



Quick Start Guide

February 3

2014



PREVIEW RELEASE

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What is CDR2Cloud

CDR2Cloud is a modern, reliable, easy to use, one-stop online billing service that gives you billing and management metrics from your Call Detail Record (CDR) files. Whether your network processes one hundred or one million calls / transactions per day, CDR2Cloud ensures that you reliably rate and bill every single call / transaction.

Account Sign Up

Follow the steps below to sign up for an account.

Request an Account

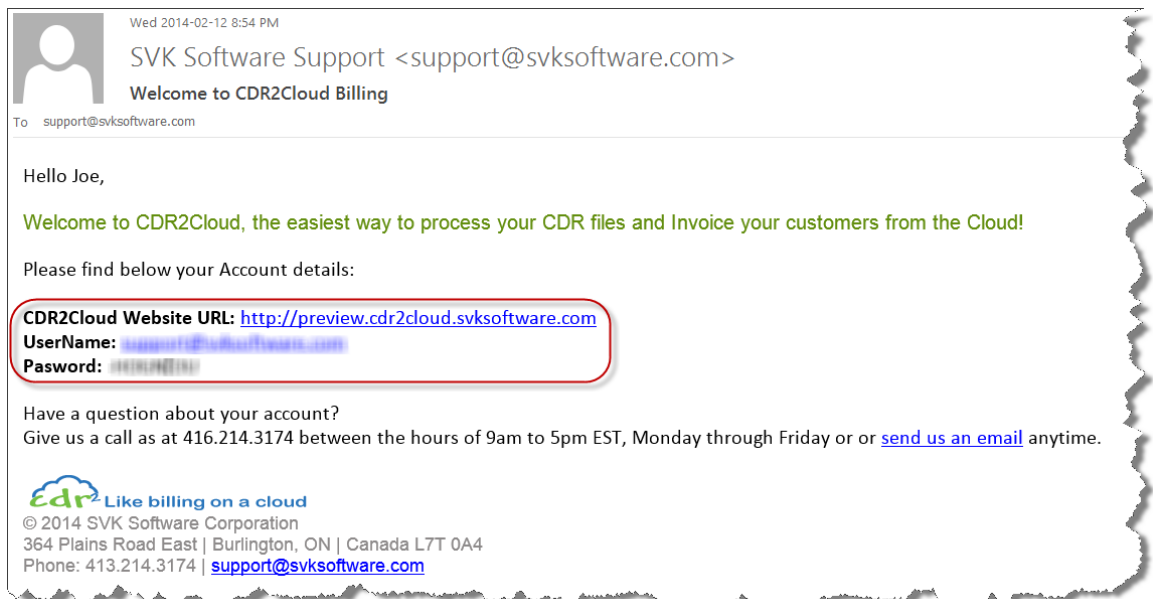
1. Visit the website www.svksoftware.com and click the on the **PRICING** menu link
2. Click the **CDR2Cloud PREVIEW RELEASE** link
3. Read the **PREVIEW SUPPLEMENTAL TERMS** and if you accept the terms click the **request preview account** button
4. Complete the Preview Request Form and submit

Submit CDR Sample file

5. Use the submission code obtained from the previous step to email a sample of our CDR file(s) to support@svksoftware.com.

Receive Account Information

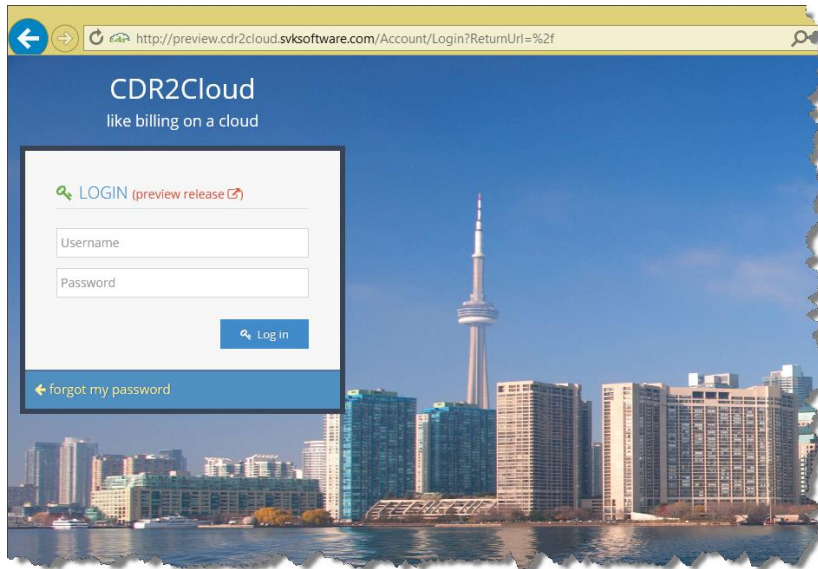
6. Check your email for the CDR2Cloud Preview Account Notification and use the **[user-name]**, **[password]** and **[website-url]** supplied.



