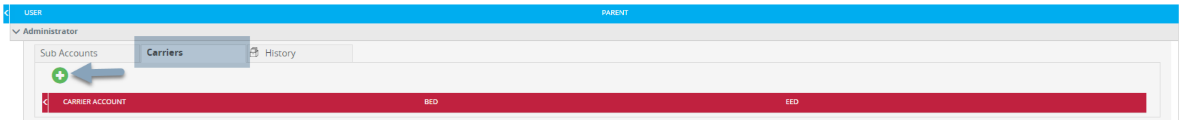
Rf	Field	Description	Action
1	**User** (mandatory)	Allows to specify the User needed to be defined as Account Manager	Select User Name of the Account Manager
2	**Parent**	Determines all Users defined as Account Managers allowing to specify if the defined Account Manager has a parent Account Manager	Select the Parent of the corresponding Account Manager

4. Click on Save button to finalize adding a new Account Manager or click on Save & New to save the operation and start a new procedure of adding a New Account Manager.

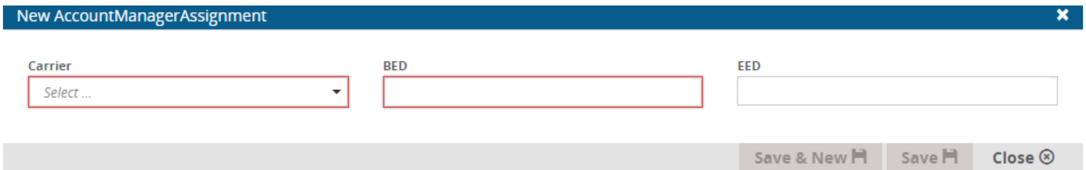
   An alternative way to add a Sub - Account Manager is by drilling down any existing Account manager and by clicking on the button of *Sub Accounts* tab:



5. To associate an Account Manager to the Carrier Accounts for which he is responsible, click on the button of *Carriers* tab:



6. New Account Manager Assignment window will open where user can individually select one Carrier account that will be associated to the Account manager starting from the BED set date. EED can be set in case, user wants to end the assignment on a specific date (EED is not mandatory)

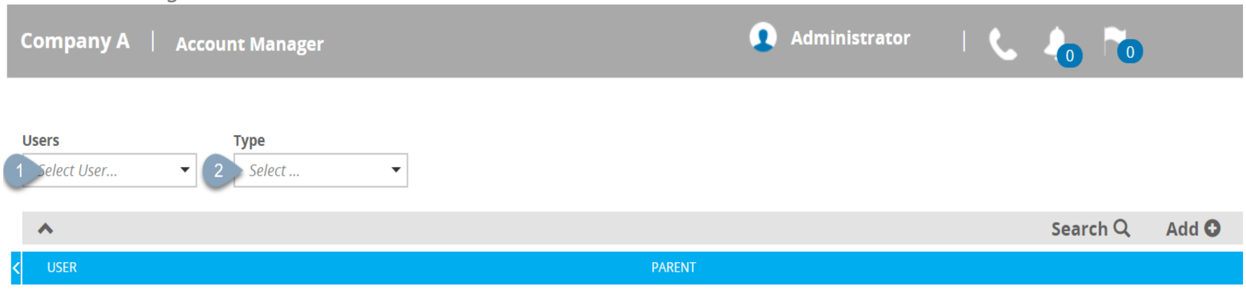


View/ Edit Account Manager

1. User can search for a specific Account Manager according to the User Name of the Account Manager and Account Manager Type.

   For such action, select the User name and Type as described below:

Account Manager Filters- Screenshot



Rf	Field	Description	Action
1	Users	Allows the logged in to specify the User needed to be defined as Account Manager	Select User Name of the Account Manager
2	Type	Determines the Account Manager Type: • All Account Managers: allowing the user to search for all defined account managers. • Only Roots: allowing the user to search only for the account managers representing roots for other accounts. • Sub Accounts: allowing the user to search only for the account managers representing sub accounts for other roots	Select the corresponding Account Manager Type

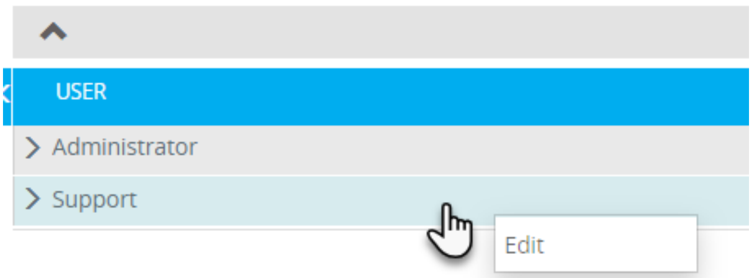
2. After clicking on the **Search** button, Account Manager filtered result will be displayed.

Account Manager Search Result- Screenshot

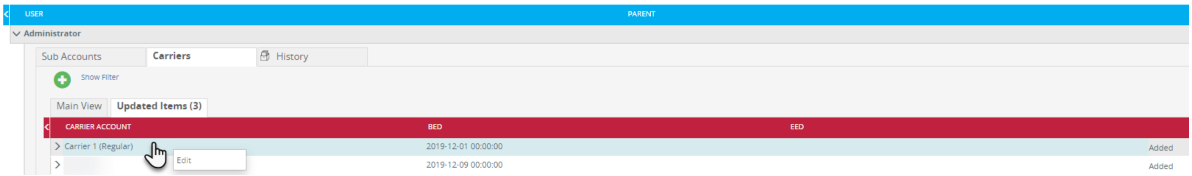
3. It is also possible to export the Account Manager results by simply clicking on the  icon, then on **Export**.

4. User can view or edit the Carrier accounts assigned to any filtered Account Manager by clicking on the **Edit** action of any selected Account manager name.

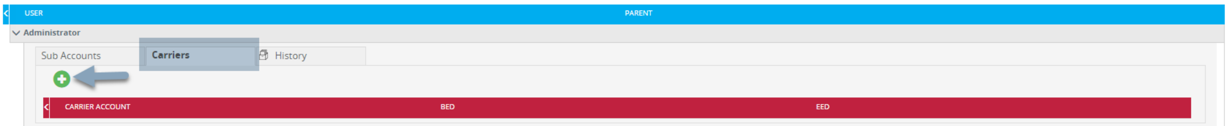
Edit Account Manager- Screenshot



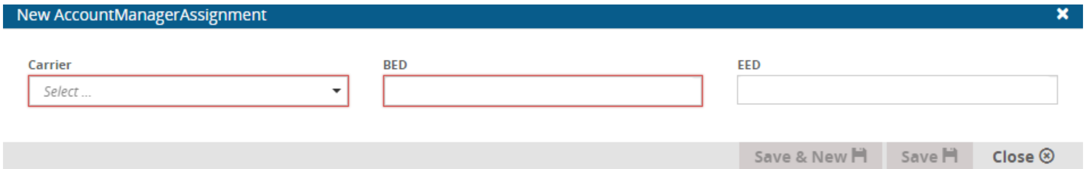
5. To view or edit the Carrier Accounts for which the selected Account manager is responsible, click on the **Edit** action of any Carrier account listed in *Carriers* tab:



