SIMUWAVE

Partner Guide

Everything you need to run your white-label phone company.

For partner administrators.

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Welcome

What this platform is, what white-label means, and what you can do here.

What this guide is

You're about to run a phone company. This guide walks you through everything the platform can do, with screenshots and click-by-click instructions. The first seven chapters — the **Quick Start** — get you to your first paying customer in about an hour. The rest is a reference you'll come back to as you grow.

What "white-label" means here

Your customers never see the platform's name. They see **yours**. Your logo at the top of their dashboard, your brand name in their billing emails, your support address on their invoices, and — if you set up a custom domain — your URL in their browser.

You handle the relationship. We handle the carriers, the SIP plumbing, the recordings, the redundancy, the porting workflows, and the parts of running a phone network that aren't fun.

How the layers fit together

The platform has three layers:

- **Platform** — us. We provide the infrastructure, the carriers, the dashboard you're using, and the phone numbers you can buy.
- **Partner** — that's you. You buy phone numbers in bulk, set your own pricing, brand the dashboard, and create accounts for your customers.
- **Tenants** — your customers. They're businesses with their own users, extensions, call flows, and phones. Each tenant lives in its own isolated account under your brand.

A tenant never sees other tenants. They never see the platform. They only see you.

What you'll be doing

Day to day, partners spend most of their time on three things:

1. **Onboarding new tenants** — taking a new customer from "I'd like a phone system" to "I'm taking calls" in 30-60 minutes.

2. **Managing phone numbers** — buying, porting, assigning, releasing, keeping E911 addresses current.

3. **Billing** — collecting payment from your tenants. The platform handles the heavy lifting (invoices, Stripe charges, automatic suspension on non-payment) so this should be the easiest part of your week.

Everything else — call routing, voicemail, queues, IVRs, desk phone provisioning, recordings — is configuration your tenants can do themselves. Your job is to get them set up and step out of the way.

How to read this guide

If this is your first time logging in, start with **Logging In & The Dashboard** next, then walk through the rest of the Quick Start in order. Total time: about an hour, including the Stripe Connect onboarding (which has waiting in it).

If you're back to look something up, jump to the Reference section using the table of contents on the left.

The Appendix at the end covers the parts of running a VoIP business that aren't software — pricing strategy, porting paperwork, E911 compliance, and a glossary.

> **A note on this guide itself:** when one of your tenants opens the help center inside *their* dashboard, they'll see your logo and your brand name in the chrome — not ours. The "How to White-Label This Guide" section in chapter 13 explains how that works. Yes, the help section white-labels itself.

QUICK START · CHAPTER 2

Logging In & The Dashboard

Get oriented in 60 seconds.

Signing in

Open your partner portal in a browser and click **Sign in**. Enter the email and password you used at signup. If you don't remember your password, click **Forgot password** below the login form — you'll get a reset link by email within a minute.

If you've never confirmed your email address, you'll land on a "Please verify your email" page after login. Check your inbox (and spam folder) for the verification email and click the link inside. You only need to do this once.

The dashboard at a glance

After login, you land on the **Dashboard**. This page is your control surface — the four cards at the top show your headline numbers (tenants, extensions, DIDs, system status) and the row below them adds active users and call minutes for the month.

If your account is still in trial, you'll see a banner across the top with a countdown. You can keep working normally during trial — the banner just reminds you to activate before it expires. We'll cover activation in *Account & Subscription*.

The three buttons at the bottom (Manage Tenants / View Analytics / Partner Settings) are shortcuts to the most common destinations. You can also reach them from the top navigation.

The top navigation

Every page on the platform shares the same top nav. There are five menus, each opens on hover or click:

- **Dashboard** — back to the landing page you just saw.
- **Tenants** — manage your customer accounts. Two items inside: *Tenants* (the list) and *Tenant Defaults* (settings applied to newly created tenants).
-

Numbers — phone number management. Three items inside: *Buy DIDs*, *DID Inventory*, and *Port Numbers In*.

- **Reports** — *Revenue Analytics* and *Tenant Invoices*.
- **Settings** — your account, your team, billing, branding, API keys, webhooks, and usage limits.

A **Help** link in the top nav opens the Help Center (this manual lives there).

In the top right, your initials open a small menu with your profile, a dark-mode toggle, and **Sign out**.

Mobile

The dashboard is fully usable on a phone or tablet. The top nav collapses into a hamburger menu, tables become horizontally scrollable, and modals go full-screen. You can do everything on mobile that you can do on desktop — including buying numbers and onboarding tenants.

Your Setup Checklist (the rocket icon, bottom-right)

The first time you sign in, a floating helper appears in the bottom-right corner of every dashboard page. It's a 6-step setup checklist designed to walk a brand-new partner from empty account to revenue-generating in one sitting.

The six steps:

1. **Create Your First Customer** — add a tenant
2. **Set Up Your Branding** — logo, colors, white-label
3. **Configure Billing** — connect Stripe to accept payments
4. **Get Your First Phone Number** — buy a local or toll-free DID
5. **Set Your Pricing** — create at least one billing profile
6. **Invite Team Members** — add staff users

Each item **auto-detects completion** based on real activity in your account — there are no checkboxes to tick manually. As soon as you create a tenant, complete Stripe Connect onboarding, etc., the item flips to a green check on your next page load.

Behavior

- **Brand-new partners** (0 of 6 complete) get the checklist **auto-expanded** as a card so the welcome moment is impossible to miss.
- Once you've made any progress, it collapses to a small rocket pill in the corner showing your progress (e.g. "3/6 done").
- Click the pill to expand it again. Click any row to jump straight to the page where that step gets done.
- The **`–` button** minimizes the expanded card back to the pill.
- The **` ` button** hides the helper for the current browser session. Closing the tab and coming back brings it back — this is intentional. We don't let you permanently lose the helper until you finish all 6.
- Once all 6 are complete, the helper **disappears entirely** and won't come back.

If you're a seasoned operator and don't want the helper at all, just hit whenever it pops up. It's not blocking anything.

What's next

Now that you can find your way around, let's create your first tenant.

Your First Tenant in 5 Minutes

Create your first customer account.

What a tenant is

A **tenant** is one of your customers — a business with its own phone numbers, extensions, users, voicemail, and call routing. Each tenant is fully isolated. Tenant A can't see Tenant B's data, calls, or settings.

You'll create one tenant per customer. A small business with three people is one tenant. A 200-person company with five departments is also one tenant — they manage their own internal structure inside the tenant.

Creating your first tenant

Click **Tenants** → **Tenants** in the top nav. You'll land on the tenants list. If this is your first one, you'll see an empty state with a **New Tenant** button in the top right.

Click **New Tenant**. A form appears with these fields:

Field	What to enter	Notes
Tenant Name	The customer's business name.	Shows up everywhere — invoices, dashboards, etc.
SIP Prefix	A short alphanumeric string (3-12 chars).	Auto-suggested from the name. Used internally to namespace SIP credentials. **Cannot be changed later.**
Billing Email	Where invoices and billing notifications go.	Usually the customer's accounting or admin contact.
Default CNAM	Caller ID name for outbound calls. Max 15 chars.	This is the name that displays on the receiving phone — like "ACME PLUMBING".
Timezone	Customer's local timezone.	Affects scheduled campaigns, call history timestamps, and analytics.
Status	TRIAL / ACTIVE / SUSPENDED / CANCELLED.	Set to TRIAL while you're getting them set up; flip to ACTIVE when they're paying.
E911 Address	Physical service address.	Required by law for emergency-services routing on at least one number per location. We'll cover this properly in the Phone Numbers chapter.

Click **Create**. The tenant appears in the list with their SIP prefix, status badge, and counts for users, DIDs, and extensions (all zero at this point).

What just happened

When you create a tenant, the platform spins up:

- An isolated account scoped to that tenant
- An empty SIP context for their extensions

- A billing record under your partner account
- A default voicemail context (used the first time someone enables voicemail)

Nothing is charged yet. You're not billed for an empty tenant. Charges start once the tenant has assigned DIDs or active extensions, depending on your billing model.

