TELECA

Customer Portal Guide

Manage your numbers calls reporting billing and account

This guide explains how to navigate the Teleca customer portal, manage inbound service numbers, review call activity, use reporting tools and maintain your account.

Screens shown in this guide use demonstration data. Your available features and results may vary according to your services and subscription.

Contents

Quick navigation

Portal area	Use it to
Overview	See your inbound numbers and recent account activity.
Service Number Management	Configure routing and open number-specific tools.
Call Logs	Search call records and export results.
Reporting	Analyse calling patterns and create reports.
Invoices	Review and download invoices.
Payments	Manage payments, payment methods and balance triggers.
My Info	Maintain account details and notification preferences.

1 Getting started

After signing in, use the main navigation menu to move between the portal areas. Select Log Out when you have finished, particularly on a shared computer.

Video tutorial: How to Log in with a Link Request (35 seconds)

Protecting your account information

- Do not share your Support PIN, password or full payment details by email.
- Check screenshots before sharing them because call logs can contain caller and destination numbers.
- Store downloaded CSV and PDF files in an approved secure location.

2 Overview

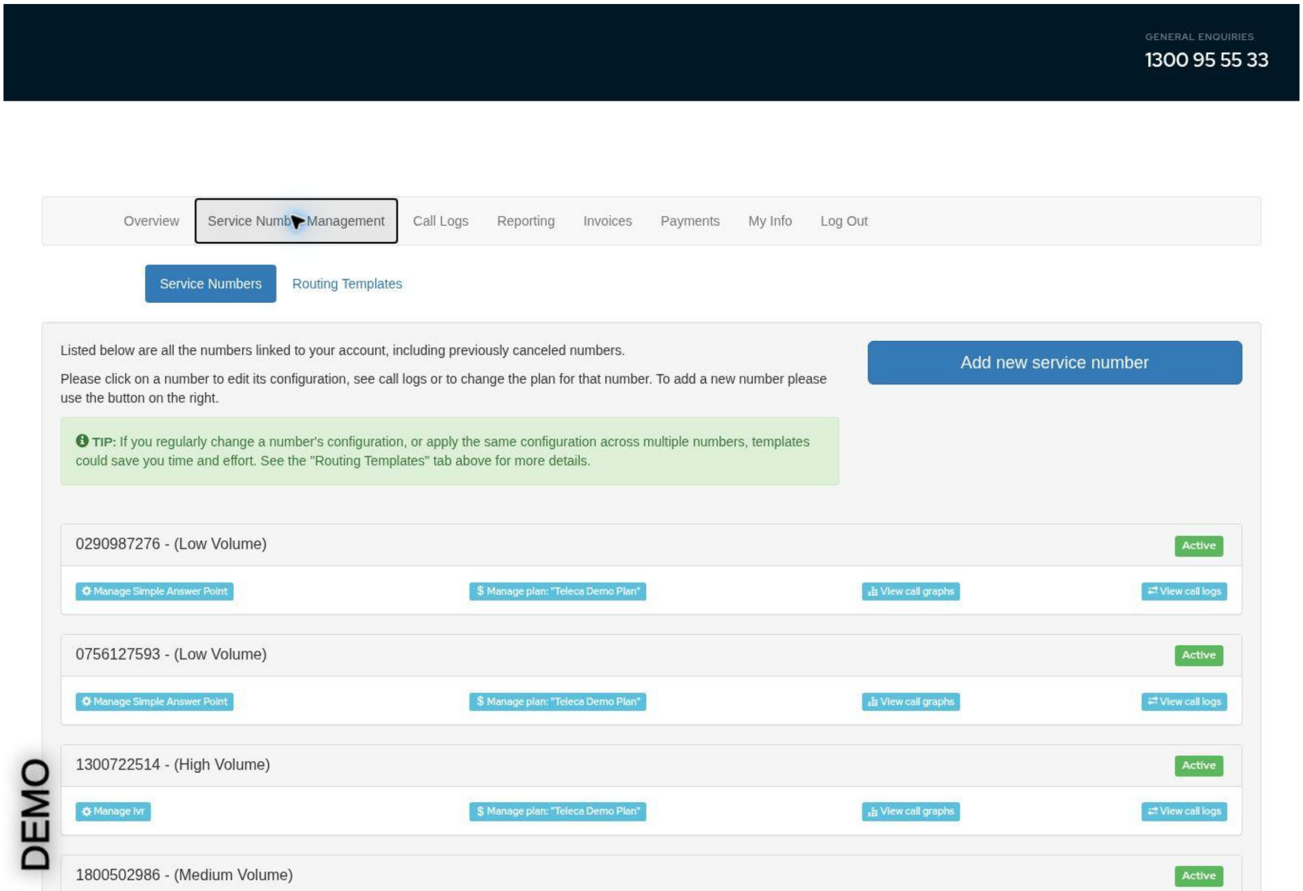
Overview is the starting point for your Teleca services. It provides a quick view of your inbound service numbers, recent call activity, account balance and recent payments.

- My Inbound Service Number List shows each service, its group or volume label, routing type and status.
- Add new service number begins the process of obtaining another number.
- Routing templates provides access to reusable call-routing configurations.
- The Calls chart summarises activity for the selected period.
- Recent Payments displays recent account transactions and links to the full payment history.

Your Account Number and Support PIN may also appear on this page. Keep both details private and provide your Support PIN only through an authorised Teleca support channel.

3 Service Number Management

Select Service Number Management to view all numbers linked to your account, including previously cancelled numbers. Each number has shortcuts to its routing, plan, graphs and call logs.



Service Number Management and the actions available for each number.

Action	What it opens
Manage routing type	Features and Routing for the selected number.
Manage plan	Plan information for the selected number.
View call graphs	Number-specific call graphs.
View call logs	Number-specific call records.
Add new service number	The new-number setup process.
Routing Templates	Reusable routing configurations.