6. From here, user can still associate new Carrier Accounts to the selected Account manager by clicking on the button of its *Carriers* tab:



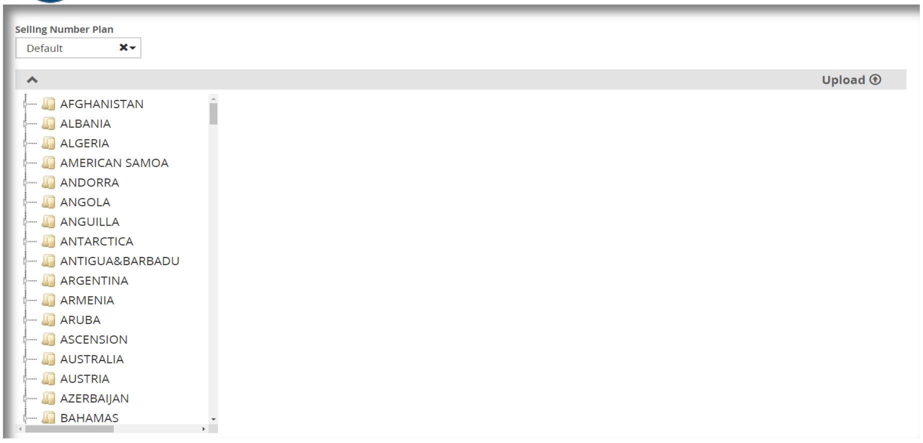
7. New Account Manager Assignment window will open where user can individually select one Carrier account that will be associated to the Account manager starting from the BED set date. EED can be set in case, user wants to end the assignment on a specific date (EED is not mandatory)



Zones and Codes Manual Management

For the case when there are few destinations being changed, it is easy to enter the individual codes manually.

After selecting a specific Numbering Plan, all countries added in the system will be displayed and assigned to it. From here, user would be able to add or modify zones/codes for each country:

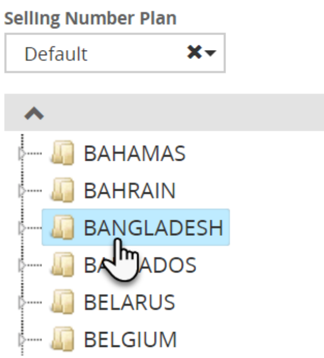


For the chosen Selling Numbering Plan, any country name expansion shows all defined (effective or pending effective) zones in this country.

Add new Zones

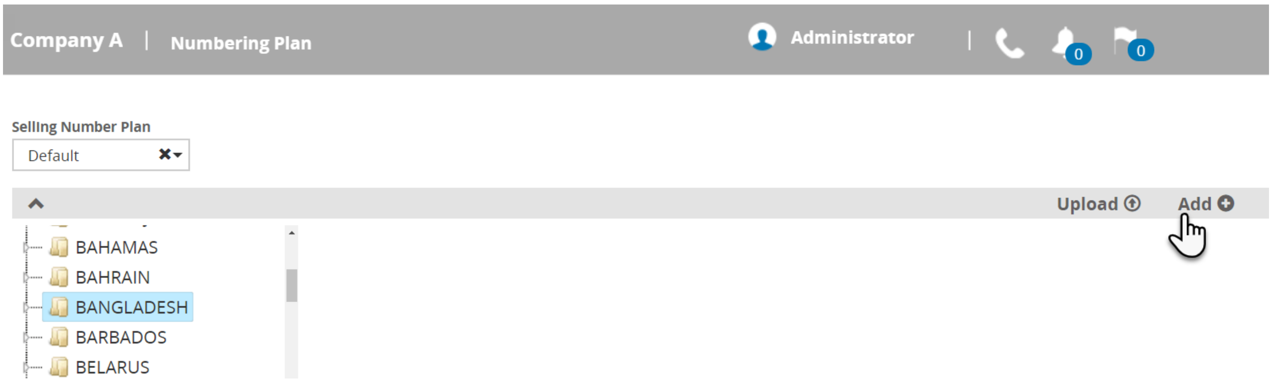
To add a new zone, follow below steps:

1. Click on the Country for which you want to add a zone:



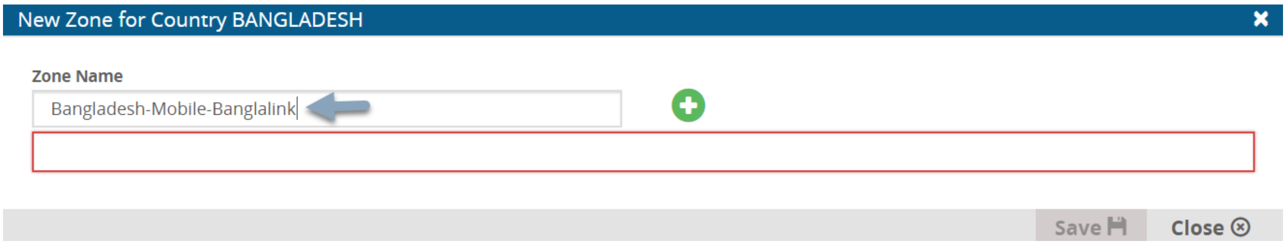
2. Press on the Add button, located at the top right corner of the Numbering Plan page.

Add a New Zone-Screenshot



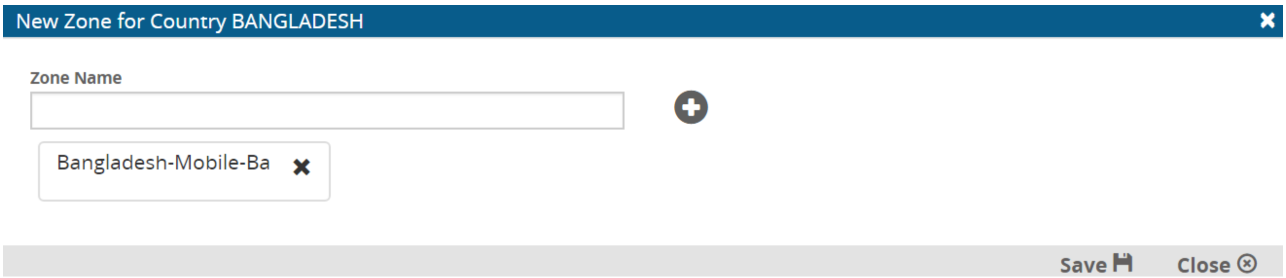
3. "**New Zone for Country**" window will appear where you should enter the new Zone Name (Zone name should not be an existing one)

New Zone Name Entry- Screenshot



4. Press on the button to add the zone name.

Added Zone name display- Screenshot



The added zone name will be displayed in the text field, can be saved in draft after clicking on the Save button or can be cancelled after clicking on the Close button.

