Billing App

Yeastar K2 IPPBX

Version: 2.0.9
Date: 2024-08-01

Contents

Billing

Yeastar K2 IPPBX Billing App provides a powerful and flexible billing solution that enables the enterprises to grow and prosper in this challenging environment by managing their business efficiently.

Use the Billing App to allocate call credit and top up extensions/accounts, and conduct call analysis. Both prepaid and postpaid payments are supported. Rate can be set according to extensions, time periods, call duration, prefix number and number length. Real-time top-up history and statistics are all recorded.

> ✏️ **Note:**
> If you uninstall the Billing App, all of your billing data will be erased.

Features of Billing App

- **Call Credit Management**

  Users could choose to charge the call cost from the extension level or the account level.

  ○ Extension level: call credits are assigned to specific extensions.
  ○ Account level: call credits are assigned to pre-configured accounts and shared by users who know the password (PIN code).
- **Real-time Billing**

  The immediate real-time billing empowers the user by making rating, charging and balance and account management responsive, interactive and flexible.

- **Prepaid and Postpaid Service**

  Prepaid and postpaid modes provide real-time billing.

- **Flexible Rating**

  Rate can be set according to extensions/accounts, time periods, call duration, call types (whether local or international, from landline or mobile phone).

- **Detailed Statistics**

  Provides call detail reports (display usage by time frames, extension/account, and trunks) for management and traffic analysis.

Billing General Settings

Before you start to use the Billing App, you need to enable the Billing App and configure the general settings.

Enable Billing App

1. Log in the PBX web interface, go to **Billing > General Settings**, check the option **Enable Billing**.

2. Click **Save**.

Billing General Settings

Go to **Billing > General Settings**, configure the general settings of the Billing App.

- **Currency**: Select the billing currency, or you can enter a currency in the text box directly.
- **Rounding Scale**: Set the number of significant digits to the right of the decimal point.

   For example, a scale of 2 applied to 11.3633 rounds to 11.36.
- **Insufficient Balance Prompt**: When the extension/account doesn't have sufficient balance to dial out, the system will play the prompt.
- **Extensions Locked Prompt**: When the extension/account is locked, the system will play the prompt.
- **Top-up Prompt**: If the extension/account reaches the **Balance Threshold**, the system will play the top up prompt when you are calling out.
- **Balance Threshold**: When the balance of the extension/account reaches the threshold, the system will play the **Top up Prompt** to remind you to top up your extension/account.
- **Hangup with Insufficient Balance**: When the account balance is less than the credit limit, the call will be hung up automatically.

Billing Settings of Extensions

Configure the billing settings for the extensions.

Go to **Billing > Extension** to configure the billing settings for the extensions.

At the top of the page, you can see the total top-up and total balance, also the extension and account top-up and balance.

- 🔒 : Locked. The extension is locked, and could not be used to dial out make outbound calls.
- 🔓 : Available. The extension is available to be used.

Set Billing for an Extension

1. Go to **Billing > Extension**, choose an extension and click ✏.
2. Configure the billing settings for the extension.

- **Charged From**: Select a billing mode.
  ◦ **Extension**: The bill will be charged from the extension.

- ◦ **Account**: If the extension is shared by multiple accounts, you can choose to charge the cost from account. When dialing out using the extension, the users need to enter their account credentials.
- ◦ **Don't Charge**: Don't bill any phone calls for the extension.
- **Credit Limit**: Set the credit limit.
  - ◦ If the pay type is prepaid, when the extension balance is less than the **Credit Limit**, it will not be able to dial out external numbers.
  - ◦ If the pay type is postpaid, the "**Credit Limit**" is the total amount the extension can owe.
- **Status**: Set the extension status.
  - ◦ Available
  - ◦ Locked
- **Pay Type**: Choose the pay type.
  - ◦ Prepaid
  - ◦ Postpaid

3. Click **Save** and **Apply**.

Set Billing for Bulk Extensions

1. Go to **Billing > Extension**, select the checkbox of the desired extensions, and click **Edit**.
2. Select the checkbox of the options that you want to edit, and configure them.