Managing the tenant

Click the tenant's name in the list to open their dashboard. **You're now seeing what your customer sees** — extensions, phone numbers, call flows, voicemail, all the day-to-day controls. Use this view to set up the basics for them, or hand it off and let them do it.

The breadcrumb at the top will always show "Tenants ’ [Tenant Name]" so you know which tenant you're inside. Click your brand logo at the top to go back to the partner dashboard.

What's next

Your tenant exists, but they don't have a phone number yet. Let's fix that.

Your First Phone Number

Search, buy, and assign a DID.

Phone numbers, in plain language

A **DID** (Direct Inward Dial) is a phone number that rings into your platform. When someone dials it from anywhere in the world, the call lands on our servers and gets routed wherever you've told it to go — an extension, a voicemail box, an auto-attendant, a call queue.

You buy DIDs from the platform. The platform buys them from carriers. You then assign DIDs to your tenants. A tenant can have one DID or hundreds.

Two flavors:

- **Local DIDs** — area-code-specific numbers like (501) 555-0123. Cheaper, ring-back rates apply. Used for most business lines.
- **Toll-free DIDs** — 800/833/844/855/866/877/888 numbers. More expensive, free for callers, no per-call inbound charge to the caller. Used for sales lines, customer support, anything you want callers to dial without thinking about cost.

Buying a local number

Click **Numbers** ’ **Buy DIDs** in the top nav. You'll land on the search page with the **Local Numbers** tab selected. Filter by **State** (required) and any combination of **Area Code**, **NXX** (the three digits after the area code), **Rate Center**, or **City**.

City is usually the easiest filter — start typing the city name and pick from the autocomplete. Click **Search**.

You'll get a results table showing available numbers, the rate center each one belongs to, and the monthly + setup pricing.

Tick the box on the number you want, then click **Purchase Selected**. A confirmation modal appears showing the total cost (monthly + one-time setup fee).

Click **Confirm Purchase**. The cost is deducted from your wallet (or charged to your card if your wallet is empty and auto-recharge is on).

> The number is yours within seconds. It's already provisioned with the carrier and ready to receive calls.

Buying a toll-free number

Same flow, but click the **Toll-Free** tab on the search page. Two options:

- **Regular** — pick from a list of available numbers. Set quantity (usually 10) and click search.
- **Vanity** — search for a specific pattern. Use `X` as a wildcard, so `877-555-XXXX` looks for any 877-555 number.

Toll-free pricing is higher — typically $2.50/mo wholesale plus a setup fee, and per-minute charges apply on inbound. Worth it for sales/support lines, overkill for an internal extension.

Assigning the DID to a tenant

Click **Numbers** › **DID Inventory** in the top nav. The number you just bought is in the list, marked **Unassigned**.

Click the **Assign** action on the row. A modal appears with a dropdown of your tenants.

Pick your tenant. Click **Assign**. Done. The number now belongs to that tenant — they'll see it in *their* DIDs page.

The DID isn't routed to anything yet. Calls to it will follow the tenant's default unassigned-DID behavior (configurable in their settings, defaults to a polite "this number isn't configured" message). You'll route it to something real — an extension, an auto-attendant, a queue — when you set up call flows for them. Or they'll do it themselves.

CNAM and E911 — set them now or later

Two things every DID needs eventually:

- **CNAM** (Caller ID Name) — the name displayed on the *receiving* phone when you call out from this number. Set this on the DID itself or let it inherit from the tenant's default CNAM. Carriers

cache CNAM nationally for ~24h, so don't expect your changes to show up immediately on every receiving phone.

- **E911 Address** — the physical street address where this number is "located", for 911 dispatch routing. Required by US federal law (Kari's Law and Ray Baum's Act) for at least one number per physical location. We'll go deep on this in the Phone Numbers chapter — for now, just know it exists and that you can set it from the same Edit DID modal.

What's next

Your tenant has a phone number. Now let's make sure you can get paid when they use it.

QUICK START · CHAPTER 5

Getting Paid: Connect Stripe

Three modes, recommended path, going live.

How payments work — the short version

You bill your tenants. We bill you. Two separate flows.

For **us billing you**: there's a wallet on your partner account. Top it up by credit card. Monthly platform fees, DID monthly costs, and per-minute usage all draw down from this wallet automatically. If the wallet runs low and you have auto-recharge on, your card is charged to top it back up.

For **you billing your tenants**: there are three modes. Pick one.

The three Stripe modes

Mode	How it works	When to use it
Platform (default, no setup)	Tenants pay our Stripe account. We send you the money manually (configurable schedule).	Fastest to start. No Stripe account needed on your side. Good for testing or while you wait for Stripe Connect approval.
Connect (Express)	You complete a 5-minute Stripe-hosted onboarding. Tenants pay charges land in *your* Stripe account directly. We take a 3.99% application fee, you keep the rest.	**Recommended.** Money goes straight to you. Stripe handles disputes/refunds. The onboarding is genuinely 5 minutes if you have your business info handy.
Custom Keys	You provide your own existing Stripe `sk_live_...` key. We charge through it as if it were ours.	Advanced. Use only if you already have a complex Stripe setup you don't want to touch (e.g., custom subscriptions, products, webhooks already in place).

For 95% of partners, the answer is **Connect**. The rest of this chapter walks you through that path.

Setting up Stripe Connect

Click **Settings** ’**Billing** in the top nav. Click the **Tenant Billing** tab on the billing page.

You'll see a card explaining the three modes. Click **Connect with Stripe**.

A new browser tab opens to Stripe's hosted onboarding. You'll be asked for:

- **Business type** — Individual / Sole Prop / LLC / Corporation
- **EIN or SSN** — for tax reporting
- **Business address** and contact info
- **Business website** (your portal URL is fine)
- **Bank account** — where you want payouts to land
- **Identity verification** — usually a photo of your ID; sometimes asks for a selfie

Stripe processes the application in under a minute for most US-based individuals and businesses. Some applications need manual review (24-48 hours).

When you're done, Stripe redirects you back to the platform. The Tenant Billing tab now shows **Stripe Connect Active** with a green badge.

The statement descriptor

This is the text that shows up on your customer's credit card statement when you charge them. Default is the generic platform name — change it to *your* brand so customers recognize the charge.

Maximum 22 characters. No special punctuation. Examples: `ACME PHONES`, `HRC TELECOM`, `PINEDALE VOIP`.

> Get this right. The #1 reason for chargebacks on phone-service charges is "I don't recognize this on my statement." Use a name customers will identify even at a glance.

Click **Save Descriptor**.

Verifying it works

Best test: create a fake tenant, add a $1 invoice, charge a card you own. The charge should land in *your* Stripe dashboard within a minute, and the descriptor on your card statement should match what you set.

You can do this in test mode if you've added your Stripe test keys, or live mode with a real $1.00 charge that you immediately refund. Either is fine.

What's next

Your money plumbing works. Now let's make the dashboard look like *yours*, not ours.

QUICK START · CHAPTER 6

Brand Your Portal

Logo, colors, name — about 5 minutes.

Why this matters

Your customers shouldn't see the platform's name. They should see yours. This chapter takes about 5 minutes and changes the dashboard, the login screen, the invoice headers, and the email senders to match your brand.

Upload your logo

Click **Settings** in the top nav, then click the **Branding** tab.

Drop your logo onto the **Logo** upload field, or click **Browse**. Use a square or wide horizontal logo — we'll display it at about 32 pixels tall, so test that it's still readable at that size. SVG is best (scales perfectly), PNG is fine, JPG works but won't have a transparent background.

After upload, you'll see a preview of the logo in place.

Set your brand color

The **Primary Color** picker controls the accent color throughout the dashboard — buttons, links, the active-page indicator in the navigation, badges. Pick a color that contrasts well against white and a darker version that contrasts against light gray.

If you have a brand style guide, paste your hex code directly into the input.

