



Prepaid Services Configuration Manual



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1. Make Prepaid Services available

Prepaid Services can be made available in the context menu of a branch, or as a tab on the branch card itself. Using both options is also possible.

1.1 Prepaid Services in the context menu of a branch

Go to Modules > Action Management > Action Explorer > **Call management**.

1. Click the 'Create' button
2. Select 'HTTP action'
3. Select 'Call management - First line call' or 'Call management - Second line call', depending on where you want to show the Prepaid Services option.
4. Decide on a name for the action, for example 'Open Prepaid Services card', and save it
5. In the column on the left, tick the following options:
 - a. Under 'Available', tick 'Active' and 'Apply in the Operator's Section'.
 - b. Edit the option 'Available in context menu' and select 'context menu branch'
6. On the 'Action' tab, select the following options:
 - a. For 'Server', select 'This TOPdesk'
 - b. For 'Path', enter the following:

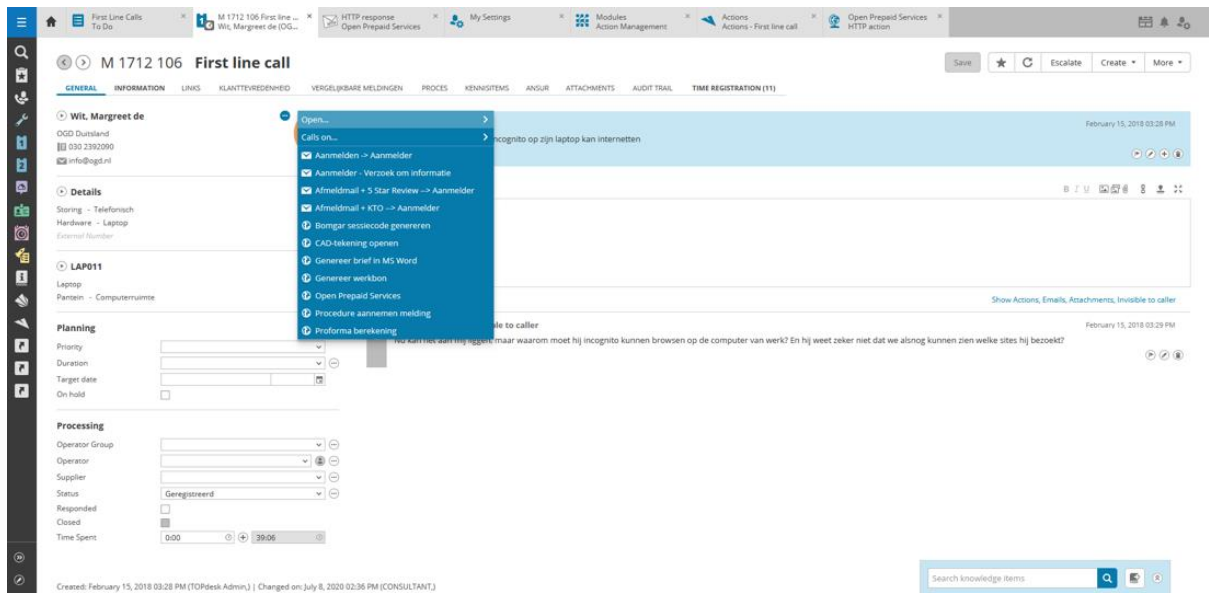
`/services/prepaid-services/[Caller_(Registered).Branch.-UNID-]?showTitle=true`

7. On the 'Additional' tab, select the following options:
 - a. Untick 'Confirm before sending (Operator's Section only)'
 - b. Tick 'Show action in TOPdesk'

The screenshot shows the 'HTTP action' configuration page for 'Open Prepaid Services'. The interface is divided into several sections:

- Name:** Open Prepaid Services
- Available:** Active, Apply in the Self-Service Portal, Apply in the Operator's Section
- Available in context menu:** Context menu branch
- Available on extra tab:** Display URL on Extra Tab
- Description:** (Empty text area)
- Server:** This TOPdesk, External server (with Port 80)
- Path:** /services/prepaid-services/[Caller_(Registered).Branch.-UNID-]?showTitle=true
- Advanced options:** HTTP Method: GET, HTTP Version: HTTP/1.1
- Headers:** (Empty text area)

After saving the HTTP action, it will be visible on the call card, in the context menu of the branch:



1.2 Prepaid Services as a tab on the Branch card

Go to Modules > Action Management > Action Explorer > **Property Management**

Or, if Property Management is not available: Supporting Files

1. Click the 'Create' button
2. Select 'HTTP action'
3. Select 'Property Management - Branch'
4. Decide on a name for the action, for example 'Prepaid Services', and save it
5. In the column on the left, select the following options:
 - a. Under 'Available', select 'Active' and 'Apply in the Operator's Section'
 - b. Under 'Available on extra tab' tick the option 'Display URL on Extra Tab'
6. On the 'Action' tab, select the following options:
 - a. For 'Server', select 'This TOPdesk'
 - b. For 'Path', enter the following:

/services/prepaid-services/[-UNID-]

7. On the 'Additional' tab, select the following options:
 - a. Untick 'Confirm before sending (Operator's Section only)'
 - b. Tick 'Show action in TOPdesk'

HTTP action **Prepaid Services** Save ↻ Create Delete

Branch

Name:

Available

- Active
- Apply in the Self-Service Portal
- Apply in the Operator's Section

Linked events

Available in context menu ⓘ

Available on extra tab ⓘ

- Display URL on Extra Tab

Description

ACTION **ADDITIONAL**

Server

- This TOPdesk
- External server Port: 80

Path Insert fieldlist

`/services/prepaid-services-{UNID-}`

Advanced options

HTTP Method:

HTTP Version:

Headers Insert fieldlist

After saving the HTTP Action, the Prepaid Services option is available as a tab on the branch card.

Branch **OGD Duitsland** Save ↻ Create More

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61:55 / 1:00 **6192%** available Add balance

Date	Reference Number	Description	Caller	Status	Balance
July 8, 2020	M 1712 106		Wit, Margreet de	Geregistreerd	- 39:05
July 8, 2020	test reference				+ 1:00
July 7, 2020					+ 100:00

2. Configuration for first use

2.1 Log in

To make sure Prepaid Services is set up correctly, log in to prepaid services with an operator with sufficient permissions. The following permission are required for this:

- Login data: Write
- Operators: Create
- Permission groups: Create
- Permission groups: Write

Log into TOPdesk as an operator with these permissions. Go to the Prepaid Services the way you configured it:

- Open a call card, click on the context menu icon next to the branch field, and select the Prepaid Services action; or
- Open a branch card and go to the Prepaid Services tab.

If you log in with an operator without these permissions, a warning will be shown asking you to log in with an operator with these permissions. When you open Prepaid Services and see no warning of this kind, Prepaid Services are set up correctly.

2.2 Set up time registration

Prepaid Services works by means of time registration. Set this up as follows:

1. Go to **Settings > Module Settings > Call Management > Time Registration**
2. Tick the following options:
 - a. 'Use Time Registration'
 - b. 'Ask for reason'
3. Go to **Settings > Functional Settings > General Drop-down lists > Reason for time registration**
4. Click 'Add Reason for time registration'
5. Add a new option with the name 'Prepaid Services', then save.

All time registrations made with the reason 'prepaid services' will now be deducted from the customer's Prepaid Services balance.

This only works if the customer currently has a Prepaid Services account. To create a Prepaid Services debit account for a customer, go to the customer's Prepaid Services page (via tab or context menu) and select 'Create new Prepaid Services debit account'.