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5. After saving the new added Zone name in draft, it will be listed under its relevant Country and will be marked with a ⊕ symbol:

Numbering Plan- new Zone name- Screenshot

At this stage, user can still decide to cancel the changes saved in draft by pressing on the **Cancel Changes** ⊗ button.

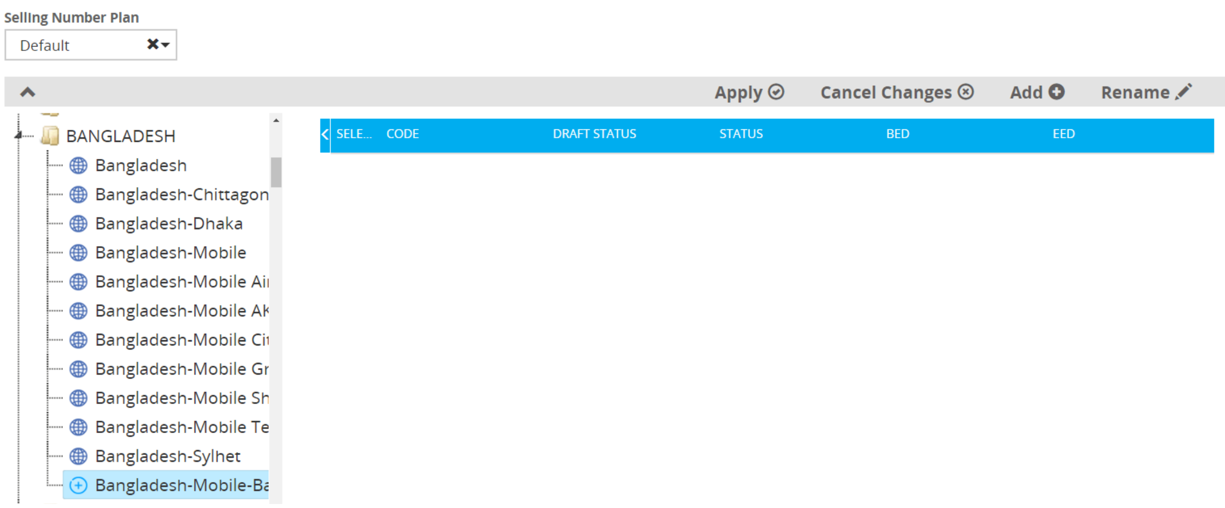
The zone cannot be applied to the system without adding at least one code to it. Procedure to [add new codes] to a zone name is described next.

Add new Codes

To add a new code to an existing zone name, follow below steps:

1. Select the zone name under which code will be added

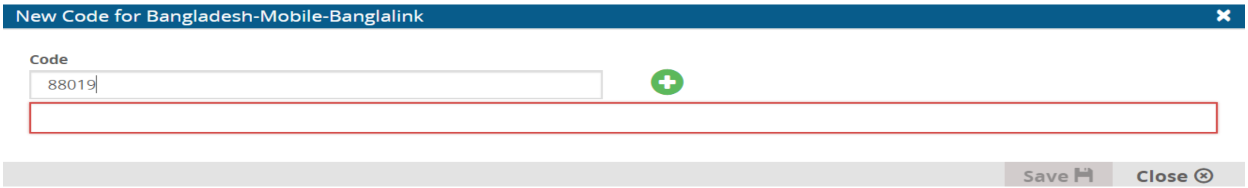
Select Zone name where to add new code- Screenshot



2. On the top-right corner of the Numbering Plan page, press on the Add button

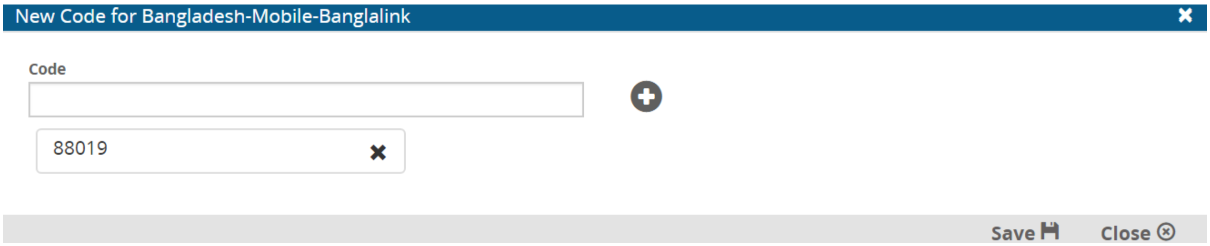
3. “**New Code for ‘Zone name’** window will appear where you should enter the new code digits (The entered Code number should not be an existing code under the selected Numbering Plan)

New Code for Zone name- Screenshot



4. Press on the button to add one or multiple new codes

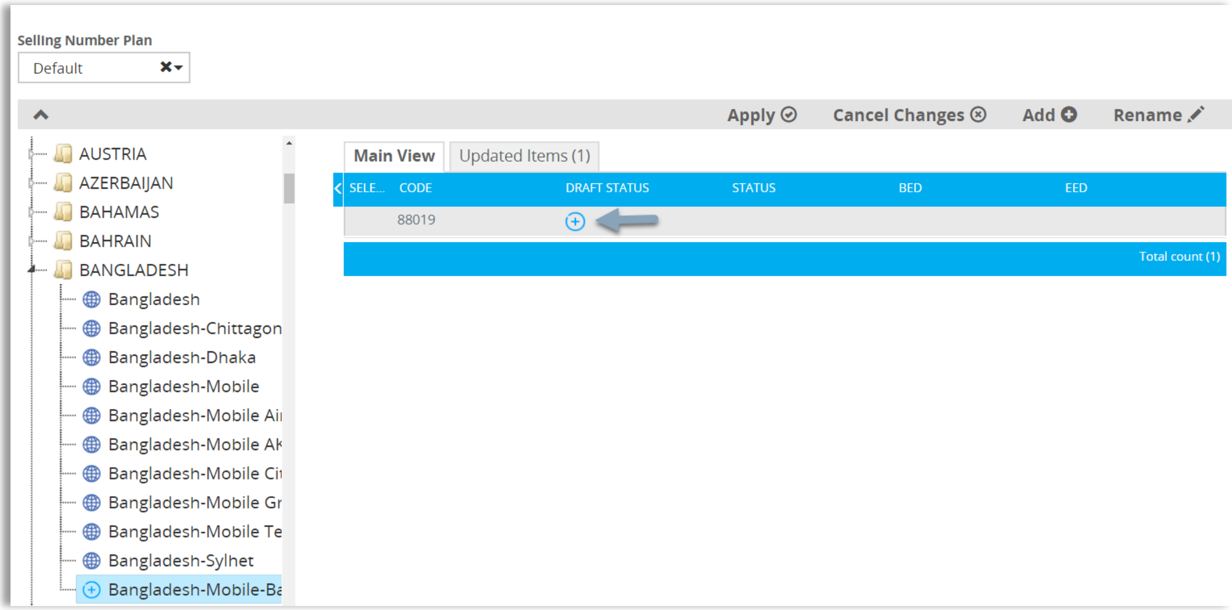
Added New Code display - Screenshot



The added Code(s) will be displayed in the text field, can be saved in draft after clicking on the Save button or can be cancelled after clicking on the Close button.