Brand text

Three text fields shape what your customers see:

- **Brand Name** — appears in the dashboard header, invoice headers, and email signatures. Defaults to the company name on your account.
- **Brand From Email** — the "from" address on emails sent to your customers (invoices, payment receipts, alerts). Use a noreply address you control, like `noreply@yourbrand.com`.

- **Brand Support Email** — where customers go for help. Shows on invoices and in error messages. Use whatever inbox you actively monitor.

Click **Save**.

See it in action

Refresh any dashboard page. Your logo is now in the top-left corner; your brand name is next to it; your primary color is on every button.

What's next — and what's *also* next

You've got a working brand. The Quick Start is almost done — one more chapter (the Going Live Checklist) and you're ready to take real customers.

If you want to take this further with a custom domain (e.g., `phones.yourbrand.com` instead of `yourbrand.simuwave.com`), see *White-Label Your Tenants* in the Reference section. It covers DNS setup, SSL provisioning, and what your tenants see end to end.

Going Live Checklist

Print this before your first real customer.

Before your first paying customer

Print this page. Walk through it once. You'll catch the things you missed during setup.

Account

- Email address is verified
- Strong password set
- At least one other person on your team has admin access (in case you lose your phone or get locked out)
- Trial converted to active subscription, or a credit card is on file with auto-recharge enabled

Payments

- Stripe Connect onboarding complete (green "Active" badge on the Tenant Billing tab)
- Statement descriptor set to a name your customers will recognize
- Test charge of $1 has landed in your Stripe dashboard
- Bank account on file, payouts enabled

Branding

- Logo uploaded and visible in the top-left of every dashboard page
- Primary color set to your brand color
- Brand name set

- Brand "from" email set to an address you control
- Brand support email set to an inbox you actively monitor
- (Optional) Custom domain configured and showing the green "Active" status

Phone Numbers

- You've bought at least one DID end-to-end (so you've seen the flow)
- You've assigned at least one DID to a tenant (so you've seen that flow too)
- CNAM set on at least one DID
- E911 address set on at least one DID per physical location *(this is a legal requirement)*

Tenants

- You've created at least one test tenant
- You can navigate into the tenant's dashboard and back out
- Tenant defaults are set to sensible values for the kinds of customers you're targeting
- You've reviewed the *Usage Limits* page and decided what caps to set on new tenants

Operations

- You know where to find tenant invoices (Reports ’ Tenant Invoices)
- You know how to top up your wallet (Settings ’ Billing ’ Subscription tab ’ Top Up)
- You've enabled auto-recharge so your service doesn't interrupt mid-month
- You've created at least one API key with no scopes you don't need *(if you plan to use the API)*
- You've set up at least one webhook endpoint *(if you plan to integrate)*

Support — yours and ours

- You have a support email or ticket system ready for *your* customers
- You know how to file a support ticket with us (Support menu)
- You've subscribed to status updates at status.simuwave.com

When every box is ticked, you're ready. Take that first call.

REFERENCE · CHAPTER 8

Account & Subscription

Trial, tiers, plan changes, wallet, auto-recharge, payment methods.

Where this lives

Click **Settings** ’ **Billing** in the top nav. The page has four tabs:

- **Subscription** — your platform plan and current usage
- **Payment Methods** — saved cards, auto-recharge
- **History** — every wallet transaction
- **Tenant Billing** — your Stripe Connect setup (covered in *Tenant Billing & Stripe*)

The first three are about *us billing you*. This chapter covers all of them.

Trial ’ Active

Every new partner account starts in TRIAL state for 14 days. During trial:

- You can do everything the platform supports
- You won't be charged
- A countdown banner appears at the top of every page
- Your trial-end date is shown on the Subscription tab

To activate, click **Activate Account** on the Subscription tab. You'll need a payment method on file (see *Payment Methods* below). On activation, your card is charged for the first month's platform fee plus a small initial wallet credit, prorated based on the time left in the current calendar month.

If you don't activate before trial ends, the account is suspended. Suspended accounts can't take inbound calls or place outbound calls. You can reactivate by adding a payment method and clicking **Activate Account** at any time.

The four platform tiers

Tier	$/mo	Max Extensions	Per-Ext	DID /mo (Local / TF)	Local /min	Toll-Free /min
Starter	$249	300	$3.00	$1.75 / $2.50	$0.020	$0.022
Professional	$549	1,000	$2.00	$1.50 / $2.25	$0.016	$0.019
Business	$999	unlimited	$1.25	$1.25 / $2.00	$0.014	$0.017
Enterprise	custom	unlimited	custom	custom	custom	custom

The **monthly fee** is your subscription. It covers platform access, support, and infrastructure.

The **per-unit rates** are what we charge you on top of the subscription, based on what your tenants actually use:

- **Per-extension** — billed monthly per extension your tenants have provisioned, regardless of usage
- **DID monthly rate** — billed per phone number assigned to a tenant; **local and toll-free DIDs are priced separately** (toll-free is more expensive everywhere because the receiving party pays the carrier fee, not the caller)
- **Per-minute** — billed for actual call time (inbound + outbound). **Local and toll-free traffic is metered and rated separately**. Toll-free minutes carry a higher per-minute rate on every tier because the upstream carrier surcharges toll-free termination.

You then mark these up and bill your tenants whatever you like. The difference is your margin. Most partners run a 2-5x markup on per-minute and 50-100% on extensions/DIDs.

Why local vs. toll-free is split out

Voice carriers charge us different wholesale rates for local termination vs. toll-free termination, and the gap is not small. Showing them as one blended "per-minute" number would either short-change you on toll-free-heavy tenants or pad the rate for local-only ones. We pass through the distinction so your margin math stays honest.

Rate changes (Terms of Service §6.5)

Per **Terms of Service section 6.5**, upstream carrier pricing can change at any time without prior notice. When that happens, we update the platform rates prospectively — meaning new charges metered after the change use the new rate, but anything already billed stands. We post any rate change at least 30 days in advance on the Subscription tab and email your billing contact. If you can't accept a change, you can downgrade or cancel before it takes effect.

Changing your plan

On the Subscription tab, click **Change Plan**. You'll see all three tiers as cards (Enterprise hides behind a "Contact Sales" link). Pick one, click **Confirm**.

A summary modal appears showing:

- New monthly fee
- Prorated charge for the rest of this month
- Amount to be charged immediately

Click **Confirm**. The change is instant — your new rates apply going forward.

Upgrades are charged immediately (prorated). **Downgrades** take effect at the end of the current billing cycle so you're not refunded for the current month.

> If you're at the extension cap on Starter and trying to add an 301st extension, you'll get a friendly upgrade prompt instead of a hard error.

The wallet

Your wallet holds prepaid credit. All usage charges (extension monthly, DID monthly, per-minute local, per-minute toll-free) draw from the wallet. Your platform subscription fee is charged separately to your card on the same day each month.

Why a wallet instead of just billing your card monthly? Two reasons:

1. **Predictability** — you know how much you've prepaid. No surprise bills.

2. **Resilience** — if your card expires or is declined, your service keeps running until the wallet hits zero. We email you well before that happens.

The wallet balance is visible at the top of the Subscription tab. Click **Top Up Wallet** to add funds. You'll be charged immediately and the balance updates within seconds.

Auto-recharge

Set this once and forget the wallet exists. Click the **Payment Methods** tab. Find the **Auto-Recharge** card.

- **Enable auto-recharge** when balance falls below `$X` — recommend $50 for small operations, $500+ for larger
- **Recharge amount** — how much to add each time the threshold trips. Recommend 4-6 weeks of typical usage so you're not getting recharged daily.

Auto-recharge fires at most once per hour. If a recharge fails (card declined, etc.), we email you immediately and disable auto-recharge until you fix it. Service continues until your wallet hits zero.

Payment methods

The Payment Methods tab shows all saved cards. Click **Add Payment Method** to attach a new one. We use Stripe Elements — your card data never touches our servers, only Stripe's.