Adding or transferring a service number

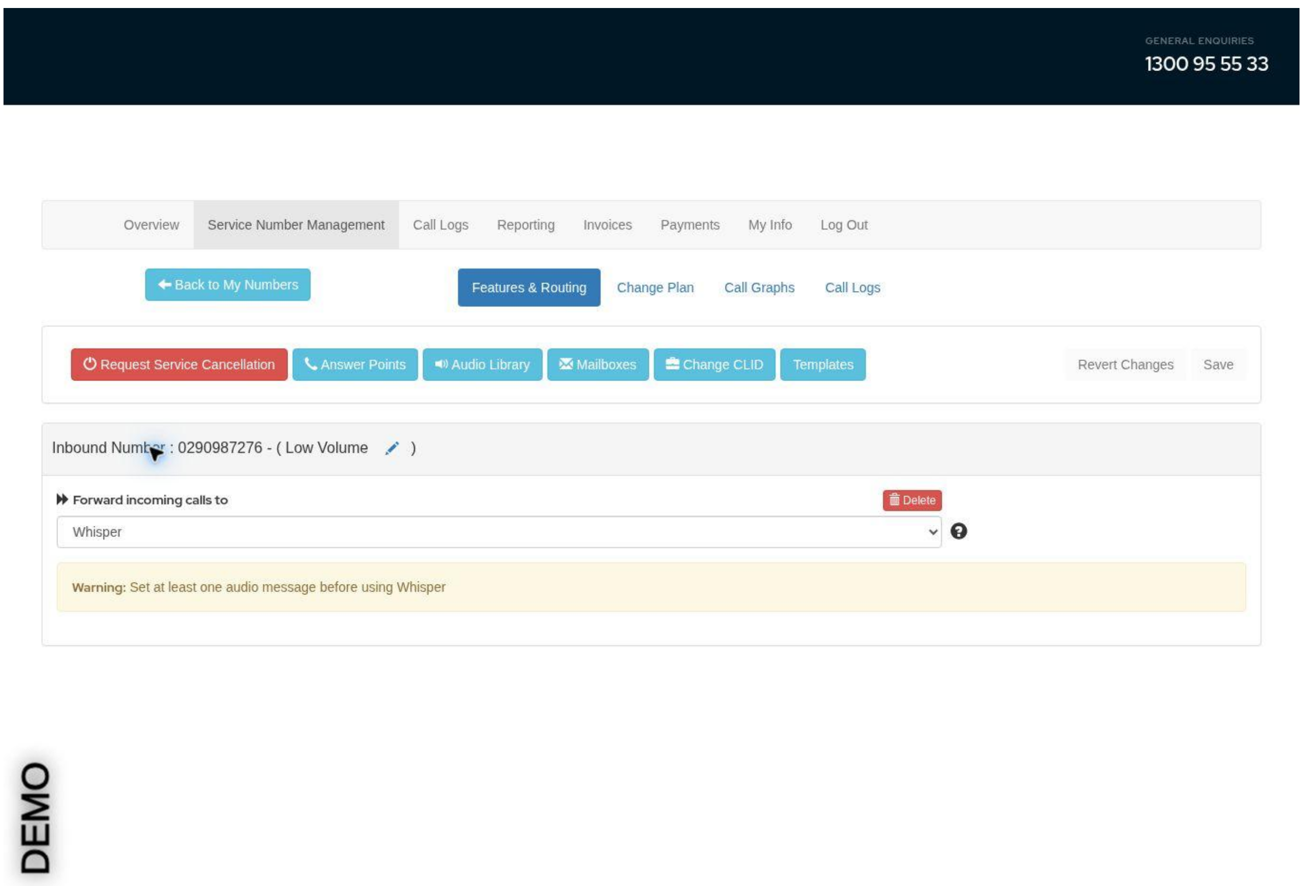
Video tutorial: [How to Instantly Add a New Service Number] (1 minute 2 seconds)

Video tutorial: [How to Submit a Transfer Request for an Existing Service] (1 minute 35 seconds)

Video tutorial: [How to Submit your SmartNumber for Activation] (1 minute 9 seconds)

4 Features and Routing

Open a service number and select Features and Routing to control how incoming calls are handled. The route is read from top to bottom. Depending on the selected feature, a call can continue to another step or overflow if it is not answered within a set time.



Features and Routing toolbar and routing workspace.

Control	Purpose
Answer Points	Save and label destination phone numbers.
Audio Library	Manage announcements, whispers and other recorded audio.
Mailboxes	Manage email destinations for voice messages.

Control	Purpose
Change CLID	Choose the caller ID presented for inbound service calls.
Templates	Open, apply or save reusable routing configurations.
Revert Changes	Discard unsaved routing changes.
Save	Apply the edited routing configuration.

Important: saving a routing change can immediately affect live incoming calls. Confirm every phone number, route, overflow option and timeout before selecting Save.

5 Routing features

Routing feature	What it does
Announcement	Plays information to the caller.
IVR Menu	Lets the caller choose a route using keypad input.
Mobile Masking	Provides mobile-number masking where available.
Round Robin	Distributes calls across destinations in rotation.
Simple Answer Point	Sends the call to one destination.
Simultaneous Ring	Rings several destinations at the same time.
Time Based Routing	Uses different routes according to the day or time.
Whisper	Plays a private message to the person answering before connecting the caller.
Fax to Email	Receives a fax and delivers it to email.
Hang Up	Ends the call.
Voice to Email	Records an unanswered voice message and sends it to a mailbox.

Routing video tutorials

Video tutorial: IVR Menu Configuration Instructions with Voice Over (2 minutes 29 seconds)

Video tutorial: Time or Day Based Routing Set Up (2 minutes 13 seconds)

Video tutorial: Mobile Masking Tutorial with Voice Over (2 minutes)

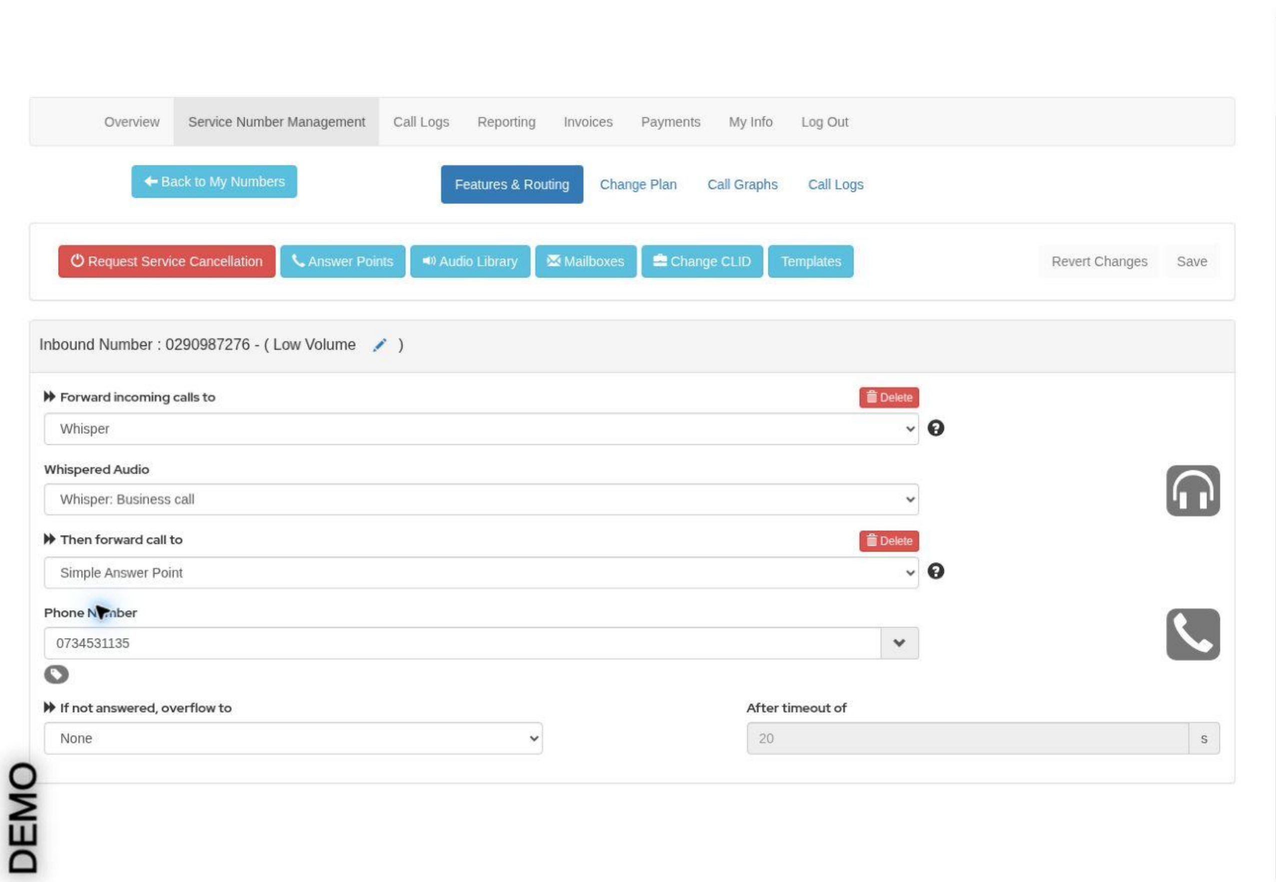
Video tutorial: How to Set Up Voice to Email with Voice Over (1 minute 47 seconds)