5. After saving the new added code in Draft, it will be listed under its relevant Country and will be marked with a symbol

Numbering Plan- New Code - Screenshot

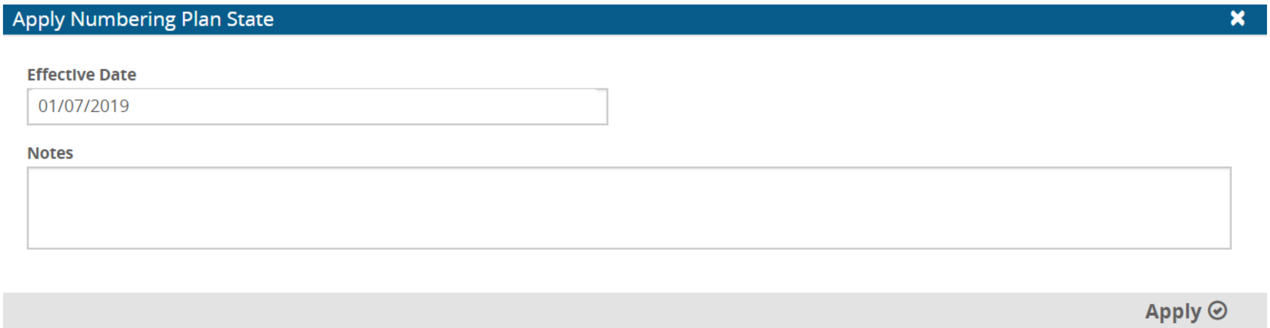


6. At this stage, user can decide to:

   - Cancel the changes that are saved in draft by pressing on the Cancel Changes button
   - Proceed with the changes by pressing on the Apply button

7. If Apply button has been pressed, a popup window will appear where **Effective Date** to apply changes on should be determined (cannot be before today) and associated Notes can be added:

Numbering Plan Changes-Effective Date-Screenshot



By default, the effective date will be today + Numbering Plan day offset specified in [Administration >Component Settings]

8. To apply the new changes to system database, press on the Apply button.

Subsequent actions are described in [Run Numbering Plan Business Process] , leading Customer to verify generated Customer Sale Pricelists affected by the change and sending them to Customers.

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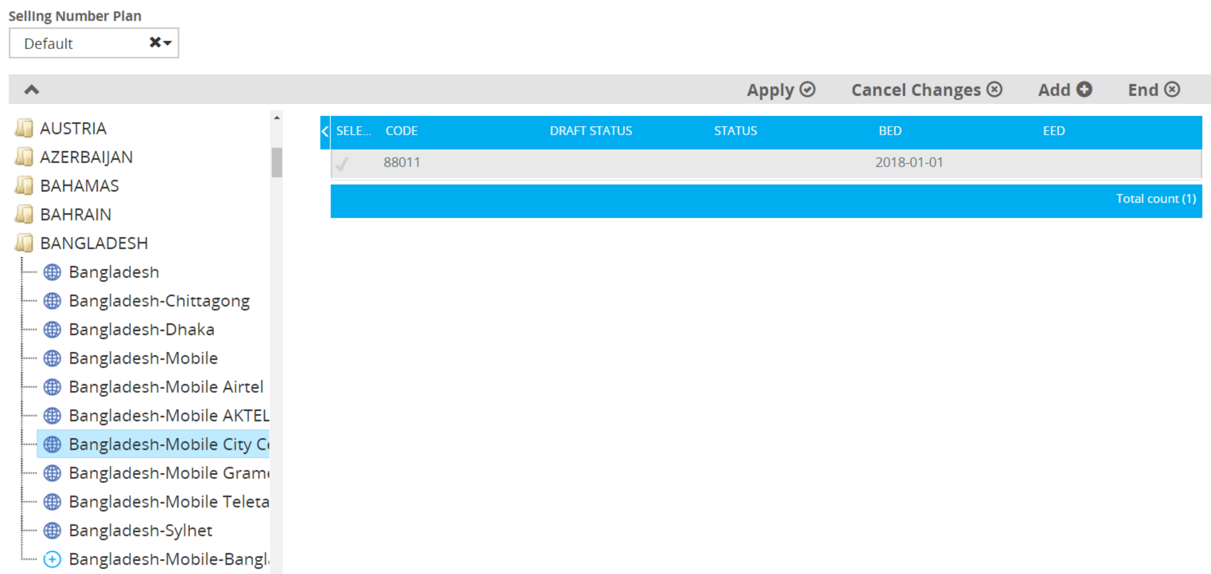
End a Zone Name

To end an existing zone name, follow below steps:

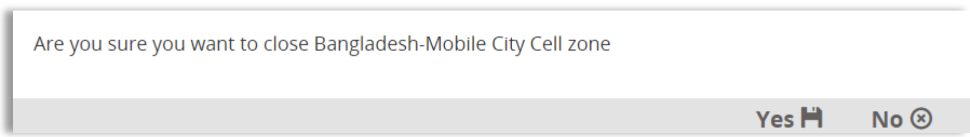
1. Select the zone name to be deleted

Select Zone name to delete - Screenshot



2. On the top-right corner of the Numbering Plan page, press on the End button (Ending a zone name will end in turn all the codes under this zone)

3. A pop up appears asking for confirmation regarding closing the zone



If **No** is selected, ending the Zone name will be cancelled.

4. By clicking on **Yes**, the closed Zone with its corresponding Code(s) will be deleted in Draft and will be marked with the symbol.

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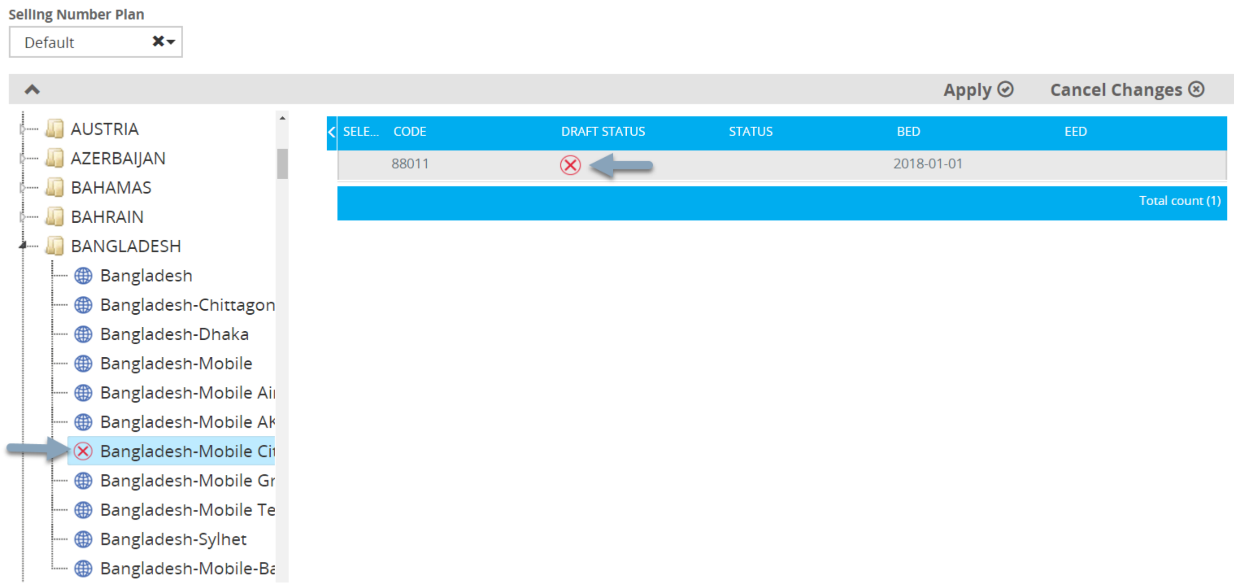
Numbering Plan-deleted Zone name- Screenshot