3. Click **Save** and **Apply**.

Top up an Extension

1. Go to **Billing > Extension**, choose an extension, click 📑.
2. Enter the top up amount, and click **Top Up**.

Top up Bulk Extensions

1. Go to **Billing > Extension**, select the checkbox of the desired extensions, and click **Top Up**.
2. Select the extensions that you want to top up to the **Selected** box, click **Top Up**.

Account Billing

The Billing App supports to charge cost from an account. This solution is typically for a shared extension, which is shared by multiple users. Everyone can use the extension to make outgoing calls with their personal account credentials.

Go to **Billing > Account** to configure the billing settings for the accounts.

At the top of the page, you can see the total top-up and total balance, also the extension and account top-up and balance.

- : Locked. The account is locked, and could not be used to dial out make outbound calls.
- : Available. The account is available to be used.

Add an Account

1. Go to **Billing > Account**, click **Add**.
2. Configure the account settings.

- **Account**: You can fill in letters or numbers.
- **Credit Limit**: Set the credit limit.
  - If the pay type is prepaid, when the account balance is less than the **Credit Limit**, it will not be able to dial out external numbers.

      ◦ If the pay type is postpaid, the **Credit Limit** is the total amount the account can owe.
- **Status**: Set the account status.
    - **Available**: the account is available to use.
    - **Locked**: the account could not be used to dial out make outbound calls.
- **Pay Type**: Choose the pay type.
    - **Prepaid**
    - **Postpaid**
- **Password**: Set a password for the account. When users will call out by the account, they need to enter the password.

> ✎ **Note:**
> The password for accounts cannot be the same.

3. Click **Save** and **Apply**.

Top up an Account

1. Go to **Billing > Account**, choose an account, click .
2. Enter the top up amount, and click **Top Up**.

Top up Bulk Accounts

1. Go to **Billing > Account**, select the checkbox of the desired accounts, and click **Top Up**.
2. In the **Top Up** field, enter top up amount.
3. Select the accounts that you want to top up to the **Selected** box, click **Top Up**.
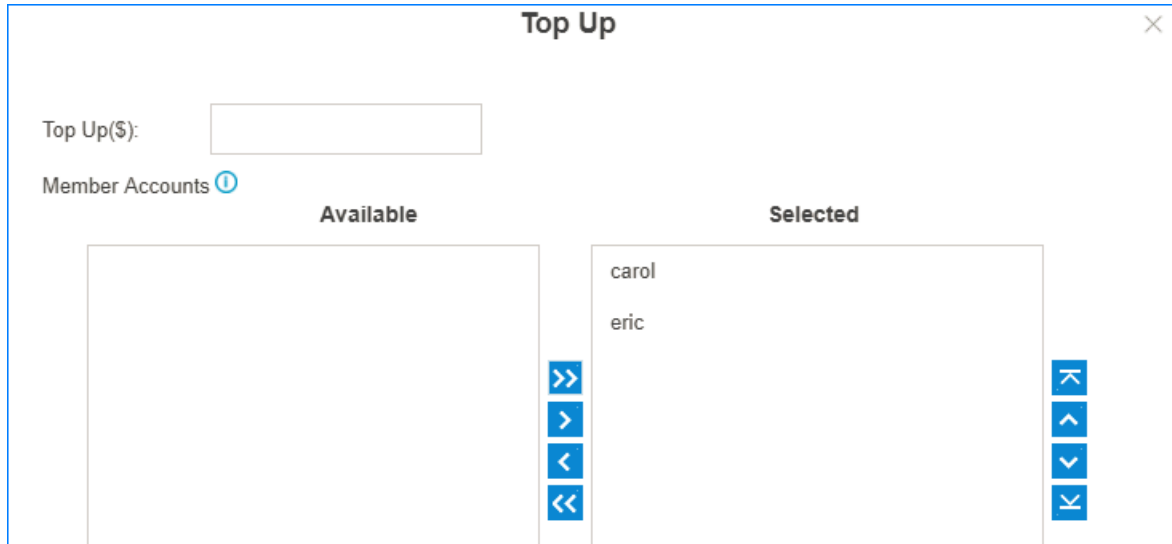
Billing Rate

Set up billing rate according to extensions/accounts, time periods, call duration, call types (whether it's local or international, from landline or mobile phone).