Video tutorial: Changing Answer Points (50 seconds)

Video tutorial: Identifying Customer Calls (1 minute 54 seconds)

Simple Answer Point and Whisper

A Simple Answer Point forwards calls to one phone number. A Whisper can be placed before it so the person answering hears a short identification message before the caller is connected.



Example route with a Whisper followed by a Simple Answer Point.

1. Choose Whisper in the first routing step and select an audio message.

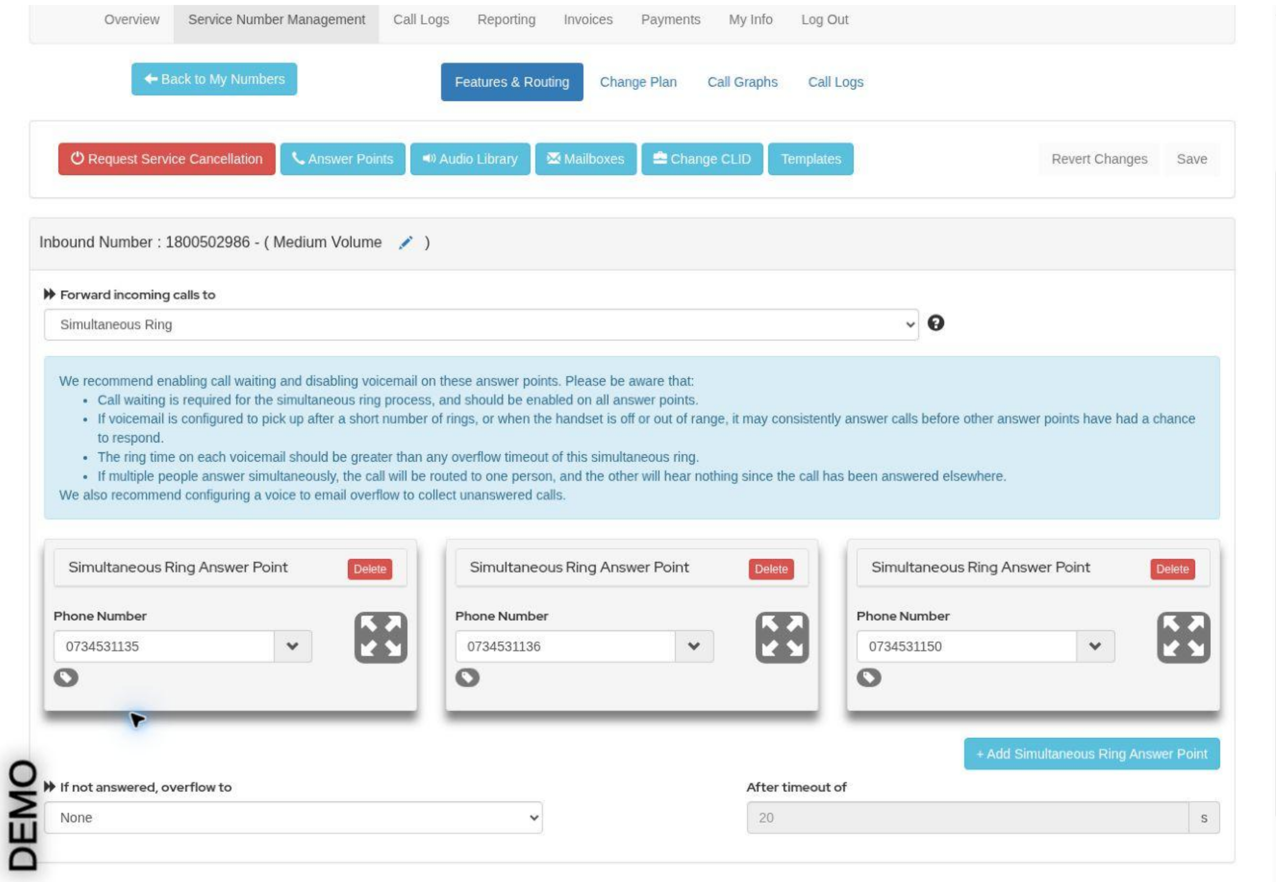
2. Add Simple Answer Point as the next step and choose the destination number.

3. Choose an overflow option and timeout if unanswered calls should continue elsewhere.

4. Review the complete route and select Save.

Simultaneous Ring

Simultaneous Ring calls several answer points at once. The first person to answer receives the call.



Simultaneous Ring with three answer points and an overflow timeout.

- Enable call waiting on every answer point.
- Disable handset voicemail or set it to answer after the Teleca overflow timeout.
- Set an overflow destination for calls that are not answered.
- Consider Voice to Email as the final overflow destination.

6 Answer Points Audio Mailboxes CLID and Templates

Answer Points

Answer Points let you label destination phone numbers so routing configurations are easier to understand. Use Add New Answer Point to store a number and label, or Edit to update an existing entry.

Audio Library

The Audio Library stores messages used by announcements, whispers and IVR menus. Existing audio can be played, edited, downloaded or deleted. New audio can be created with text to speech or uploaded as an audio file.

Mailboxes

Mailboxes provide email destinations for Voice to Email and scheduled reporting. When creating a mailbox, enter a mailbox name and at least one email address. Additional email recipients can be added where needed.

Change CLID

Change CLID controls the caller ID presented to staff receiving calls from the service. You can choose no inbound caller ID or an available number. A dedicated caller ID can help staff recognise business calls and assign a distinctive ringtone.

Routing Templates

Templates are useful when the same routing configuration is applied to several services or adjusted regularly. The Templates menu includes options to open the template list, apply a template to the current service and save the current service as a template.