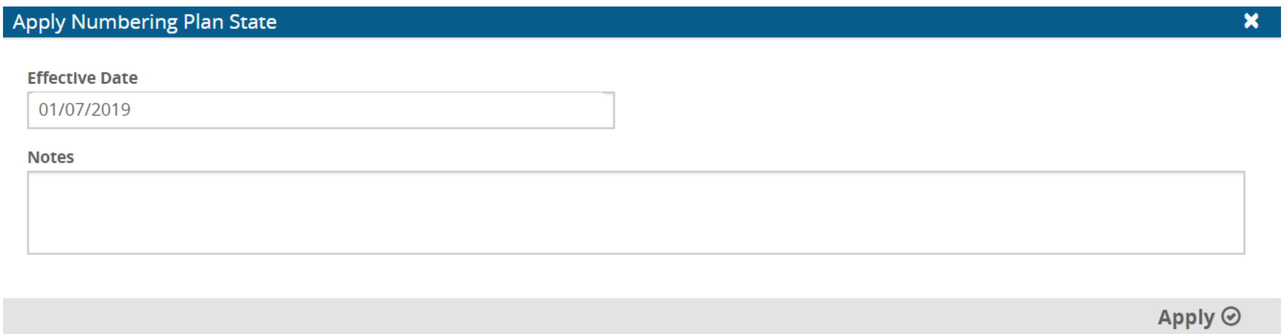


5. At this stage, user can decide to:

- Cancel the changes that are saved in draft by pressing on the Cancel Changes button
- Proceed with the changes by pressing on the Apply button

6. If Apply button has been pressed, a popup window will appear where **Effective Date** to apply changes on should be determined (cannot be before today) and associated Notes can be added:

Numbering Plan Changes-Effective Date-Screenshot



By default, the effective date will be today + Numbering Plan day offset specified in [Administration >Component Settings>Sale Area>Pricing Settings](#).

7. To apply the new changes to system database, press on the Apply button.

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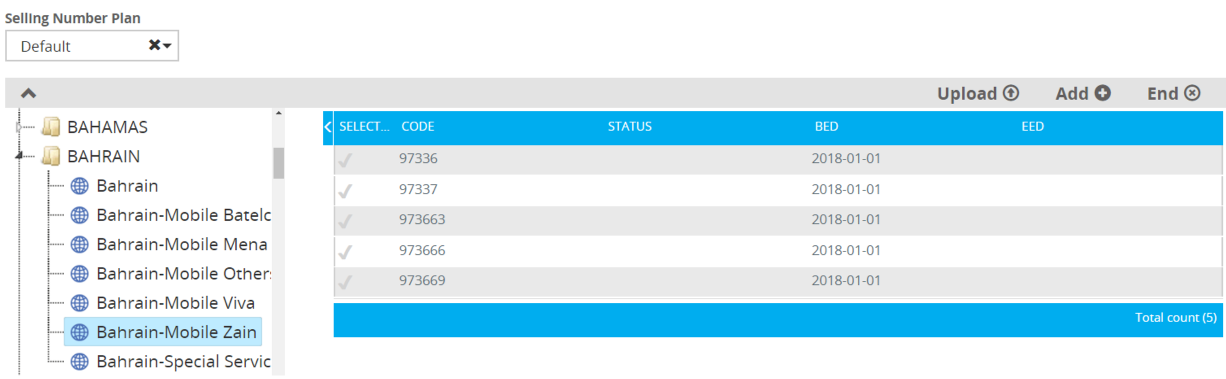
Subsequent actions are described in [Run Numbering Plan Business Process](), leading Customer to verify generated Customer Sale Pricelists affected by the change and sending them to Customers.

End a Code

To delete a code from an existing zone name, follow below steps:

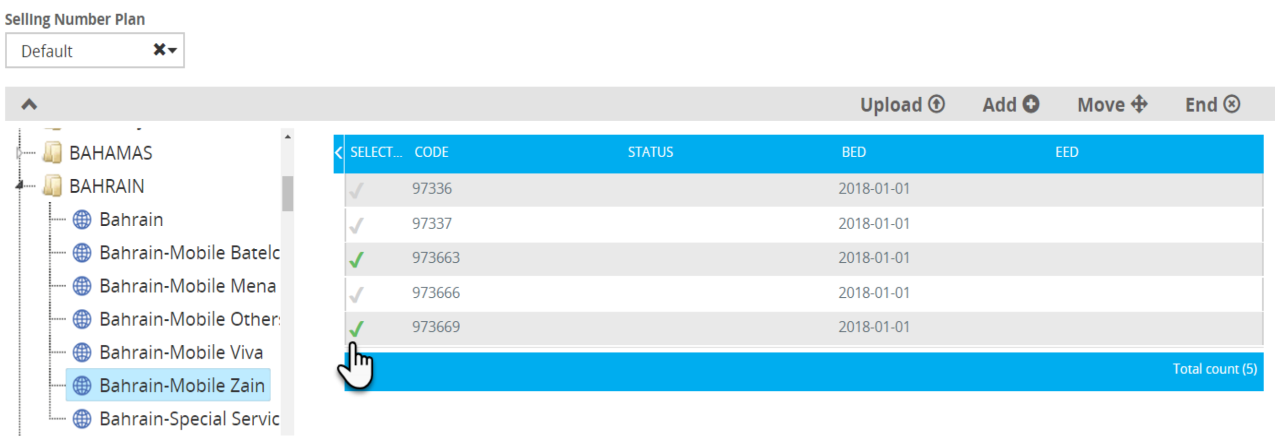
1. Select the zone name under which code will be deleted

Select Zone name - Screenshot



2. Tick one or multiple codes that you want to end. If the code is the unique code belonging to the zone, then ending it will end the zone in turn.