Designate one card as **Default**. The default card is used for:

- Platform subscription monthly charge
- Wallet top-ups
- Auto-recharge

Delete a card by clicking the trash icon. If you delete the only card on file, auto-recharge is automatically disabled (otherwise we'd have nothing to charge).

ACH/bank account is supported but takes a few days to verify with Stripe — useful for higher-volume partners who want to avoid card processing fees.

Transaction history

The History tab is a complete ledger of every wallet credit and debit. Filter by date range and type (top-up, monthly DID, monthly extension, per-minute local usage, per-minute toll-free usage, refund, manual adjustment).

Export to CSV via the button in the top right. Useful at year-end for accounting.

Subscription invoices

Every monthly platform fee charge generates an invoice. Find them under the History tab — they're flagged as `subscription_invoice` and have PDFs attached. Download for accounting/tax purposes.

REFERENCE · CHAPTER 9

Managing Tenants

Create, edit, statuses, deletion, managing as the tenant.

The tenant lifecycle

Every tenant moves through these statuses:

Status	What it means	What works
TRIAL	New tenant, not yet a paying customer	Everything works. Calls flow. No charges to the tenant yet.
ACTIVE	Paying customer	Everything works. Tenant is being billed per their subscription.
SUSPENDED	Past due or manually suspended	No calls. No new extensions. Tenant sees a "service suspended" page.
CANCELLED	Permanently closed	Read-only. Tenant data preserved for 90 days, then purged.

You set the status when you create the tenant. You change it from the tenant edit modal or via the API.

The tenants list

Click **Tenants** ’ **Tenants** in the top nav. Columns:

- **Name** — clickable, opens the tenant's dashboard
- **SIP Prefix** — internal identifier, never changes
- **Status** — color-coded badge
- **Users** — how many user accounts exist in this tenant
- **DIDs** — assigned phone numbers

- **Extensions** — provisioned extensions
- **Created** — when you made the tenant
- **Actions** — Edit, Manage, Delete

Search the list by typing the tenant name or billing email in the search box. Click any column header to sort.

Editing a tenant

Click **Edit** on the row. The same modal you used to create the tenant appears, with all fields editable except **SIP Prefix** (immutable — changing it would break every existing extension).

You can change:

- Name
- Billing email
- Default CNAM (caller ID name on outbound)
- Timezone
- Status
- E911 address fields

Changes save immediately. No restart needed — the tenant's calls are unaffected.

Tenant defaults

Click **Tenants** → **Tenant Defaults** in the top nav. This page sets the values that get pre-populated when you create a *new* tenant — saves typing if you've got common patterns.

Useful defaults to set:

- **Timezone** — your local one if you're mostly serving local businesses

- **Default CNAM** — if you white-label, leaving this blank is fine; tenant sets their own
- **Suspension behavior** — what happens when a tenant exceeds their spend cap
- **Default billing profile** — assigns one of your billing templates to new tenants automatically

Defaults only apply to *new* tenants. Existing tenants keep their current settings.

Managing as the tenant

Click the tenant name in the list to open *their* dashboard. You're now seeing what your customer sees: extensions, DIDs, call flows, voicemail, the works.

The breadcrumb at the top always says "Tenants ’ [Tenant Name]" so you know which tenant you're inside. Click your brand name in the header to go back to the partner dashboard.

You can do anything the tenant can do — provision phones for them, set up call flows, configure voicemail. This is how onboarding works in practice: you do the initial setup for them, then hand them a username and password and walk away.

> Anything you do as the tenant is logged with your user ID, so the audit trail shows it was you, not them. Useful for support cases.

Deleting a tenant

Click **Delete** on the row. A confirmation modal asks you to type the tenant name. This is intentional friction — deleting is destructive.

What deletion actually does:

1. Tenant status flips to CANCELLED
2. All extensions unregister
3. All DIDs are released back to your inventory (you can reassign them to another tenant)
4. Active recordings are finalized; nothing new is recorded
5. After **90 days**, all tenant data is permanently purged (call recordings, transcripts, voicemail, contacts, etc.)

During the 90-day window, you can re-activate the tenant from the SUSPENDED list. After 90 days, the data is gone.

> If a tenant is deleting because they're switching providers, **port their numbers out before deleting**. Once a DID is released back to your inventory, the porting workflow gets complicated. Better to handle the port first, then delete.

Suspending and reactivating

Manual suspension: edit the tenant, change status to SUSPENDED, save. Inbound calls go to a "service interrupted" message. Outbound is blocked. The tenant sees a billing-suspension page when they log in.

Reactivation: edit, change status back to ACTIVE.

You can also configure **auto-suspension** based on spending caps — covered in *Usage Limits & Spending Controls*.

What you can't change

- **SIP Prefix** — immutable
- **Created date** — immutable
- **Linked partner** — you can't transfer a tenant to a different partner. Tenants are owned by whoever created them.

If a tenant needs to move to a different partner (e.g., M&A scenarios), open a support ticket and we'll handle it manually.

REFERENCE · CHAPTER 10

Phone Numbers (DIDs)

Local, toll-free, vanity, CNAM, E911, releasing, porting in.

Where DID work happens

Three pages under the **Numbers** menu:

- **Buy DIDs** — search and purchase new numbers
- **DID Inventory** — manage everything you own
- **Port Numbers In** — bring existing numbers from another carrier

Buying local numbers

Numbers ’**Buy DIDs**, **Local Numbers** tab. Search by combinations of:

- **State** (required) — the only mandatory filter
- **Area Code** — three-digit prefix (e.g., 501)
- **NXX** — middle three digits (e.g., 555)
- **Rate Center** — the geographic exchange a number is "located" in. Affects E911 routing and inter-state vs intra-state pricing.
- **City** — the easiest filter. Autocomplete-driven.

Results show:

- Phone number (formatted)
- Region (state, often city)
- Rate center
- Monthly cost (your wholesale rate)

- One-time setup fee ($1.00 typically)
- Per-minute rate

Tick boxes on the numbers you want. Click **Purchase Selected**. Confirm. The numbers are yours within seconds.

Buying toll-free numbers

Numbers ’**Buy DIDs**, **Toll-Free** tab. Two modes:

Regular — pick from a list of available numbers. Set how many to show (default 10). Click search. Pick from the results.

Vanity — search for a specific pattern. Use `X` as a wildcard:

- `877-555-XXXX` — any 877-555 number
- `8XX-OUR-FOOD` — any toll-free where the last 7 digits spell OUR-FOOD
- `888-XXX-1000` — any 888 ending in 1000

Vanity searches can return slowly (the system is brute-forcing through carrier inventory). Be patient.

Toll-free pricing:

- Higher monthly ($2.50 wholesale typically)
- Higher per-minute (you pay for inbound *and* outbound)
- $1 setup fee

Worth it for sales/support lines where customers shouldn't think about call cost. Overkill for an internal extension.

Inventory management

Numbers ’**DID Inventory**. Every number you own is here, with these columns:

- Phone number

- Tenant (assigned to, or "Unassigned")
- Status (ACTIVE, RELEASED, PENDING)
- Call Flow (if routed to one)
- CNAM (caller ID name)
- E911 Status (registered / not set / pending)
- Actions

Filter by tenant, search by number or tenant name, filter by E911 status. The default view shows everything.

Three statuses

- **ACTIVE** — fully provisioned, taking calls, billing monthly
- **PENDING** — purchased but not fully provisioned at the carrier yet (rare; usually clears within 60 seconds)
- **RELEASED** — was assigned to a tenant who deleted; in your inventory but not yet reassigned

Assigning to a tenant

Click **Assign** on an unassigned row. Pick a tenant from the dropdown. Click **Assign**.

The DID is now visible to that tenant in *their* DIDs page. They can route it to a call flow, an extension, a queue, or whatever. Until they route it, calls follow their **Unassigned DID Behavior** setting (covered in tenant settings).

CNAM (caller ID name)

CNAM is the name that displays on the *receiving* phone when you call out from this number. "ACME PLUMBING" instead of just a number.