Video tutorial: Setting Up a Template with a Voice Over (1 minute 38 seconds)

7 Plans and Call Graphs

Each service includes Change Plan and Call Graphs tabs.

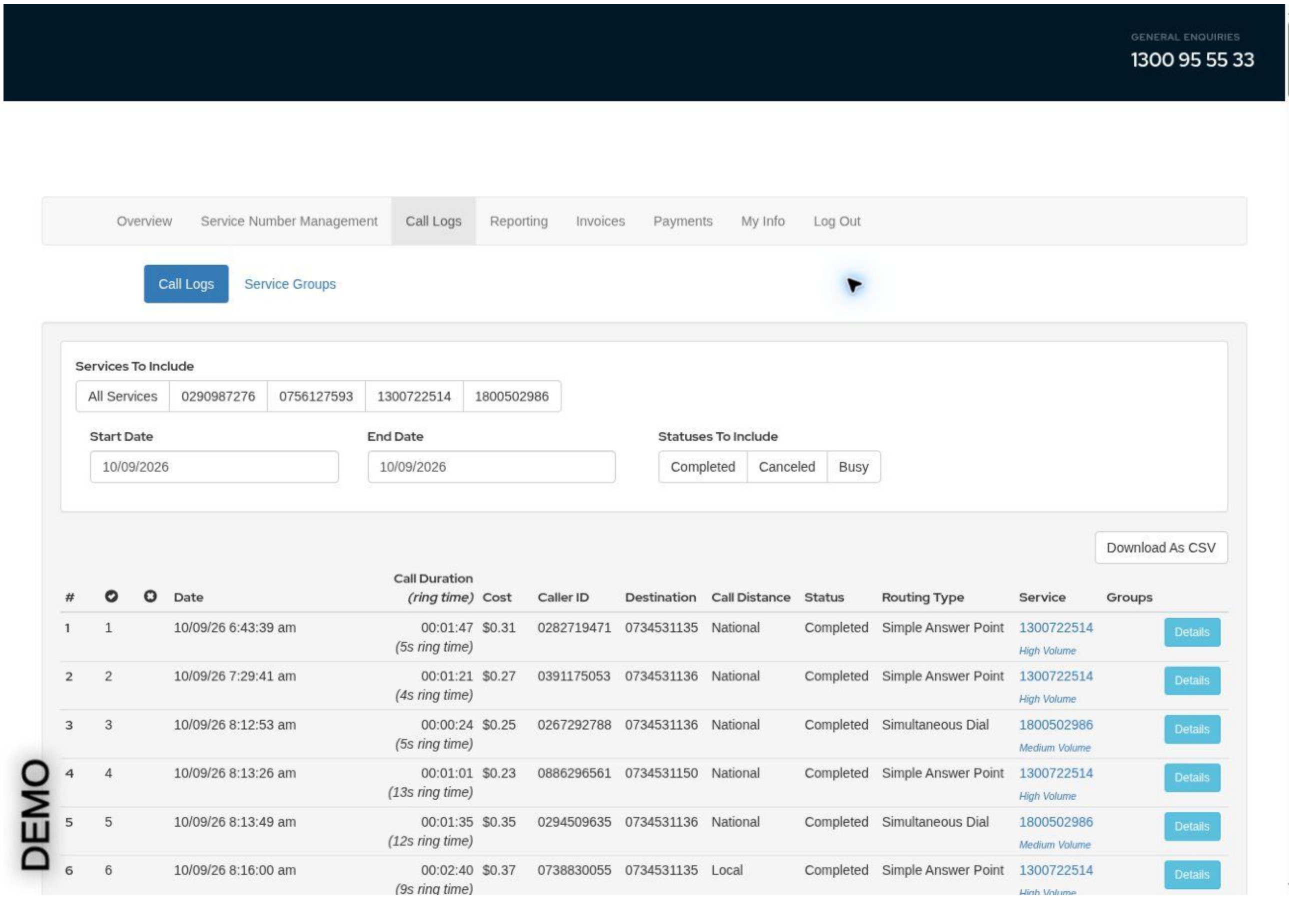
Change plans allows review of the services current plan, as well as listing alternative plan options for the service. Each plan has a 'show detail' button, which expands the plans information to provide further insight into the plan and costs.

Be aware of any 'Special Rates Warning' at the top of the plan page. If there is a warning, this indicates that your current plan will not be available again if you change to an alternate option. For further assistance with plans, including reviews and recommendations, please reach out to customer support.

Call graphs for individual services can be viewed to assist in determining call usage. You can choose to receive the data in monthly, daily or hourly increments and select the date ranges.

8 Call Logs

Call Logs lets you search activity across all services. You can also open a number-specific Call Logs tab from Service Number Management.



Call Logs with service, date and status filters.