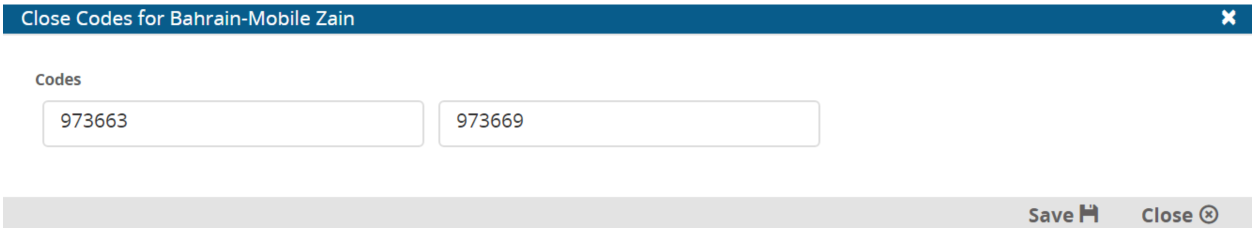
Select the Code(s) to delete - Screenshot



3. On the top-right corner of Numbering Plan page, press on the End ⊗ button.

4. Closing Codes window will appear. The Code(s) to be closed will be displayed in the text field.

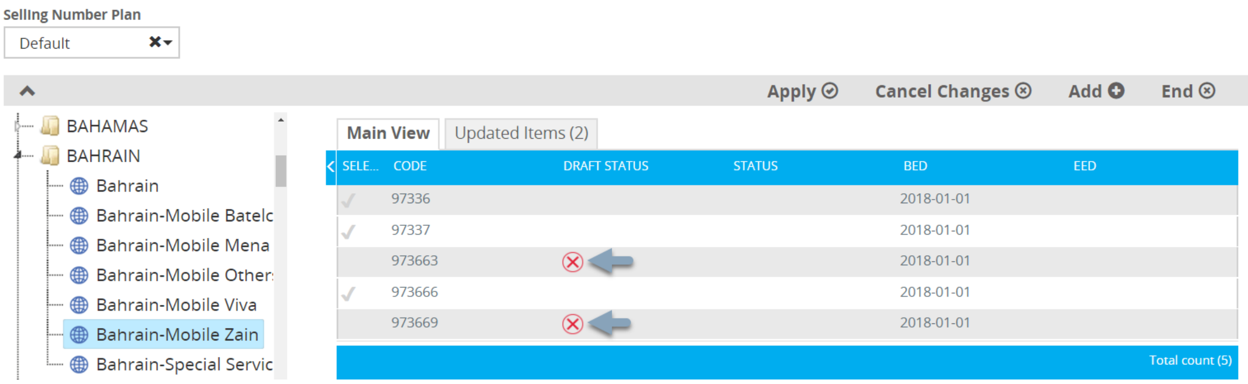
Close Codes for a Zone name- Screenshot



Press on **Save** to end the code and save the deletion in Draft or press on **Close** to cancel ending the zone.

5. After saving the closed Code(s) in draft, it will be listed under its relevant Country and will be marked with a ⊗ symbol

Numbering Plan-deleted Code(s) - Screenshot

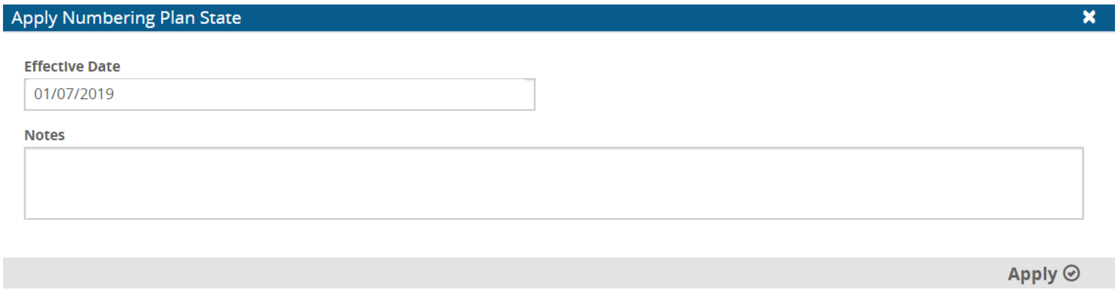


6. At this stage, user can decide to:

- Cancel the changes that are saved in draft by pressing on the **Cancel Changes** button
- Proceed with the changes by pressing on the **Apply** button

7. If **Apply** button has been pressed, a popup window will appear where **Effective Date** to apply changes on should be determined (cannot be before today) and associated Notes can be added:

Numbering Plan Changes-Effective Date-Screenshot



By default, the effective date will be today + Numbering Plan day offset specified in [Administration >Component Settings>Sale Area>Pricing Settings](#).

8. To apply the new changes to system database, press on the Apply button.

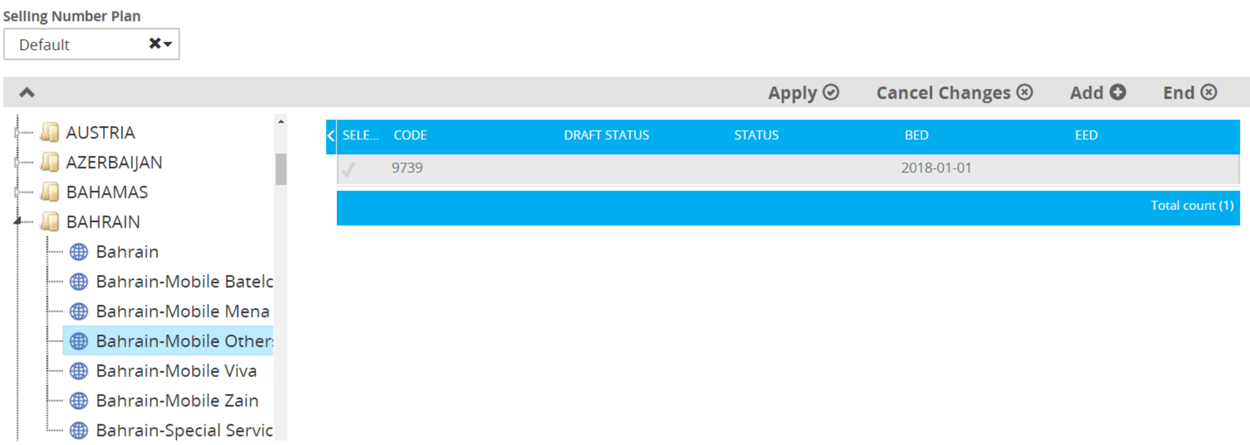
Subsequent actions are described in [Run Numbering Plan Business Process](#) , leading Customer to verify generated Customer Sale Pricelists affected by the change and sending them to Customers.