When calls are made to external numbers, they are checked against the "Match Pattern", "Number Length", and "Time".

System will match the called number with billing rates from top to bottom. You can adjust the rate sequence by clicking these buttons ⊻ ⊼ ⋁ ⋀.

The matching priority is as bellow:

1. Time
2. Number Length
3. Match Pattern

	Match Pattern	Number Length	From	To	Rate	Billable Unit	Initial Cost	Initial Time	Operation
☐	550	7	00:00	23:59	2.50	60	0.00	60	⊗ ⊘ ⊻ ⊽ ✎ 🗑
☐	00		00:00	23:59	5.00	60	0.00	60	⊗ ⊘ ⊻ ⊽ ✎ 🗑
☐	1	5	00:00	23:59	0.00	60	0.00	60	⊗ ⊘ ⊻ ⊽ ✎ 🗑

Call Costs

If a match is found then the cost is calculated as follows:

- Total Cost = Initial Cost + Billable Unit Number * Rate (less than one billing unit will be regarded as one billing unit).
- If the talking time is less than the "Initial Time", the Total Cost = Initial Cost.

Below is an example billing rate setting, please check call cost details for different calls.

- Initial Time: 120 seconds
- Initial Cost: 0.2$
- Rate: 0.3$
- Billable Unit: 60 seconds

Table 1. Billing Rate setting example

Talk Time (s)	Total Cost ($)	Call Cost Details
68	0.2	Talk Time(68) < Initial Time(120) Total Cost = Initial Cost
125	0.5	Talk Time: 125=120+5 Total Cost: 0.2+0.3*1=0.5
180	0.5	Talk Time: 180=120+60*1 Total Cost: 0.2+0.3*1=0.5
190	0.8	Talk Time: 190=120+60*1+10 Total Cost: 0.2+0.3*2=0.8
380	1.7	Talk Time: 380=120+4*60+20 Total Cost: 0.2+0.3*5=1.7

Call Rate Settings

Go to **Billing > Rate** to add or edit billing rate.

General Settings of Rate

- **Match Pattern**: The prefix of the called number. This setting must match the dial pattern of the outbound routes in your PBX. Leave it blank, the rate will apply to all numbers.

  > ⛔ **Restriction:**
  > Wildcard character . and ! are not allowed.

- **Number Length**: Used to restrict the length of called number. If the length of dialed number is shorter or equal to the "Number Length", the rate will apply to it. Leave it blank, the rate will apply to all numbers.
- **Rate**: After the initial time, each billable unit will be charged with this rate.
- **Billable Unit**: Set the billable unit after initial time. If the rate is $0.2 and billable unit is 60 seconds, the call you make will cost $0.2 per 60 seconds (less than one billing unit will be regarded as one billing unit).

Other Settings of Billing Rate

- **Initial Time & Initial Cost**: If the **Initial Cost** is `$0.2` and the **Initial Time** is `60` seconds, it means the first 60 seconds of this call will cost $0.2.
- **Time**: Set when the rate will be applied to.
- **Days of Week**: Set which days will the rate applies to.
- **Member Extensions**: Choose which extensions will the rate applies to.
- **Member Accounts**: Choose which accounts will the rate applies to.

Import/Export Call Rates

You can import and export rate rules; this helps you manage billing rates easily.

Go to **Billing > Rate** to import or export the call rates.