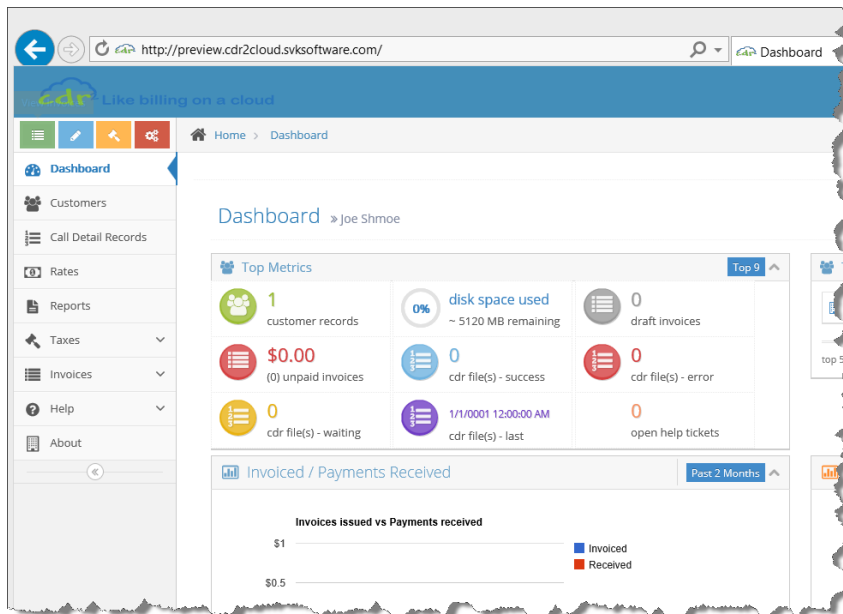
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Logging into your Account

1. Using the [user-name], [password] and [website-link] received in the CDR2Cloud Preview Account Notification email, visit the CDR2Cloud website and log into your account.



2. After successful account login, you will be directed to the Management Dashboard for your account.

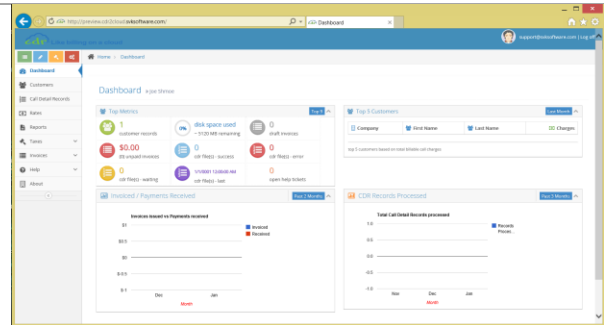
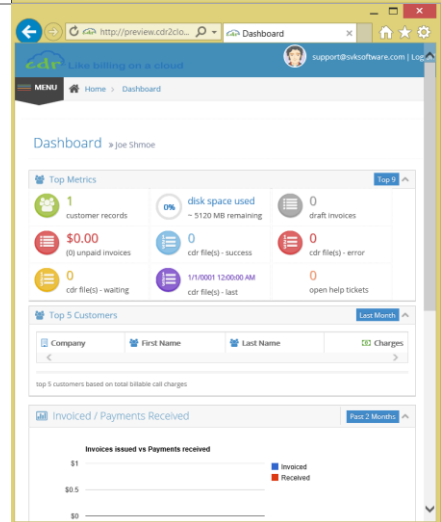
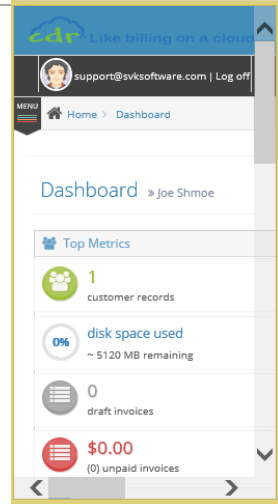