Two levels:

1. **Tenant default** — set in the tenant's settings page; applies to all of their DIDs unless overridden

2. **Per-DID override** — set in the DID's edit modal; takes precedence over the tenant default

Click **Edit** on the DID, fill in the CNAM field (max 15 characters), save. The change is queued for sync to the national CNAM database.

> **Important:** CNAM changes can take **24-48 hours** to propagate. Carriers cache CNAM nationally. Don't expect your tenant to see the new name immediately when calling their cell phone.

The CNAM column in the DID Inventory shows sync status:

- **Synced** — change is live with carriers
- **Pending** — submitted, waiting for confirmation
- **Failed** — sync failed (rare; usually a CNAM that violates carrier rules — too long, special characters, profanity)

E911 — the legal requirement

US federal law requires that every phone number capable of dialing 911 has a registered service address that 911 dispatchers can use to route emergency calls. Two laws:

- **Kari's Law** — all multi-line phone systems must allow direct 911 dialing without prefix codes (we handle this automatically in our dialplan)
- **Ray Baum's Act** — every number needs a "dispatchable location" — a physical street address, often including building/floor/suite

What this means in practice: **every DID needs an E911 address**. Set it on the DID edit modal:

- Street address
- City
- State
- ZIP
- Country (defaults to US)

For tenants with multiple physical locations: each location's DIDs need that location's address. The "Apply to all DIDs for this tenant" checkbox in the modal is a shortcut when all DIDs share one address.

The E911 Status column shows:

- **Registered** — address is on file with the 911 provider
- **Not Set** — no address; 911 calls will fail
- **Pending** — submitted, waiting for confirmation (usually < 1 hour)
- **Failed** — address didn't validate; needs correction

> **You can lose a DID for not registering E911.** The platform won't let your tenant make a 911 call from a non-registered number, and continued non-compliance can get the number suspended. Don't ship DIDs without E911 addresses.

Releasing a DID

Click **Release** on a DID's row. Confirm in the modal. The DID is unassigned from the tenant, the monthly charge stops, and the number returns to your inventory (you can reassign it).

If the tenant doesn't need it permanently, release. If you want to keep the number for the tenant but they're temporarily not using it, just leave it assigned — the DID monthly charge still applies, but it's there if they come back.

Permanently releasing a DID back to the carrier

If you want to delete a number entirely (stop paying for it forever), open a support ticket. We don't expose a "delete DID" button in the UI because the action is irreversible — once a DID goes back to the carrier pool, you may not be able to get it back even if you immediately want it. Better to handle through support.

Porting numbers in

Numbers ’**Port Numbers In**. This is a multi-step workflow that takes 5-30 days end-to-end.

The short version:

1. Create a new port request. Enter the number(s) being ported, the current carrier, and the customer's account info.
2. Upload a signed Letter of Authorization (LOA) from the customer.
3. We submit to the carrier on your behalf.
4. Carrier acknowledges (1-3 business days).
5. Carrier provides a Firm Order Commit (FOC) date — the date when the number will actually move.
6. On FOC date, the number flips. Calls stop hitting the old carrier and start hitting our network.

Track all of this from the Porting page. We email you on every status change.

For a full walkthrough including LOA templates and common failure modes, see *Appendix B — DID Porting Fundamentals*.

Bulk operations

The DID Inventory page supports bulk select via the checkboxes. With multiple DIDs selected:

- **Bulk assign** — assign many DIDs to one tenant at once
- **Bulk release** — unassign many at once
- **Bulk E911 update** — apply one address to many DIDs (useful for a tenant adding a new office and getting 20 numbers)

Bulk operations show a confirmation summary before executing.

REFERENCE · CHAPTER 11

Tenant Billing & Stripe

Three modes deep dive, custom keys, billing profiles, taxes, invoices.

Two flows of money — a recap

There are two billing flows on this platform. Don't confuse them.

Flow	Who pays whom	Where it's configured
Platform billing	You pay us	Settings ’ Billing ’ Subscription tab + Payment Methods tab
Tenant billing	Your tenants pay you	Settings ’ Billing ’ Tenant Billing tab + Settings ’ Billing Config

This chapter is about the **second one**. How you charge your tenants.

The three Stripe modes — deep dive

Mode	Where charges land	Setup time	When to use
Platform	Our Stripe account	None	Default. Use while waiting for Connect or for testing.
Connect (Express)	Your Stripe account, via Stripe-hosted onboarding	~5 minutes	**Recommended.** 95% of partners.
Custom Keys	Your existing Stripe account, via API key	Few minutes	Only if you have an existing Stripe setup with subscriptions, custom products, or webhooks you don't want to disturb.

Platform mode

You don't do anything. Tenants pay our Stripe account. Each month we manually transfer your earnings (minus our 3.99% fee) to a bank account you provide via support ticket. Settlement is monthly, around the 15th.

Use this temporarily. It's slow and manual. There's no good reason to stay here long-term.

Connect (Express)

Stripe creates a separate "Connected Account" for you. Customers' charges hit *your* account directly. We attach an `application_fee` of 3.99% of each charge that gets routed to us. You see the rest in your Stripe dashboard immediately.

Setup walkthrough is in chapter 5. Once active:

- Charges land in your Stripe within 7 days (Stripe's standard payout schedule, configurable)
- Refunds work normally — initiate from the platform or from your Stripe dashboard
- Disputes land in your Stripe — you handle them
- Tax forms (1099-K) are issued by Stripe to you, not by us

Custom Keys

You provide your own Stripe `sk_live_...` secret key. We make API calls *as* you. Charges look identical to anything else you do in your Stripe account.

Setup: Tenant Billing tab ’ Show Advanced Options ’ Custom Stripe Keys ’ enter secret key + publishable key ’ Save.

Your secret key is encrypted at rest with AES-256-GCM before storage. Only the resolved processor reads it.

Use Custom Keys if:

- You already have a complex Stripe Products/Prices/Subscriptions catalog you don't want to recreate
- You have your own webhooks you've already wired up to your CRM
-

> You want zero application fee (you don't pay us 3.99% on tenant charges in custom mode — but our platform subscription fee is higher to compensate)

Don't use Custom Keys if you just want simpler accounting. Connect is simpler in every way except this one specific case.

Statement descriptor

The text that shows up on your customer's credit card statement. **Set this**.

Settings ’ Billing ’ Tenant Billing tab ’ Statement Descriptor field. Max 22 characters. No special punctuation other than spaces, dashes, and `&`.

Examples that work:

- `ACME PHONES`
- `HRC TELECOM`
- `PINEDALE VOIP`

Examples that don't:

- `Acme's Phone Co.` (apostrophe + period)
- `THIS IS A REALLY LONG NAME` (over 22 chars)

If a customer doesn't recognize the charge on their statement, they file a chargeback. Chargebacks cost $15-25 each, count against your Stripe risk profile, and can get your account flagged. **Your customers should recognize the charge at a glance.** Use a name you actually market under.

Billing profiles

A **billing profile** is a template for how you charge a tenant. Settings ’ Billing ’ Billing Config (or via the Settings menu, "Billing Config" item).

Every tenant gets assigned one billing profile when you create them. The profile defines:

- **Pricing model** — Pay-As-You-Go or Flat Rate

- **Monthly base fee** — for Flat Rate models
- **Included quantities** — extensions, DIDs, minutes per month
- **Overage rates** — what you charge above the included amounts
- **Per-unit rates** — for PAYG: what you charge per extension/DID/minute

You can create as many profiles as you like. Common patterns:

- **Free Trial** — $0/mo, 30-day expiration, then auto-converts to Paid Starter
- **Small Office** — $99/mo flat, 5 extensions + 1 DID + 500 minutes included
- **Growing Business** — $249/mo flat, 25 extensions + 5 DIDs + 2500 minutes
- **Enterprise** — PAYG with $5/extension and $0.018/minute, no monthly minimum

Defaults: **Pay-As-You-Go** and **Flat Rate Starter** profiles are created automatically when you sign up. Edit them or create new ones.