1. Choose All Services or select one service number.

2. Enter the Start Date and End Date.

3. Select the statuses to include: Completed, Canceled and Busy.

4. Review the results or select Download As CSV.

Understanding the results

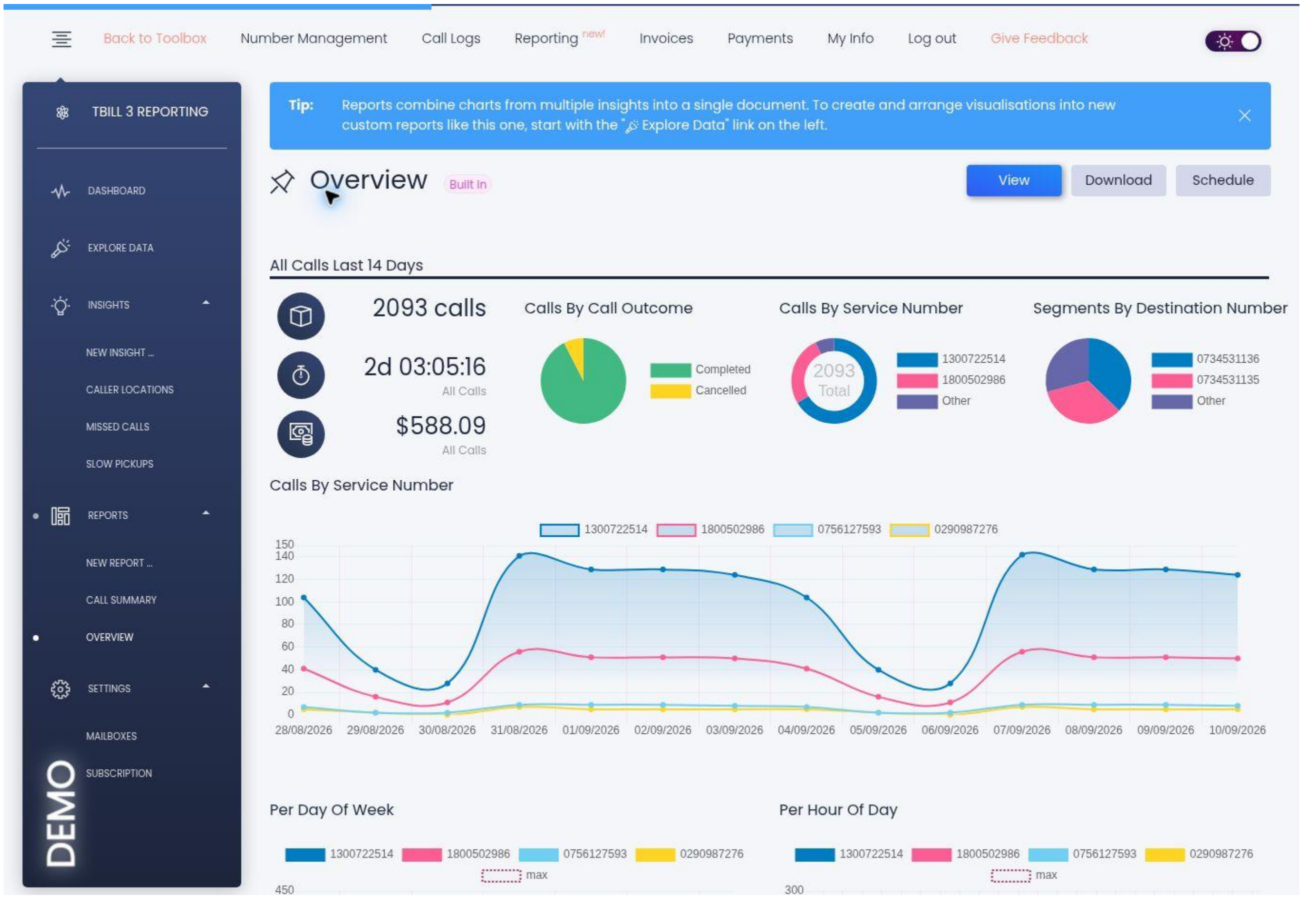
Field	Meaning
Date	When the call occurred.
Call Duration	Length of the connected call.
Ring time	How long the destination rang before the call was answered or ended.
Cost	Charge recorded for the call.
Caller ID	Number presented by the caller, where available.

Field	Meaning
Destination	Number that received the call.
Call Distance	Distance category recorded for the call.
Status	Outcome such as Completed, Canceled or Busy.
Routing Type	Feature that handled the call.
Service and Groups	Inbound service and any associated group.
Details	More information about an individual call.

Downloaded call logs may contain personal information. Share and retain exported files only where necessary.

9 Reporting

Reporting opens a dedicated reporting workspace. Use its sidebar to open Dashboard, Explore Data, Insights, Reports and Settings. Select Back to Toolbox to return to the main customer portal.



Built-in Overview report showing recent call activity and report actions.

Area	Purpose
Dashboard	Open the reporting overview and pinned content.
Explore Data	Build an analysis using metrics, filters, dates and grouping.
Insights	Open built-in analyses or create a reusable insight.
Reports	Combine insight visualisations into a report.
Mailboxes	Manage delivery destinations for scheduled reports.
Subscription	Review reporting features available to your account.

10 Built in reporting content

Overview report

- Call count, total duration and total cost for the last 14 days.
- Calls by outcome, service number and destination segment.
- Call activity by service number over time.
- Activity by day of week and hour of day.
- Caller locality and state analysis, including a map.
- Slow pickups for the last 14 days.

Call Summary report

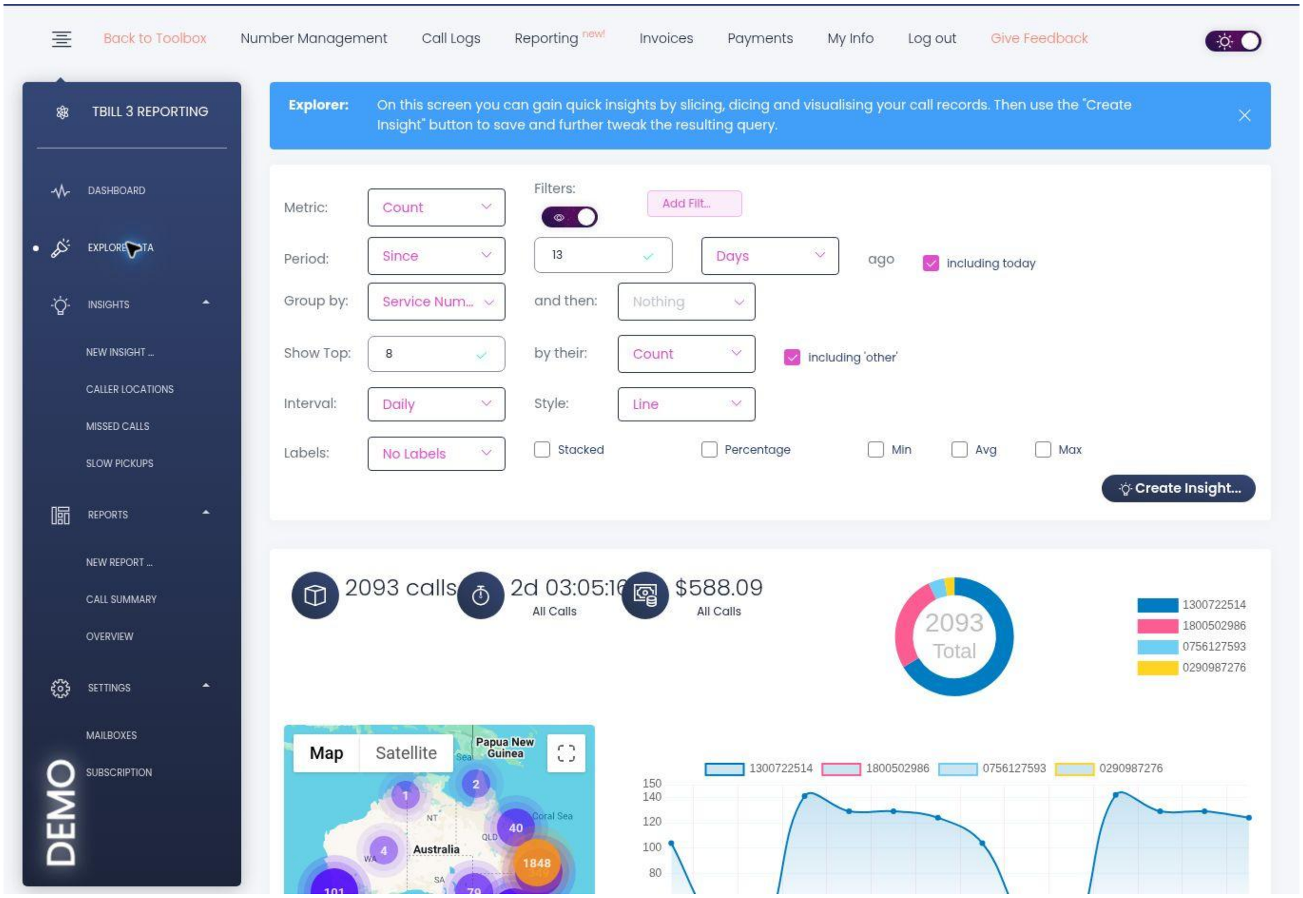
Call Summary provides duration, cost and call totals together with analysis by service, caller type, outcome, service group, recent activity and caller state.