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CDR2Cloud

User Interface

Let's take a moment to review the CDR2Cloud User Interface. CDR2Cloud uses a **Responsive Web Interface Design**. This means that the CDR2Cloud Web Interface will detect the screen size of your web browser and change its layout accordingly. As such the CDR2Cloud User Interface will look differently on a computer screen, tablet device or smart phone as shown below:

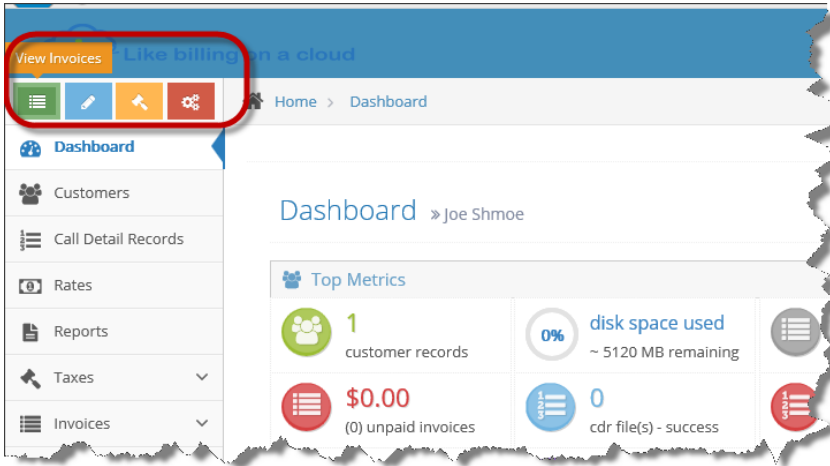
	<p>Desktop</p>
	<p>Tablet</p>
	<p>Smart Phone</p>

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Interface Components

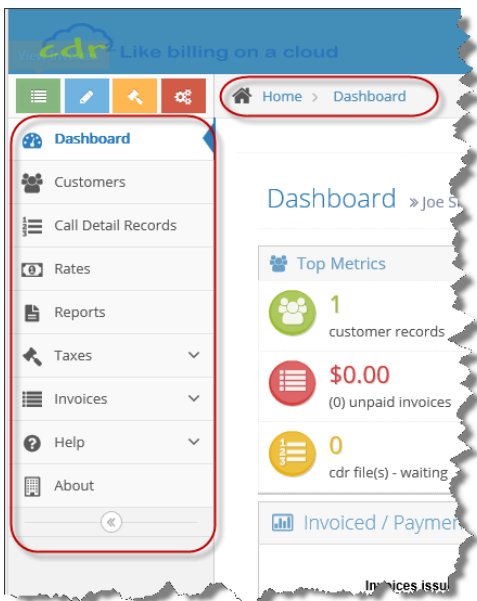
Quick Launch Menu Buttons

The Quick Launch Menu Buttons allow “quick” access to commonly used modules. Hovering the mouse over each button will display a pop-up notification describing the buttons quick launch action. On a tablet/smart phone you can display the pop-up notifications by doing a single click.



Menu Buttons

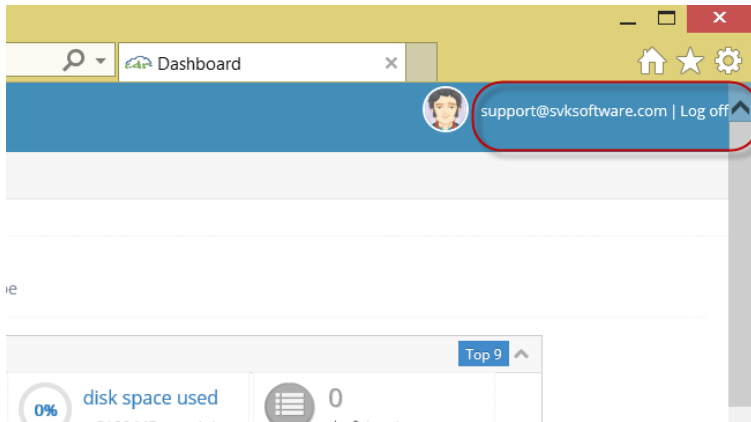
The Menu Buttons allow access to all modules. Menu buttons will “maintain state” by indicating the module that is currently active. So too will the “breadcrumb” indicator at the top of the page.