The fields you set on a billing profile

When you open the profile editor (Settings ’ Billing Config ’ New / Edit), you'll see these rate fields:

- **Monthly base fee** — what the tenant pays just for having an account
- **Extension /mo** — per-extension rate
- **Standard DID /mo** — monthly rate for local numbers
- **Toll-Free DID /mo** — monthly rate for toll-free numbers (set this higher; your platform cost on toll-free DIDs is higher too)
- **Per Minute** — your usage rate

A note on the per-minute field: the profile editor exposes a single per-minute rate that applies to all outbound traffic for tenants on this profile. **Under the hood, the platform meters local and toll-free traffic separately** — your underlying platform cost differs by call type (see *Account & Subscription* for

the breakdown). The rate you set here is what your tenant sees on their invoice for every billable minute, regardless of call type.

If you want to charge your tenants differently for local vs. toll-free, the simplest pattern today is to create two billing profiles (e.g. "Local-Only" and "Mixed Traffic") and assign tenants based on their expected usage. Per-call-type tenant rates are on the roadmap.

Switching a tenant to a different profile

In the tenant edit modal, change **Billing Profile**. The change applies at the start of the next billing cycle. Don't switch mid-cycle if you can avoid it — it makes the prorated math messy.

Tax jurisdictions

If you collect sales tax / VAT / GST on phone services, configure jurisdictions here.

Settings ’ Billing ’ Tax Jurisdictions. Click **Add Jurisdiction**:

- **Name** — display label (shown on invoice line)
- **Jurisdiction code** — e.g., `US-AR-Pulaski` or `CA-ON`
- **Tax rate** — decimal (e.g., 0.085 for 8.5%)
- **Enabled** — toggle on/off

When you enable a jurisdiction, all *new* invoices to tenants in that jurisdiction include the tax line. Existing invoices are unchanged.

> Tax rules vary wildly by jurisdiction. **Talk to a CPA before configuring this.** Some jurisdictions tax voice services as a utility (different rate), some apply gross receipts tax, some don't tax intrastate but do tax interstate. The platform applies the rate you set; the legal compliance is on you.

Tenant invoices

Settings ’ Billing ’ Tenant Invoices (or top nav: Reports ’ Tenant Invoices). Lists every invoice generated for any of your tenants.

Columns:

- Invoice number
- Tenant name
- Issue date
- Due date
- Status (Draft / Sent / Paid / Overdue / Cancelled)
- Amount
- Actions

Click any row to see line items. Each invoice shows:

- The tenant being billed
- The billing period
- Each line item (extensions, DIDs, per-minute usage, additional charges)
- Subtotal, tax, total
- Payment status

Stats cards at the top: total invoices, paid count, unpaid count, outstanding amount.

Invoices are generated automatically:

- **Anniversary cycle** — for Flat Rate tenants, on the same day each month (the day they activated)
- **End of month** — for PAYG tenants, on the 1st with usage from the prior month

You can manually generate an invoice via the API or open a support ticket if you need an off-cycle invoice.

Refunds and disputes

Initiating a refund

Find the invoice. Click **Refund**. Enter the amount (full or partial). Confirm. The refund is sent to the customer's card via Stripe (3-5 business days for the customer to see it).

The wallet credit (for usage that was refunded) is automatically restored to your tenant's balance, so you don't double-pay them.

Handling a dispute

Disputes (chargebacks) land in *your* Stripe dashboard if you're on Connect or Custom Keys. We don't intermediate.

When you get one, gather evidence (the invoice, the tenant agreement, call records showing the service was rendered) and submit through Stripe's dispute interface. Most service-not-rendered disputes are winnable if you can show the calls happened.

If you're on Platform mode, we forward dispute notifications to your billing email. Reply with evidence and we'll submit on your behalf.

Auto-suspend on non-payment

By default, tenants who don't pay their invoices are flagged at 7 days overdue and **auto-suspended at 14 days**. Suspended tenants can't take calls.

Adjust the timing per-tenant (in their billing profile) or globally (Settings ’ Billing Config ’ Default Suspension After).

Some partners prefer manual suspension (review every overdue case yourself); some prefer aggressive auto-suspension. Choose based on your customer base.

Usage Limits & Spending Controls

Per-tenant caps, alert thresholds, auto-suspend.

Why this matters

Without limits, a tenant could:

- Provision 10,000 extensions overnight (your wholesale charges spike before you can react)
- Run a fraudulent toll-fraud campaign through your platform (5-figure bills in hours)
- Forget about a runaway auto-dialer that burns through 100,000 minutes

Usage Limits put hard caps on each tenant. When they hit the cap, you get an alert. Optionally, the tenant gets auto-suspended.

This is the single most important defensive setting on the platform.

Where it lives

Top nav ’ **Settings** ’ **Usage Limits** (or the gear menu in some layouts).

The page shows every tenant in a table:

- Name
- Monthly Spend Limit ($)
- Max Extensions
- Max DIDs
- Max Monthly Minutes
- Alert Threshold (%)
- Auto-Suspend (Yes/No)

- Actions

Empty cells mean "no limit" for that tenant on that field.

What you can cap

Limit	What it counts	When it triggers
Monthly Spend	All charges from the start of the current billing cycle (DIDs, extensions, per-minute, fees)	When the cumulative billed amount hits the cap
Max Extensions	Provisioned extensions on the tenant	When they try to create the (N+1)th
Max DIDs	Assigned DIDs to the tenant	When you (or they via API) try to assign the (N+1)th
Max Monthly Minutes	Inbound + outbound call minutes since cycle start	When the cumulative minutes hit the cap

Alert Threshold — percentage of any cap that triggers an early-warning email. Default 80%. So if a cap is 1000 minutes and threshold is 80%, you get an email when the tenant hits 800.

Auto-Suspend — checkbox. If on, the tenant is suspended automatically when *any* cap is hit. Their tenant dashboard shows a billing-suspended page.

Setting limits on a tenant

Click **Edit** on a tenant row. The Edit Limits modal opens with all six fields. Set what you want; leave blank for unlimited. Click **Save Limits**.

Changes are immediate. If a tenant is currently *over* a cap you just set, they're not retroactively suspended — but they'll trip the suspension on their next charge or extension creation.

Recommended starting limits

For new tenants you don't fully trust yet (most cases):

- **Monthly Spend** — $500 (typical small business spend ceiling)
- **Max Extensions** — 50 (or 2x what they say they'll need)
- **Max DIDs** — 10
- **Max Monthly Minutes** — 5,000 (covers a reasonably busy small business)
- **Alert Threshold** — 80%
- **Auto-Suspend** — On

For trusted long-term tenants, raise the caps or remove them. Don't set caps so loose that they're meaningless — even your most trusted tenant can have a misconfigured auto-dialer.

What happens when a cap is hit

1. **At threshold** — you get an email: "Tenant ACME has hit 80% of their monthly minute cap." Forward this to your tenant or just keep it for awareness.
2. **At cap** — if Auto-Suspend is on:
    - Tenant status ’ SUSPENDED
    - Inbound calls ’ "service interrupted" message
    - Outbound calls ’ blocked at the SIP level
    - Tenant sees a billing-suspended page when they log in
    - You get an email
    - We don't email the tenant directly (you do, with whatever brand voice you want)

If Auto-Suspend is off, you just get the alert email and the tenant keeps running. You decide what to do.

Tenant Defaults

Settings ’ Tenants ’ Tenant Defaults includes default limit values. These pre-fill when you create new tenants. Set sensible defaults and you won't have to remember to set limits on every new tenant.

Reset to Defaults

The Edit Limits modal has a **Reset to Defaults** button. Restores the tenant to whatever you've configured in Tenant Defaults.

Tracking usage in real time

Usage isn't only visible on the Usage Limits page. Each tenant's dashboard shows their current cycle usage at the top. You can also see live aggregate usage on **Reports ’ Tenant Invoices** filtered to the current month.

If you need fine-grained per-day data, the Analytics page covers it.