Report actions

Action	What it does
View	Opens the interactive report.
Download	Creates a PDF version.
Schedule	Configures recurring delivery to a mailbox.
Pin to Dashboard	Adds the report to the reporting dashboard.

11 Explore Data

Explore Data lets you build an analysis without changing your underlying call records. The results update according to your chosen metric, filters, time period and grouping.



Explore Data controls and example visualisations.

Control	Available choices
Metric	Count, Duration, Ring Duration, Total Cost, Cost per Minute and Cost per Call.
Filters	Service, Routing, Caller, Call and Destination fields.
Period	Between or Since; days, weeks, months or years; optionally including today.
Group by	A primary field and optional secondary field.
Show Top	The number of leading results, ranking metric and optional Other group.
Interval	Hourly, Daily, Weekly, Monthly, Yearly, Time of Day, Days of Week, Days of Month or Months of Year.
Style	Line or Bar.
Labels	No Labels, Values or Percentages.
Options	Stacked, Percentage, Minimum, Average and Maximum.

Control	Available choices
Create Insight	Saves the current analysis for reuse, where included in your subscription.

Available filter and grouping fields

Category	Fields
Service	Group; Number Dialled, Redirected To.
Routing	Feature Type; IVR Key Press, Label, Full Path Keys and Full Path Labels.
Caller	ID, Type, State, Locality, Postcode and Country Code.
Call	Distance and Outcome.
Destination	Number, Label, Type, Status, State, Locality, Postcode and Country Code.

12 Insights and reports

Built in insight	What it shows
Caller Locations	Calling patterns by state, locality and service number for the last 14 days.
Missed Calls	Calls whose outcome was not Completed during the last 14 days.
Slow Pickups	Calls with a ring duration of at least 12 seconds during the last 14 days.

Creating an insight

1. Use Explore Data to define the metric, filters, period and visualisation.

2. Select Create Insight.

3. Enter a clear name and review the saved filters and period.

4. Save the insight. Edit, duplicate or move visualisations as needed.

Creating a report

1. Open New Report and enter a report name.

2. Select Add Insight and choose a saved insight.

3. Add, duplicate and arrange the required visualisations.

4. Select Save Changes.

5. Use Download for a PDF or Schedule for recurring delivery.

Some saving, customisation and scheduling features require an Advanced Reporting subscription. Open Settings and Subscription for the current inclusions and price.

13 Invoices

The Invoices page summarises account costs and balances and provides PDF copies of completed invoices. Select Invoices from the portal navigation to open it.

Invoice Period	Issued Date	Due Date	Amount	Previous Balance	Closing Balance	Overdue Amount	
16/08/2026	Current	29/09/2026	Current	$2746.21	Current	Current	
16/07/2026	15/08/2026	02/09/2026	$1364.50	$1381.71	$2746.21	$1381.71	Download PDF
16/06/2026	15/07/2026	02/08/2026	$-531.33	$1913.04	$1381.71	$13.05	Download PDF
16/05/2026	15/06/2026	02/07/2026	$1331.72	$581.32	$1913.04	$581.32	Download PDF
16/04/2026	15/05/2026	02/06/2026	$-635.51	$1216.83	$581.32	$0.00	Download PDF
16/03/2026	15/04/2026	02/05/2026	$1412.68	$-195.85	$1216.83	$0.00	Download PDF
16/02/2026	15/03/2026	02/04/2026	$-3699.85	$3504.00	$-195.85	$0.00	Download PDF

Costs chart

The Costs by Type stacked chart shows how charges and adjustments change across invoice periods. Its colour legend identifies the account, reporting, service-fee and call-cost categories represented in the chart. Where supported, point to a chart period to view its values.

Invoice list

The invoice list contains the current billing period followed by completed invoice periods. The screenshot does not show a separate filter, search control or status column.

Column	What it shows
Invoice Period	The billing period associated with the row.
Issued Date	The date the invoice was generated. The open period displays Current.
Due Date	The date by which payment is due.
Amount	The net activity recorded for the period. A negative value may represent a payment, credit or adjustment.
Previous Balance	The balance carried forward before the period activity was applied. This operates as the opening balance.
Closing Balance	The resulting balance after the period activity was applied.
Overdue Amount	The portion of the account balance that is past its due date.
Download PDF	Downloads the completed invoice. This link is not displayed for the current period.

Invoice dates and payment status

The first row represents the current billing period. Current appears in place of its issued date, amount and closing balance because the period has not yet been finalised. Completed periods include issued and due dates, balance information and a Download PDF link.

An Overdue Amount of $0.00 means no amount is shown as overdue for that row.

An amount greater than $0.00 under Overdue Amount indicates a past-due balance.

A negative balance may indicate that the account is in credit.

Important: A $0.00 overdue amount does not necessarily mean that an invoice has been paid in full. An outstanding amount may not yet have reached its due date.

Balances credits and GST

Previous Balance is the opening balance carried into the period. Closing Balance is the account balance after applicable charges, payments, credits and adjustments have been applied. A positive closing balance generally represents an amount owing, while a negative balance may represent an account credit.

The invoice list does not show GST as a separate column. Open the invoice PDF to review its line items and confirm the GST, credits, payments and total due. Use the PDF description to identify what a negative amount represents.

Download an invoice PDF

1. Select Invoices from the portal navigation.

2. Find the required completed invoice period.

3. Select Download PDF on the right-hand side of that row.

4. The PDF will download or open in your browser, depending on your browser settings.

5. If it opens in the browser, use the browser download control to save a copy.

A PDF is not available for the row marked Current because that billing period has not yet been finalised.

Invoice delivery and Billing Email

Issued invoices are delivered to the Billing Email recorded under My Info. To check this address:

1. Select My Info from the portal navigation.

2. Locate the Billing Email field.

3. Confirm that the address is correct and that your business can access its inbox.

If the address needs to be changed, use the available update process under My Info or contact Teleca for assistance. A change may apply only to future invoice delivery and may not automatically resend earlier invoices.

Missing invoices

1. Check whether the required period is still marked Current. An invoice PDF is available only after the period is finalised.

2. Check whether the completed invoice appears in the portal list.

3. Check the inbox and spam or junk folders for the Billing Email recorded under My Info.

4. Use Download PDF to obtain another copy directly from the portal.

5. Contact Teleca if the invoice is absent from the portal or cannot be downloaded.

Incorrect invoice or account details

Review the account information under My Info. Update it through the portal where editing is available, or contact Teleca if an issued invoice needs to be corrected or reissued. Include the invoice period, the invoice number shown on the PDF and a description of the correction required.

Request another copy

The quickest way to obtain another copy is to select Download PDF beside the relevant invoice. If the invoice is unavailable or a reissued copy is required, contact Teleca and provide:

Account number and business name.