Move a Code

To Move a code, follow below steps:

1. Click on the zone whose code is to be moved to another zone

Select Zone name to move code from- Screenshot



2. Select the Code to move

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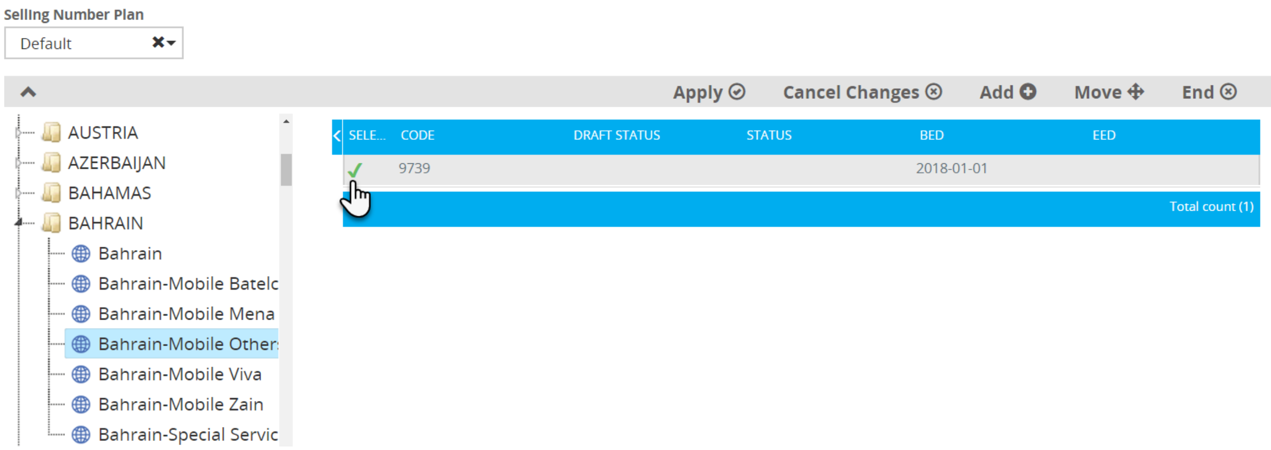
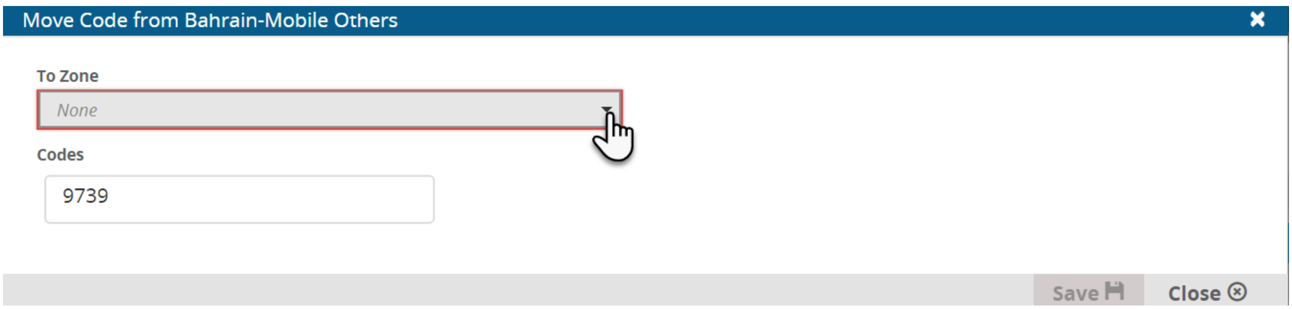
Select the Code to move- Screenshot



3. Press the **Move** button located at the top right corner of the Numbering Plan page. “**Move Code from ‘Zone name’** ”window will appear to choose the zone where the code will be moved to.

Select the move To Zone- Screenshot



All zones belonging to the same country of the moved code will be displayed in the list.

4. Choose the “To Zone” name and press **Save** to save changes in Draft or **Close** to cancel moving the code(s).

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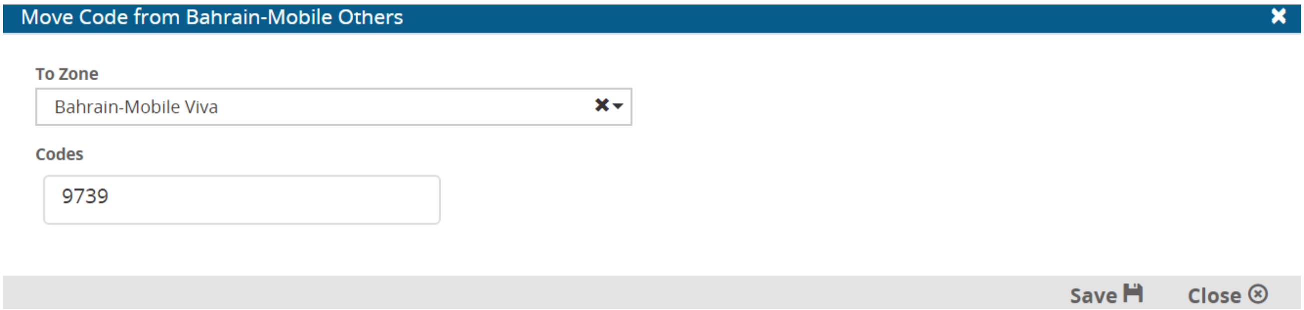
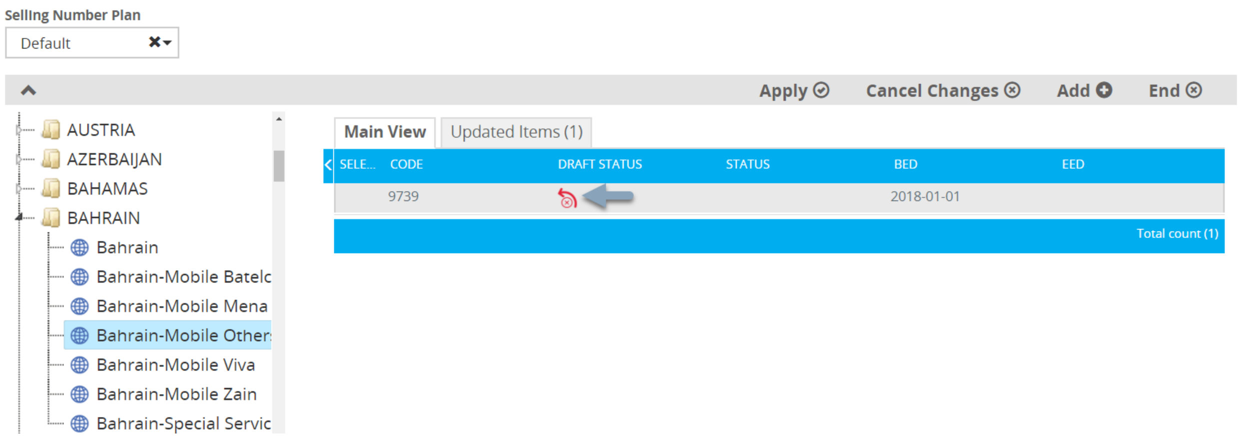
Moved Code to Zone display- Screenshot



5. For Saved in draft changes, Moved Code (s) will appear under its Moved From Zone as Moved to another zone. and will be marked with the symbol.

Numbering Plan- Code Moved From a Zone - Screenshot



The moved Code (s) will appear in the Moved To zone as moved from another zone and will be marked with the symbol.