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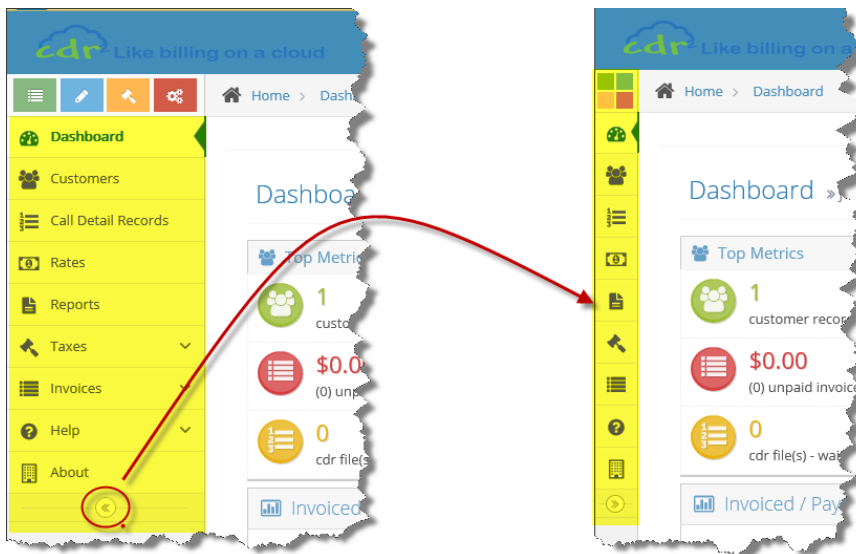
User Settings & Log off link buttons

At the top right of the screen you will find the user settings and log off link buttons. The user settings link button appears in the form of the currently logged on users email address.



Hide Menu Button (Desktop View Only)

The Hide Menu Button (available in Desktop View only) allows you to reduce the main menu to 1/8 of its regular size and therefore giving you more display space for the active module. Clicking the Hide Menu Button once more will restore the main menu to its original size.



Modules & Demo Data

When your account is created you will have access to all the CDR2Cloud Modules as well as some “Demo” data that is added to your account. The demo data allows you to get up to speed quickly start processing CDR files immediately without having to configure your account from scratch.

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Let's review the Modules along with the demo data for each module:

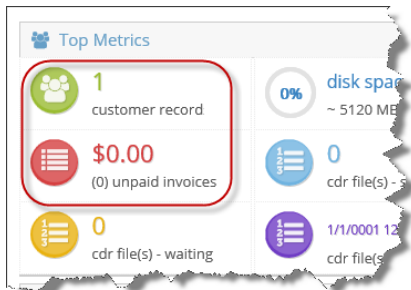
Dashboard

The Dashboard gives a “birds-eye-view” of your accounts operation and is made up of 4 separate Web-Parts.

Top Metrics – this Web-Part shows indicators for various things such as the number of customer you have, the amount of disk space you have consumed with CDR files, total amount of unpaid invoices, etc.

For Example:

From the demo data added to your account you will see that you currently have 1 customer and no unpaid invoices.



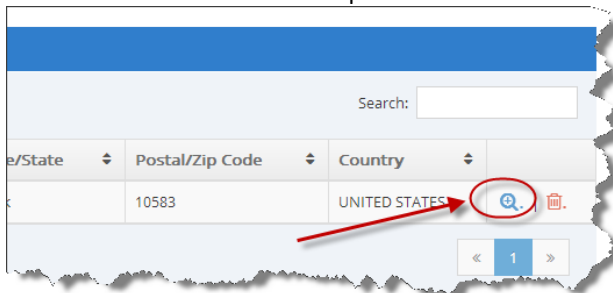
Top 5 Customers – this Web-Part shows a listing of your top 5 customers in the previous month based on invoiced amounts.

Invoiced / Payments Received – this Web-Part shows a bar graph that displays a comparison of Invoices sent versus payments received for the past 3 months.

CDR Records Processed – this Web-Part shows a bar graph that displays a comparison of the total CDR records processed over the last 3 months.