Required invoice period.

Invoice number, if known.

Preferred Billing Email.

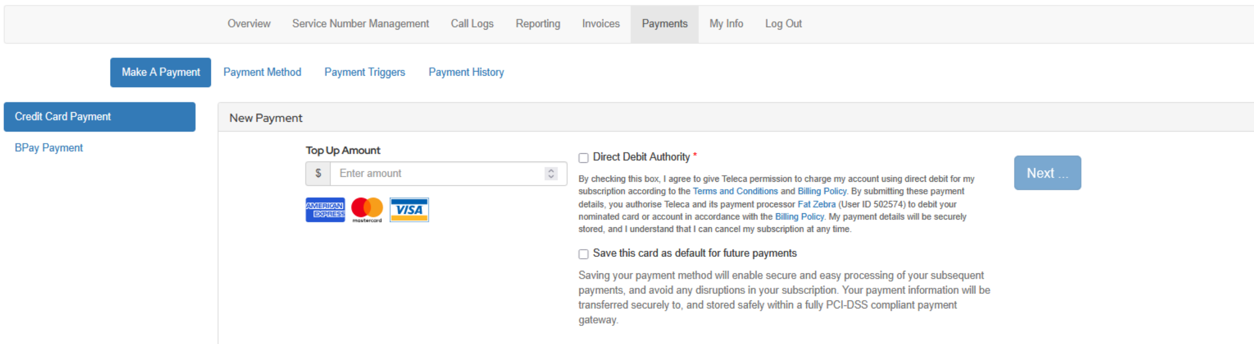
14 Payments

The Payments area lets you make a payment, manage a stored payment method, configure automatic prepaid top ups and review payment history. Select the relevant tab to continue.

Video tutorial: How to Make a Payment (42 seconds)

Make a payment

Select Make A Payment, then choose Credit Card Payment or BPAY Payment.



Credit Card Payment accepts a top-up amount and displays the authority and save-card options.

Pay by credit card

1. Select Credit Card Payment.

2. Enter the Top Up Amount.

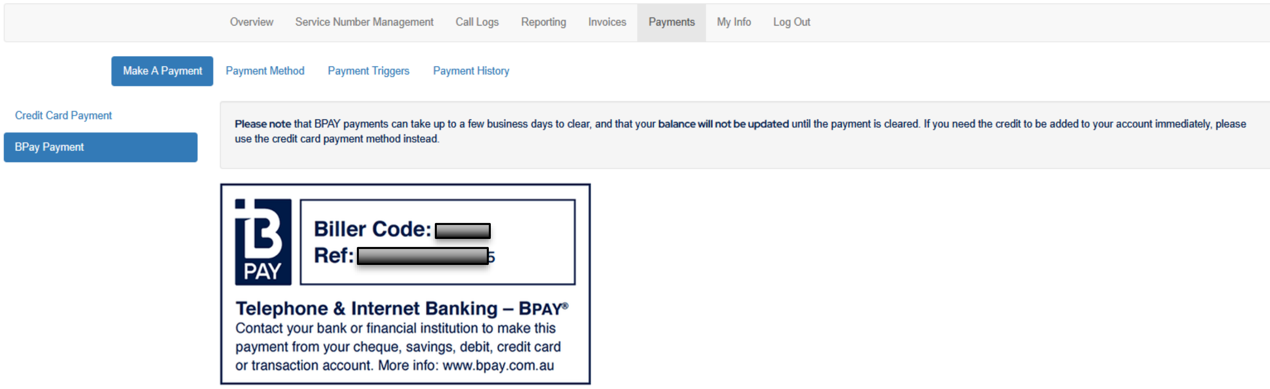
3. Read the Direct Debit Authority and select its checkbox if you agree.

4. To retain the card as the default for later payments, select Save this card as default for future payments.

5. Select Next and review the payment details before completing the payment.

The current screen displays American Express, Mastercard and Visa. It states that saved payment information is transferred securely and stored through a PCI DSS compliant payment gateway.

Pay by BPAY



BPAY Payment displays the account-specific biller code and reference required by the customer bank.

Use the biller code and reference displayed in your own portal when making a payment through your bank or financial institution. BPAY payments can take several business days to clear, and the portal balance is not updated until the payment clears. Use credit card payment if the account credit must be added immediately.

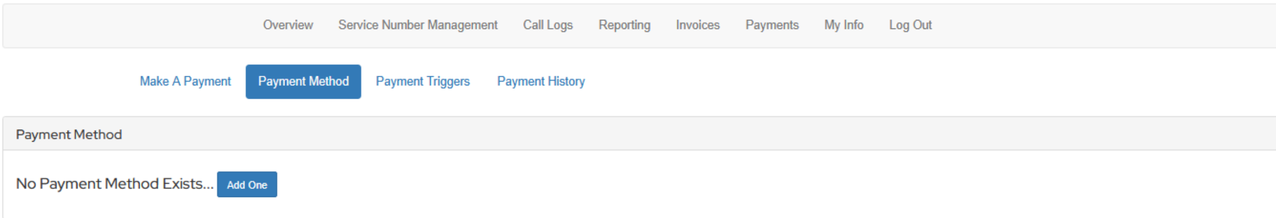
Security: Do not copy another customer's BPAY reference or rely on a reference shown in a guide. Always use the details displayed in your own signed-in portal.

Payment confirmation receipts and fees

Review the amount and payment method carefully on the confirmation step. After processing, check Payment History for the result. A Download PDF action appears for eligible cleared payments and can be used to obtain a payment record or receipt.

The supplied portal screens do not display a card fee, BPAY fee or receipt-delivery setting. Any applicable fee should be shown or confirmed before the customer authorises payment.

Payment Method



Payment Method when no saved payment method exists.

The Payment Method tab shows whether a reusable payment method is attached to the account. In the supplied screen, No Payment Method Exists is displayed with an Add One button.