- Click **Import** to import a guest list

> **ⓘ Tip:**
> You can export a guest file from PBX and use it as a sample to start with.

- Click **Export** to export the guests into a `csv` file

Top up History

Check or search the top up history of extensions and accounts.

Go to **Billing > Top up History** to check the top up history of extensions and accounts.

- Click **Top Up**, and select extensions/accounts to top up for them.
- Click **Clear Balance**, and select extensions/accounts to clear their balance.

Billing Logs

Go to **CDR and Recording** to check the billing logs.

Click ⚙ and select **Cost** option, the cost for each call will be displayed.

Edit List Options

Please choose the item shown in the list:

☑ Time   ☑ Call From   ☑ Call To

☑ Call Duration (s)   ☑ Talk Duration (s)   ☑ Status

☐ Source Trunk   ☐ Destination Trunk   ☐ Communication Type

☐ PIN Code   ☐ DID   ☐ DOD

☐ Caller IP Address   ☑ Cost

Restore Defaults

Searching Criteria

You can search CDR and recordings by the following criteria:

- **Time**: Set the start date and the end date to filter the call logs that are in the date duration.
- **Call From**: The number or the name of the caller.
- **Call To**: The number or the name of the callee.
- **Call Duration**: The time between the call started and the call ended. Enter a value to filter the call logs that have call duration equal or greater than this value.
- **Talk Duration**: The time between the call answered and the call ended. Enter a value to filter the call logs that have talk duration equal or greater than this value.
- **Status**: Call status, including "answered", "no answered", "busy", "failed", and "has voicemail".
- **Communication Type**: Communication type, including "internal", "inbound", "outbound", "callback", "PBX warning call", "transfer", and "multisite interconnect".
- **Include Recording Files**: Check the option if you want to filter the calls that had been recorded.
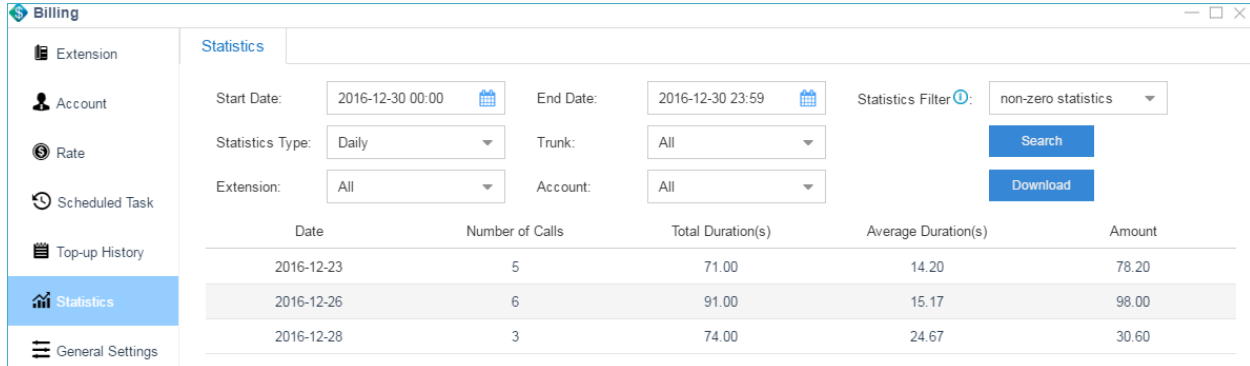- **Cost**: The billing cost for this call.

> **Note:**
> This option for Billing App.

Billing Statistics

Go to **Billing > Statistics** to search and check billing statistics.

You can search billing statistics by the following criteria:

- **Start/End Date**
- **Statistics Filter**
  - `None-zero statistics`: the calls that have zero cost will not be analyzed in the statistics.
  - `All statistics`: all calls including the calls that do not generate cost will be analyzed.
- **Statistics Type**: Set type as `Daily`, `Monthly`, or `Annually`.
- **Trunk**: Which trunk was used to call out.
- **Extension**
- **Account**