Customers

The Customers module gives you access to all your customer records. You will notice that you already have one customer named **John Doe**. This is a demo customer record that we will use later to bill and Invoice some calls to. You can open the customer record by clicking the **magnifier** button as shown below:



Rates

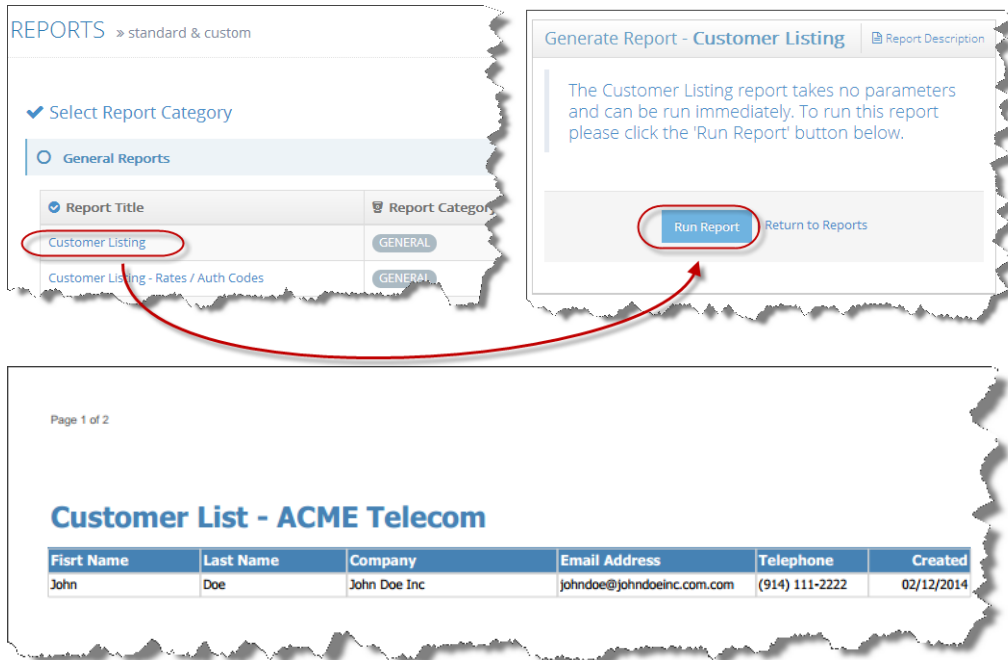
The Rates module gives you access to Rate Tables and Rates. To rate your CDR file and charge calls to your customer(s) each customer must be assigned to a Rate Table. You will notice that you already have one

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Rate Table called **Demo Rates**. Click on the **magnifier** button to open the Demo Rates. You will notice that there are 10 Rate Patterns (0-9) each having a Day, Evening and Night time incremental charge defined.

Reports

The Reports module gives you access to all the “Default” Reports assigned to your account. In the future you may see additional reports as well as **Custom** reports that you may request as your business dictates. Expand the **General Reports** and click the **Customer Listing** Report, then click **Run Report**. This will display the customer listing report in PDF format allowing you to see the one customer you already have.



Taxes

The Taxes module gives you access to Tax Categories, Tax Rates and other fees that you can charge to calls as well as Invoice items. You will notice that you already have one Tax Category called **Demo Taxes**. Click on the **magnifier** button to open the Demo Taxes, then click on the **Taxes** Tab. You will notice that there is one Tax Rate called **SCT** that is setup to charge a tax rate of 12%.

Account Settings

The Account Settings module gives you Access to different settings for your account. To access the Account Settings module click on your email address in the top of the screen which will open the module. Here you will have access to your Contact, Billing, Credit Card, Password, Logo and other settings.

Call Detail Records

The Call Detail Records module allows you to upload and process CDR files. It’s always a good idea to ensure that all your customers are enrolled in a **Rate Table**, **Tax Category** and **Auth Code** before processing CDR files. At this point you have no CDR files in your account however we will upload and process a CDR file shortly. Once a file is uploaded to your account you can process and reprocess the file as many times as is required.

Invoices

The Invoice module allows you to create, edit, print and delete Invoices. At this stage you have no Invoices in your account, however we will generate an Invoice shortly.