Add a payment method

1. Select Payment Method.

2. Select Add One.

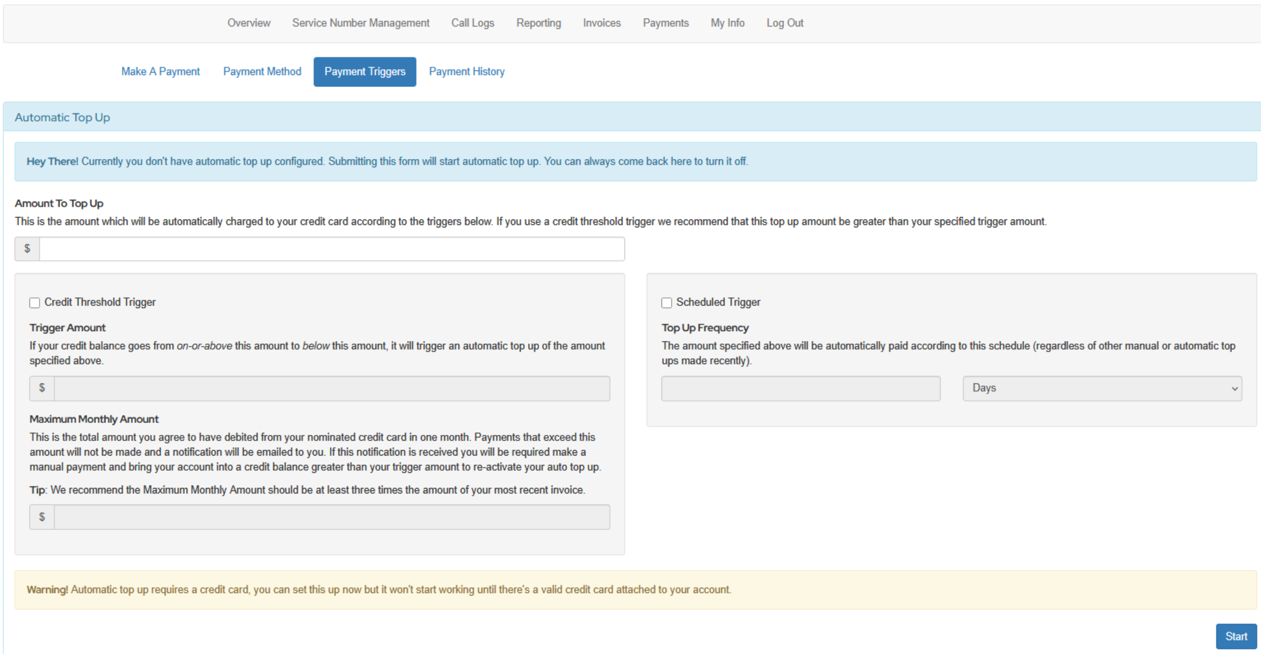
3. Enter the requested payment details in the secure payment form.

4. Review any authority or terms and complete the confirmation step.

When a payment method is stored, the portal will show only masked details, such as the card type and final digits. Full card numbers and security codes are never be displayed after saving.

Payment Triggers

Payment Triggers keep a prepaid account funded through automatic top ups. A valid stored credit card is required before automatic top up can operate.



Automatic Top Up settings for threshold-based and scheduled payments.

Top-up amount

Amount To Top Up is the amount charged to the stored credit card whenever an enabled trigger runs. For a Credit Threshold Trigger, the portal recommends setting this amount higher than the trigger amount.

Credit Threshold Trigger

Enable Credit Threshold Trigger to top up when the available credit moves from on or above the Trigger Amount to below it. Enter:

- Trigger Amount - the balance level that starts the top up.

- Maximum Monthly Amount - the most you authorise Teleca to debit from the nominated credit card in one month.

If a top up would exceed the Maximum Monthly Amount, the portal states that the payment will not be made and an email notification will be sent. Make a manual payment and restore the credit balance above the trigger amount to reactivate automatic top up. The portal recommends a monthly maximum of at least three times the most recent invoice amount.

Scheduled Trigger

Enable Scheduled Trigger to charge the Amount To Top Up on a repeating schedule. Enter the frequency value and select the time unit shown in the list. The supplied screen displays Days. Scheduled top ups operate according to the selected schedule regardless of recent manual or automatic top ups.

Start or stop automatic top up

1. Enter Amount To Top Up.

2. Enable Credit Threshold Trigger, Scheduled Trigger or both, then complete the required fields.

3. Confirm that a valid credit card is attached to the account.

4. Select Start.

The screen states that automatic top up can later be turned off by returning to Payment Triggers. Confirm the settings carefully because enabling a trigger authorises future charges to the stored card.

Failed or blocked top ups

If a payment is declined, review Payment History and confirm that the stored card remains valid. Make a manual payment if needed to keep the prepaid balance available. A threshold top up blocked by the monthly maximum requires a manual payment that restores the balance above the trigger amount before automatic top up can reactivate.

The supplied screens do not state how many retry attempts occur after a declined payment, whether a failed attempt disables the trigger, or when services may be affected. Follow any portal or email notification and contact Teleca promptly if the account remains unfunded.

Payment History

Payment History lists attempted and completed account payments. The screenshot containing transaction identifiers has intentionally been omitted from this guide.

Column	What it shows
ID	The payment or transaction identifier.
Amount	The value of the payment attempt.
Payment Type	The payment channel. Visible examples include Credit Card and BPAY.
Trigger	How the payment originated. Visible examples include Top Up and External Payment.
Created Date	When the payment record was created.
Processed Date	When processing was recorded.
Payment Result	The result of the attempt. Visible examples include Cleared and Declined.
Download PDF	Downloads a PDF record for eligible cleared payments.

No search, date filter or export control is visible in the supplied Payment History screen. Download PDF appears at row level rather than as a whole-history export, and is not shown beside the visible declined transactions.

Payment security

- Enter payment details only in the secure Teleca portal.

- Never email a full card number, card security code, bank-account login or online-banking password.

- Teleca may ask for a payment ID, amount, date or the final digits of a card to investigate a payment, but customers should not send full card or bank details.

- Check that the account-specific BPAY reference belongs to your own account before submitting payment.

- Sign out after using the portal on a shared device and store downloaded receipts securely.

15 My Info

Account Details

Account Details contains your contact, email-delivery and address information. Select Save Changes after checking all updated fields.

Video tutorial: How to Update Your Details (56 seconds)

Section	Information available
Business details	Name, Business Name, ABN, Email Address, Primary Contact, Fax Number, Mobile Number and Change Password.
Email delivery	Billing Email for invoices and up to two Backup Email addresses for copies of account communications.
Physical address	Address lines, suburb or town, postcode and state.
Postal address	Address lines, suburb or town, postcode and state.

Business Name and ABN may be locked. Contact Teleca if legal business details need to be changed and cannot be edited in the portal.

Notifications

- Receive an email when your balance falls below a chosen Critical Balance amount.
- Receive regular credit-balance notifications every 1 to 12 days, weeks or months.
- For weekly notifications, choose a day of week. For monthly notifications, choose a day from the 1st to the 28th.

- Choose the notification hour and AM or PM, and optionally send only when the balance is critical.

16 Getting help

Before contacting Teleca, note the portal area, service number if relevant, date and time, and the exact message shown. A screenshot can help, but remove your Support PIN, password, account identifiers, caller details, addresses and payment information before sharing it.

General Enquiries: 1300 95 55 33

17 Glossary

Term	Meaning
Answer Point	A destination phone number used in a routing configuration.
CLID	Caller Line Identification, or the caller ID presented to the person answering.
IVR	Interactive Voice Response, allowing callers to choose a route with keypad input.
Overflow	The next route used if a call is not answered within a timeout.
Ring Duration	The time a destination rang before answer or termination.
Routing Template	A reusable routing configuration that can be applied to services.
Service Group	A label used to organise services and reporting.
Whisper	Audio heard by the person answering before the caller is connected.
Voice to Email	An unanswered voice message delivered to a configured email destination.