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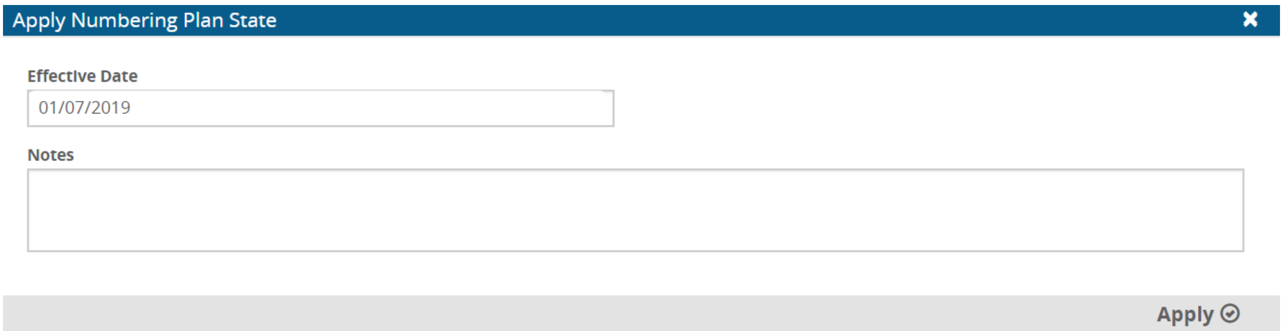
Numbering Plan- Code Moved To a Zone - Screenshot

6. At this stage, user can decide to:
   - Cancel the changes that are saved in draft by pressing on the **Cancel Changes** button
   - Proceed with the changes by pressing on the **Apply** button

7. If **Apply** button has been pressed, a popup window will appear where **Effective Date** to apply changes on should be determined (cannot be before today) and associated Notes can be added:

Numbering Plan Changes-Effective Date-Screenshot



By default, the effective date will be today + Numbering Plan day offset specified in Administration >Component Settings>Sale Area>Pricing Settings.

8. To apply the new changes to system database, press on the **Apply** button.

Subsequent actions are described in Run Numbering Plan Business Process , leading Customer to verify generated Customer Sale Pricelists affected by the change and sending them to Customers.

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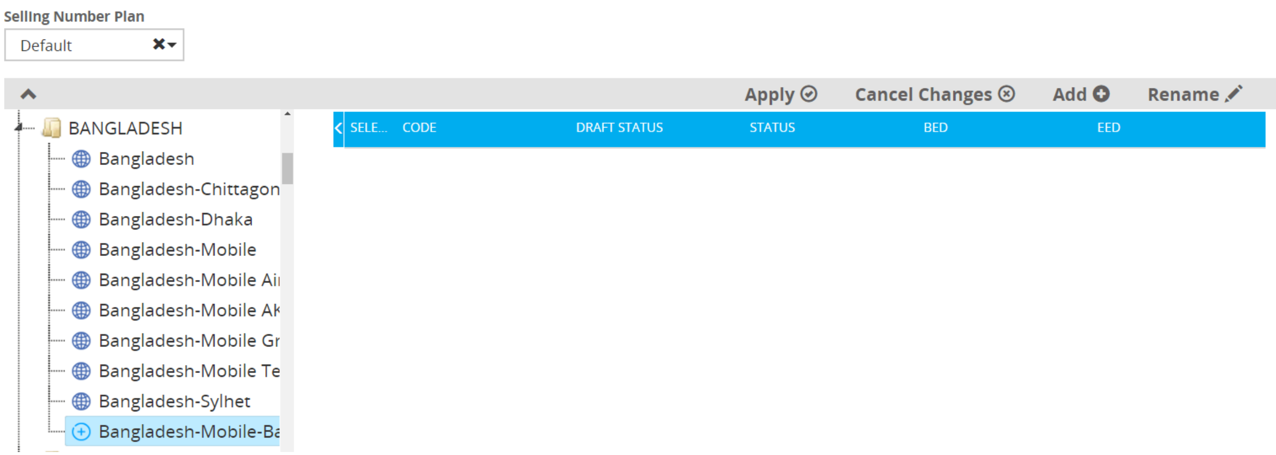
Rename a Zone

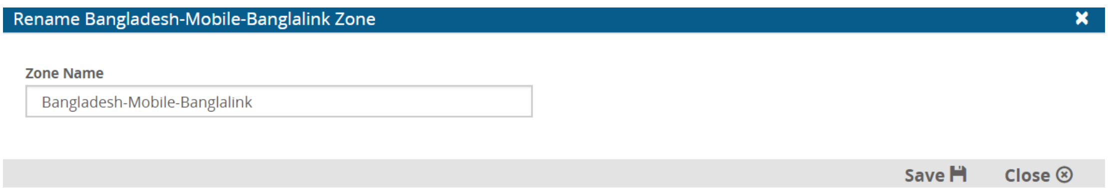
1. Click on the zone to be renamed. Only zones with added codes saved in draft mode can be renamed from user interface.

Select Zone name to rename- Screenshot



2. Press the Rename button where a pop-up window appears

Rename a Zone window- Screenshot



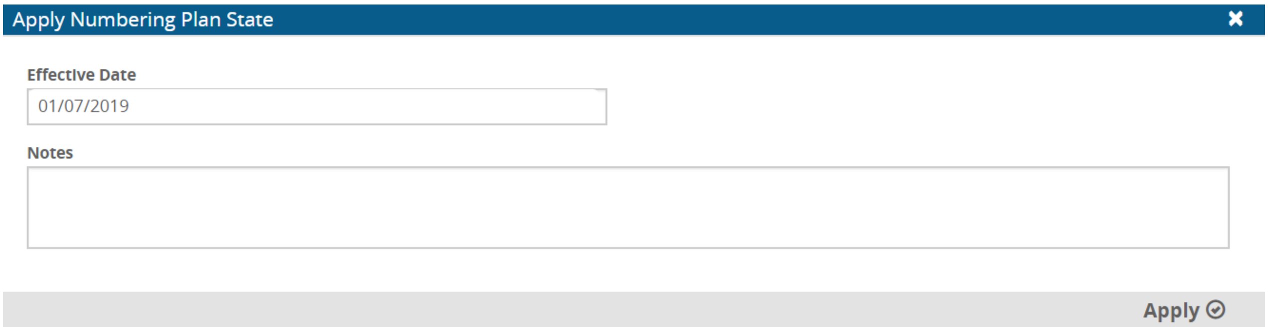
3. Enter the new name, by default the same zone name will be shown.

4. Press Save to save the new name or Close to cancel the renaming.

5. At this stage, user can decide to :
   - Cancel the changes that are saved in draft by pressing on the Cancel Changes button
   - Proceed with the changes by pressing on the Apply button

6. If Apply button has been pressed, a popup window will appear where **Effective Date** to apply changes on should be determined (cannot be before today) and associated Notes can be added:

Numbering Plan Changes-Effective Date-Screenshot



By default, the effective date will be today + Numbering Plan day offset specified in Administration >Component Settings>Sale Area>Pricing Settings

7. To apply the new changes to system database, press on the Apply button.

Subsequent actions are described in Run Numbering Plan Business Process , leading Customer to verify generated Customer Sale Pricelists affected by the change and sending them to Customers.

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