Limits and white-label

Tenants don't see the limits you've set on them. They see a generic "service suspended" page when they trip the cap. If they ask why, you can:

- Tell them they hit a usage cap and offer to raise it
- Tell them their billing was past due (technically true — they exceeded their spend allowance)
- Use the audit log to see exactly what triggered

How you communicate this is part of your brand. Some partners keep limits invisible; some show them in the tenant dashboard via a custom integration.

REFERENCE · CHAPTER 13

White-Label Your Tenants

Brand inheritance, custom domain, what tenants see, white-labeling this manual.

What's actually white-labeled

When a tenant logs into the platform, here's what they see based on your branding:

Surface	What's branded	What stays neutral
Dashboard header	Your logo, your brand name	The actual UI controls (button styles, layouts)
Login page	Your logo, your brand name (when accessed via your subdomain or custom domain)	The form itself
Email notifications	Sent from your brand email, signed with your brand name	Email infrastructure (DKIM/SPF aligns to your domain if custom domain is set)
Invoices	Your logo, brand name, support email, custom statement descriptor on cards	Invoice numbering format, line items
Help center (this!)	Your logo and name in the chrome	The screenshots and instructions (those show the actual platform)
Browser tab title	Your brand name (e.g., "ACME Phones — Dashboard")	—

Things tenants never see:

- The platform's name in normal use
- Other partners' names

- Other tenants' anything
- Internal admin tools

Where to set everything

Settings (in the top nav) has six tabs. The first three matter for branding:

Tab 1 — Company

The legal and admin info attached to your account:

- **Company Name** — your legal business name. Shows in account settings, internal invoices, and as a fallback if Brand Name is empty.
- **Billing Email** — where *we* email *you* (your monthly subscription invoice, alerts about your account).

This isn't customer-facing. It's about how we identify you internally.

Tab 2 — Branding

The customer-facing identity:

- **Logo** — drop or browse. SVG is best, PNG is fine, JPG works (no transparency). Displayed at ~32px tall in the dashboard header. Test it at small sizes.
- **Primary Color** — the accent color throughout the dashboard. Buttons, links, the active-page indicator. Pick a color with good contrast against white *and* against light grey.
- **Brand Name** — what your customers see everywhere. Defaults to Company Name if blank.
- **Brand From Email** — the "from" address on emails to your tenants (invoices, alerts, password resets). Use a noreply address you control. If your domain isn't custom-set up here yet, emails will come from a generic platform-managed address with your brand name in the display.
- **Brand Support Email** — where customers go for help. Shows on invoices, in error messages, in password reset emails. Use an inbox you actively monitor.

Tab 3 — Domain

Your custom domain. Optional but recommended.

Without a custom domain, your tenants access the platform at `yourbrand.simuwave.com`. Functional but breaks the white-label illusion at the URL bar.

With a custom domain, they use `phones.yourbrand.com` or whatever you choose. Setup:

1. Pick a hostname. Common patterns: `phones.yourbrand.com`, `voip.yourbrand.com`, `pbx.your-brand.com`. Subdomain on your existing domain is easiest.
2. Enter the hostname in the Custom Domain field. Click **Save**.
3. The page now shows you a target IP and DNS instructions. Add an `A` record (or `CNAME` to a target hostname we provide) at your DNS provider.
4. Click **Check Domain Status**. Status flips PENDING ’ VERIFYING ’ ACTIVE within a few minutes once DNS propagates.
5. SSL is automatic. We use Let's Encrypt; certificates issue within ~10 minutes of the domain reaching ACTIVE status.
6. Once ACTIVE, tenants accessing your custom domain see your branded portal. The old `your-brand.simuwave.com` URL still works as a fallback.

Tab 4 — Notifications

Toggle which alerts you receive:

- New tenant signups
- Usage limit alerts
- Monthly reports
- System updates / maintenance windows

These auto-save when you toggle.

Tab 5 — Integrations

Reserved. Future home for HubSpot, Salesforce, Zapier connectors.

Tab 6 — Account

Your password, 2FA setup, and account deletion.

> Account deletion is irreversible and only works if you have zero tenants and zero outstanding balance. To delete, you'll need to delete all tenants first, then settle final invoices, then come here. The button requires typing "DELETE" to confirm.

Brand inheritance

What your tenants see on each surface:

Surface	Source
Tenant dashboard header	Partner's Brand Name + Logo + Primary Color
Tenant dashboard chrome	Partner's Primary Color (buttons, links)
Tenant invoices	Partner's Brand Name + Logo + Support Email
Tenant emails	Partner's Brand From Email + Brand Name signature
Tenant credit-card statements	Partner's Statement Descriptor
Tenant help center	Partner's Brand Name + Logo (this very document, when viewed via your domain, shows YOUR brand!)

Tenants never see the platform name unless they go looking for it (it's mentioned in the legal terms and in technical support emails).

How to white-label this very help center for your tenants

Yes. The help center white-labels itself.

When a tenant opens `help.[your-custom-domain]` (or `[your-subdomain].simuwave.com/help`), the platform detects which partner subdomain or custom domain the request came in on, looks up your brand, and substitutes:

- Your logo in the top-left
- Your brand name in the header
- Your primary color in accents and links
- Your support email in the footer
- Your brand name on the PDF cover

The actual content — the screenshots, the instructions — stays the same. (Your tenants are using the same dashboard you are; the screenshots show that dashboard. The branding wrapper around them changes.)

This works automatically. You don't configure anything per-manual. As soon as your branding is set in Tab 2 above, the help center reflects it.

If you want a tenant-only entry point, link to `[your-domain]/help/tenant` from inside the tenant dashboard, or include the link in your welcome email when you onboard a new tenant.

Email deliverability — the gotcha

Outbound emails from the platform default to a generic platform-managed sender with your brand name displayed. Most email providers (Gmail, Outlook) deliver these fine, but they're occasionally flagged as suspicious because the displayed name and the technical sender domain don't match.

For best deliverability, set up your own email infrastructure to align with your custom domain. Specifically:

- Add SPF and DKIM records at your DNS provider
- Configure DMARC to monitor (not reject yet)

Open a support ticket and we'll guide you through the specifics for your domain — it's one-time setup, takes ~30 minutes, and dramatically improves email deliverability.

What white-labeling doesn't cover

- The mobile soft-phone apps (if your tenants use them) are still branded with the app maker's name. We don't yet offer a white-label mobile app.
- Phone provisioning files for desk phones contain technical SIP server hostnames that aren't your domain. End users don't see this; only the IT person setting up the phone does.
- Carrier-side caller ID (CNAM) is a separate system; it shows whatever name *your tenant* set on each DID, not your brand.

Reports & Analytics

MRR, ARR, ARPU, trends, top tenants.

Two reporting pages

Top nav ’**Reports** has two items:

- **Revenue Analytics** — your business performance
- **Tenant Invoices** — every invoice generated for any of your tenants

This chapter covers both.

Revenue Analytics

The headline view of your business. Top of the page has a **period selector**: 7d / 30d / 90d / 1y. Default is 30d. Everything on the page recalculates when you change it.

First metrics row (4 cards)

- **MRR (Monthly Recurring Revenue)** — sum of all your tenants' monthly subscription amounts (their flat-rate fees). Doesn't include usage overages or one-time charges. The number you'd report to a board if you had one.
- **ARR (Annual Recurring Revenue)** — MRR × 12. Same caveats.
- **Revenue This Period** — actual cash collected in the selected period. Includes everything: subscriptions, overages, one-time charges, refunds (negative).
- **Active Tenants** — count of tenants in ACTIVE status, with a sub-line showing **ARPU** (Average Revenue Per User = Revenue This Period ÷ Active Tenants).

Growth percentages compare to the equivalent prior period (e.g., 30d vs the 30d before that).