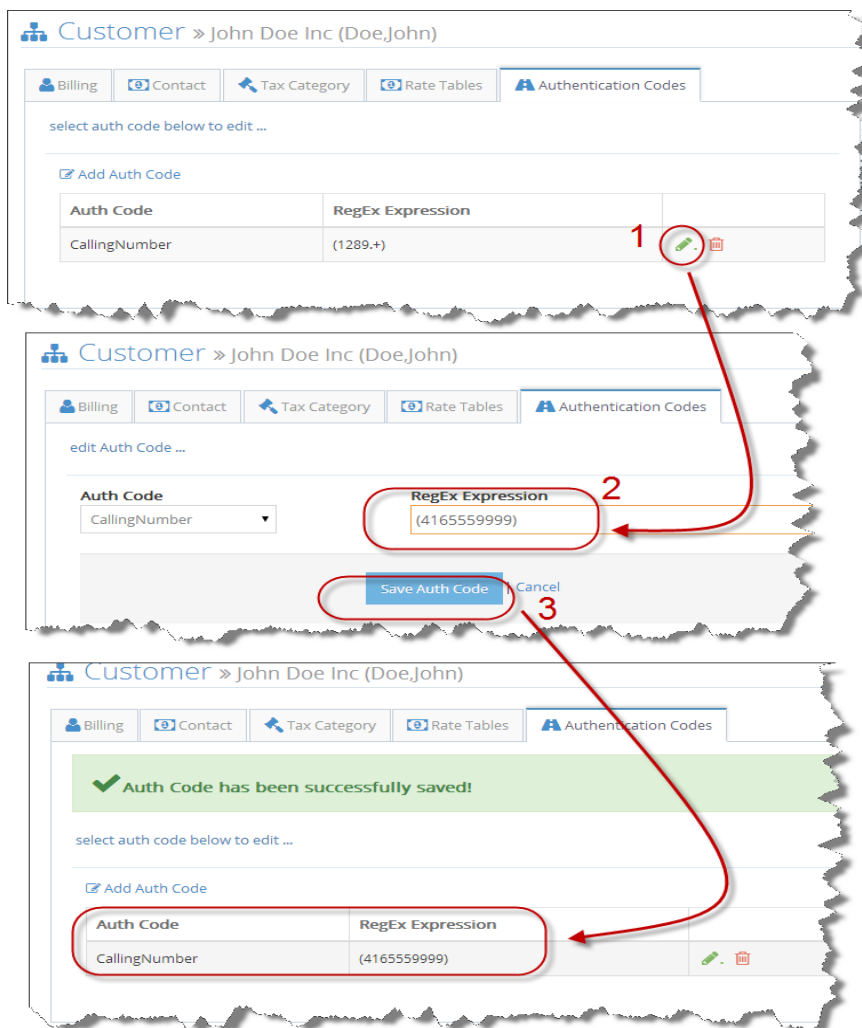
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Walkthrough: Process your First CDR File

At this point we will process a CDR file, generate an Invoice and email it to our customer. Please follow the steps below:

Set Customers Auth Code

- 1) Click on the **Customers** menu and open the account for customer John Doe by clicking on the **magnifier** button.
- 2) Click on the **Authentication Codes** tab to display the current [Auth Code] / Regular Expression setting for that customer.
- 3) Edit the [Auth Code] setting by clicking the Edit link button (green pencil) and set the Regular Expression to be any Calling Number that exist in your sample CDR file. Here I will set the [Auth Code] to be (4165559999) as show below.



By setting the **Auth Code: CallingNumber =(4165559999)** we are instructing CDR2Cloud to bill all calls that have a Caller-ID of '4165559999' to the customer John Doe.

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Upload & Process the CDR File

- 1) Click on the **Call Detail Records** menu and using the CDR Type dropdown, select the CDR Type for the file that you will be uploading. For this walkthrough I will be using a Go2Tel CDR file so I will select GO2TEL.
- 2) Click on the **“Drop CDR files”** icon to select the location of your CDR file that you will upload. Once selected your screen should look similar to below:



- 3) Click the [Upload File(s)] button to upload the file to your account. Once uploaded you should see the file in the [cdr file activity] window with a status of **not processed** as shown below:

The screenshot shows the 'cdr file activity ...' window containing a table with the following data:

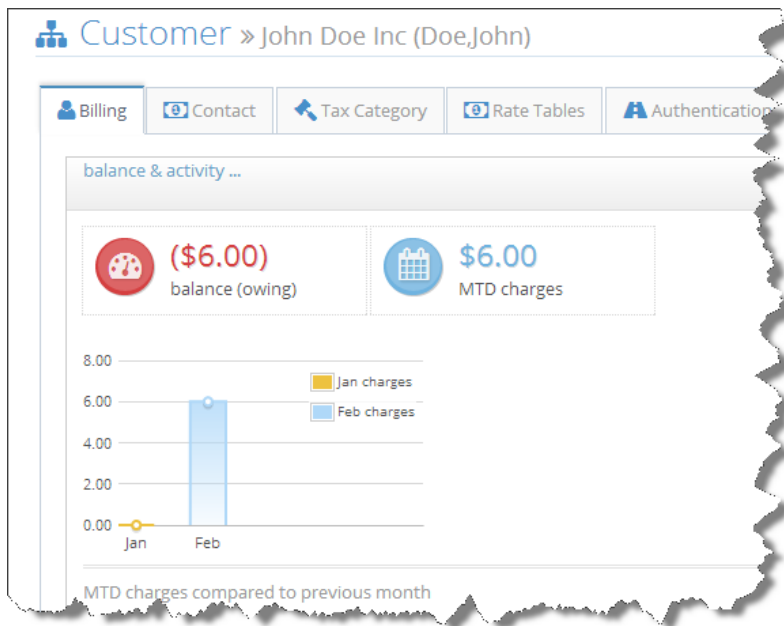
CDR File Name	Uploaded	Uploaded By	Records	Type	Status	Actions
GoToTel Demo CDR.txt	2/13/2014	support@svksoftware.com	0	GO2TEL	not processed	

- 4) Click on the green lightning bolt button to process the CDR file. This will start the process and you will notice that the status of the file changes from **not processed** to **processing**. Once completed progress bar will disappear and the status of the file will change to **processing completed** as shown below:

cdr file activity ...

CDR File Name	Uploaded	Uploaded By	Records	Type	Status	Actions
GoToTel Demo CDR.txt	2/13/2014	support@svksoftware.com	1000	GO2TEL	processing completed	

- View the Customers Billing by clicking on the Customers menu. You will notice that your customer now has a balance owing as well as month to date charges. In my file there were \$6.00 worth of calls that were billed to my customer John Doe (your amounts will be different).



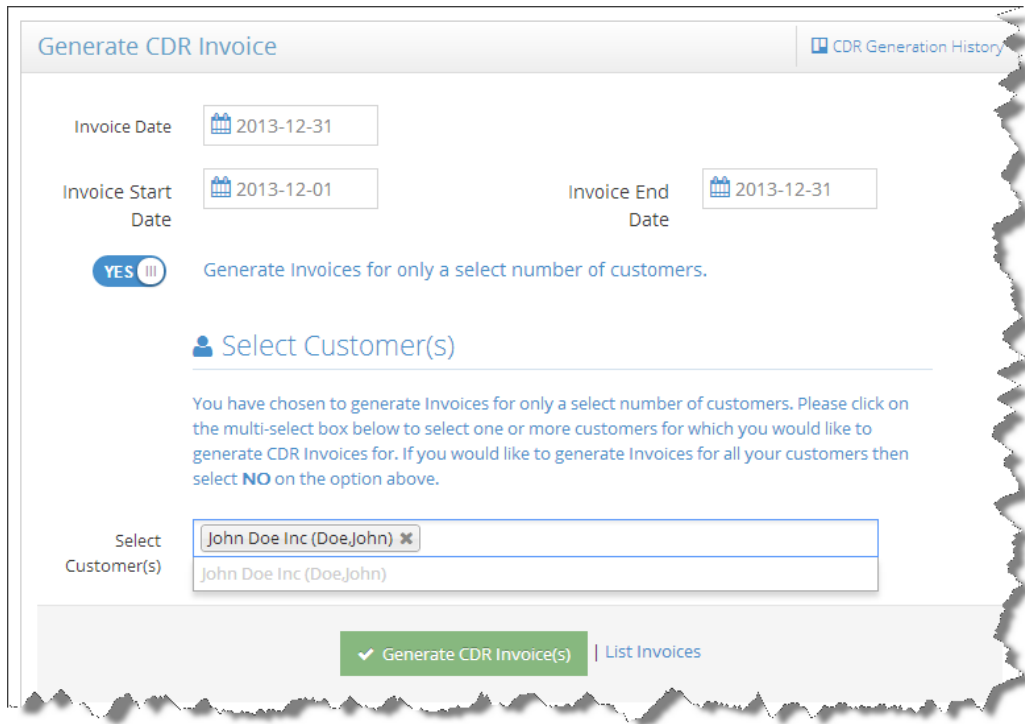
Upload & Process the CDR File

- Click the **Invoices** menu then click **View Invoices**, you will notice that there are no Invoices in your account. This is because processing CDR files does **not** automatically produce Invoices, you must generate Invoices as a separate process.
- Click the **CDR Invoice** sub menu and select an Invoice Date, Invoice Start Date and Invoice End Date that is relevant to the date of CDR records in your file. In my file all CDR records were dated for December 2013 so I will select the following dates:

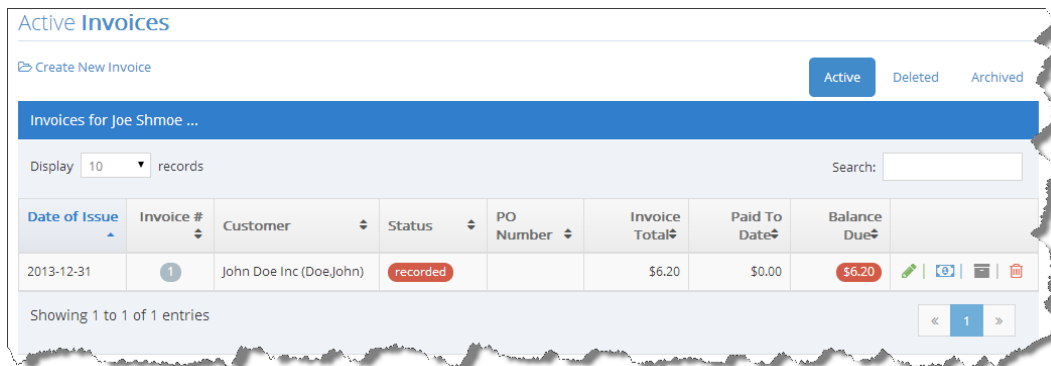
Invoice Date – Dec 31 2013
 Invoice Start Date – Dec 1 2013
 Invoice End Date – Dec 31 2013

In the Select Customers dropdown box select our customer John Doe as shown below:

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- 3) Click the Generate CDR Invoice(s) button to generate the Invoice.
- 4) Click the **View Invoices** sub menu and you will notice that we now have one Invoice issued to our customer John Doe that has a **recorded** status. An Invoice can have **recorded** or **draft** status. A recorded status indicates that the invoice is confirmed and the invoice total has been debited to the customer's account balance. A draft status means that the invoice is not yet confirmed and the invoice total has not been debited to the customer's account.



- 5) Open the Invoice by clicking on the green pencil link button and review the Invoice details. Notice that the Tax Total as well as the Tax description of "SCT-(0.12)". Also take note of the Invoice Item description:

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CUSTOMER INVOICE (RECORDED)

Invoice #: 00000001
 PO Number:
 Invoice Date: 12/31/2013
 Pay in Days: 5

Company Info

- ACME Telecom
- 364 Plains Road East,
- Burlington
- ON, CANADA
- L7T 0A4
- (555) 555-5555
- support@svksoftware.com

Customer Info

- John Doe Inc (Doe,John)
- 45 Tuckahoe Road
- Yonkers, New York
- UNITED STATES
- 10583
- (914) 111-2222
- johndoe@johndoeinc.com

Item	Description	Unit Cost	Qty	Line Total	Delete
CDR	Call Detail Records for the period 12/01/2013 to 12/31/2013 ...	5.54	1	5.54	

SUB TOTAL: 5.54
 TAX TOTAL: 0.66
 INVOICE TOTAL: 6.20
 PAID TO DATE: 0.00

Comments (visible to customer) | Comments (Private)

6) Click the View/Print Invoice button to open the Invoice in PDF format

PAST DUE

Invoice

Date: 2013-12-31
 Invoice No.: 00000001
 Due Date.: 2014-01-05

ACME Telecom
 364 Plains Road East
 Burlington, ON
 CANADA
 L7T 0A4
 support@svksoftware.com
 T: (555) 555-5555

Bill To:
 John Doe Inc
 45 Tuckahoe Road
 Yonkers, New York
 UNITED STATES
 10583
 johndoe@johndoeinc.com
 T: (914) 111-2222

Qty	Description	Unit Cost	Line Total
1	Call Detail Records for the period 12/01/2013 to 12/31/2013 ...	\$5.54	\$5.54
Subtotal			\$5.54
Tax Total			\$0.66
Invoice Total			\$6.20
Balance Due			\$6.20

That's it!!

You just processed your first CDR file and invoiced your customer.

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