Second metrics row (4 cards)

- **Lifetime Revenue** — total collected since you started, all-time
- **Outstanding Balance** — sum of unpaid invoices across all tenants
- **Collection Rate** — invoices paid on time ÷ total invoices issued (in the period)
- **Avg Revenue / Tenant** — same as ARPU, included again because it's the most-cited metric

Usage & Revenue Breakdown (3 columns)

Three cards stacked horizontally:

- **Extensions** — total provisioned across all tenants, plus the dollar revenue attributable to extension fees in the period
- **DIDs** — same shape, for phone numbers
- **Minutes** — same shape, for per-minute usage

Lets you see at a glance which line item is your biggest revenue stream. Most partners discover that DIDs are smaller revenue but extensions are the main lever.

Monthly Trends Table

Last 12 months of:

- Revenue
- Invoices Sent
- Invoices Paid
- New Tenants
- Churned Tenants

Useful for spotting seasonality, the impact of pricing changes, and your churn rate.

> **Churn rate calc:** churned tenants ÷ active tenants at start of month. Healthy SMB phone-service churn is 1-3% monthly. Above 5% means something's wrong (likely a pricing or service issue, not a product issue).

Tenants by Revenue Table

Every active tenant ranked by revenue contribution:

- Tenant Name
- Subscription Tier (badge)
- MRR
- Total Revenue (lifetime)
- Outstanding Balance
- Last Payment Date

Click any row to jump to that tenant's account.

The 80/20 rule applies: you'll usually find ~20% of your tenants generate ~80% of revenue. This table makes that obvious. Use it to prioritize who you call first when you launch a new product, who gets early-access to features, and who you absolutely do not want to lose.

Exporting

A small **Export CSV** button in the top right exports the current view to a CSV. Period filter applies.

Tenant Invoices

A single table of every invoice the platform has generated for any of your tenants.

Stats cards at the top:

- Total Invoices (in the selected period)
- Paid count
- Unpaid count

- Outstanding Amount

Filters:

- **Status** — All / Draft / Sent / Partially Paid / Paid / Overdue / Cancelled
- **Search** — by invoice number, tenant name, or SIP prefix
- **Date range** — calendar picker

Columns:

- Invoice #
- Tenant
- Issue Date
- Due Date
- Status (color-coded badge, with overdue indicator if applicable)
- Amount
- Actions (View Details / Download PDF / Refund)

Invoice details modal

Click **View Details** on any row.

- **Header** — invoice number, tenant, status, dates, billing period
- **Line items** — every charge: extension fees, DID fees, per-minute usage, overages, one-time charges, taxes
- **Totals** — subtotal, tax, total, amount paid, amount due
- **Action buttons** — Send Reminder, Mark as Paid (manual), Issue Refund, Void (only available if Draft)

Download PDF

Every invoice has a downloadable PDF version. The PDF is branded with your logo, brand name, support email, and statement descriptor. Hand these to tenants, your accountant, or the IRS.

What if you want a custom invoice?

The standard invoice template covers most cases. If you need something custom (additional fields, different layout, your own branding details), edit your **Invoice Template** under Settings ’ Billing.

Common reporting questions

"What's my margin on Tenant X?"

Margin = (revenue from tenant) (your wholesale cost for that tenant).

Revenue: see Tenants by Revenue Table on the Analytics page.

Wholesale cost: roughly = (their extensions × your per-extension wholesale rate) + (their DIDs × your DID rate) + (their minutes × your per-minute rate). See Settings ’ Billing ’ Subscription tab for your current wholesale rates.

We don't currently surface per-tenant margin as a number — you'd compute it from the two pages. Future enhancement.

"Why did revenue drop month-over-month?"

Check the Monthly Trends table. Three usual suspects:

- Churn — see "Churned Tenants" column
- Lower usage — check the Usage & Revenue Breakdown card; if minutes dropped, your tenants are calling less
- Pricing change — if you reduced rates recently, MRR drops mechanically

"Which tenants are at risk of churning?"

We don't have a churn-risk score yet. Best heuristic: tenants whose usage has dropped >50% in the last 30 days vs the prior 30. You'd compute this manually from the Tenant Invoices page or via the API.

"Can I get this data into my accounting system?"

Yes. Use the API (chapter 15) to pull invoices, payments, and transactions on a schedule. The webhook system (chapter 16) sends real-time events as well.

REFERENCE · CHAPTER 15

API Access

Where to create keys, base URL, link to docs.

What the API does

Everything you do in the partner dashboard, you can do via the API. Common uses:

- **CRM integration** — auto-create tenants when a deal closes in HubSpot/Salesforce
- **Provisioning automation** — bulk-create extensions from a CSV when a customer onboards
- **Billing integration** — pull invoices into your accounting system on a schedule
- **Customer self-service** — let tenants do specific actions in your branded app, not in our dashboard
- **White-labeling** — build your own dashboard on top of our API and never expose ours

Where the docs live

The full API reference, with request/response examples for every endpoint, is at:

> `https://api.simuwave.com`

That same hostname serves both the interactive documentation (at the root path) and the API itself (at `/v1/*`). The docs page has the full OpenAPI spec, search across every endpoint, and a try-it-out feature where you can test calls against your account from the browser.

This chapter doesn't duplicate the API reference. It tells you how to get *access* to the API and the high-level shape of what's available.

Creating an API key

Top nav ’**Settings** ’**API Keys**. Click **Create API Key**.

The form:

- **Name** — for your own reference, e.g., "Production CRM Integration"
- **Scopes** — which categories of endpoints this key can hit. Checkboxes grouped by resource: Tenants, Phone Numbers, Extensions, Call Flows, Queues, Voicemail, Calls, Billing, Webhooks, Provisioning. Use **Select All** during initial setup if you want a key that can do everything.
- **Tenant Scope** — leave blank for a partner-level key (full access across all your tenants). Or select specific tenants to restrict the key to those tenants only. Useful if you want to give a third-party developer access to one tenant without exposing the rest.
- **Rate Limit** — requests per minute. Default 100, max 10,000. The platform enforces this; over-rate requests get HTTP 429.

Click **Create Key**.

> **The plaintext key is shown exactly once.** Copy it immediately and store it somewhere safe (your secrets manager, your CI environment, your `.env` file). After you close the modal, only a masked version of the key is visible. We can't recover lost keys — you'd have to revoke the old one and create a new one.

API base URL

```
https://api.simuwave.com/v1
```

(Or `https://api.simuwave.com/v1` regardless of your custom domain — the API isn't currently served from custom domains.)

Authenticating

Every request uses bearer authentication. Include your key in the `Authorization` header:

```
Authorization: Bearer sk_live_abc123def456...
```

Example with `curl`:

```
curl https://api.simuwave.com/v1/tenants \
-H "Authorization: Bearer sk_live_abc123def456..."
```

If your key is invalid, expired, or revoked, you'll get a `401 Unauthorized`. If it doesn't have permission for the resource, you'll get `403 Forbidden`.

What's available

The API mirrors the dashboard. High-level groups:

Group	Sample endpoints
Tenants	Create, list, update, suspend, unsuspend, get usage
Extensions	Create, list, update, delete, reset password
Phone Numbers	Search inventory, list assigned, assign to tenant, release, set CNAM, register E911
Call Flows	Create, list, update, attach DIDs, detach DIDs
Queues / Ring Groups / Voicemail	Standard CRUD
Calls (CDR)	List call records, get a specific call's metadata + recording URL
Billing	List invoices, get invoice detail, create checkout session, manage subscription
Faxes	Send, list inbox, list sent, get document
Port Requests	Create, list, cancel
Webhooks	Manage your webhook endpoints (covered in chapter 16)

Full method list, request/response shapes, and error codes are at api.simuwave.com.

Managing keys

The API Keys table shows every key:

- Name
- Key (masked: `sk_live_...abc1`)
- Scopes count
- Tenant Scope (badge: "All tenants" or count of restricted tenants)
- Status (ACTIVE / REVOKED / EXPIRED)
- Last Used (timestamp or "Never")
- Actions

You can:

- **Edit** — change scopes and tenant scope (you can't change the key value or name)
- **Revoke** — disable the key. Existing requests using it will start returning 401 within ~60 seconds (cache TTL).

Best practices

- **One key per integration.** If you have a CRM integration, an accounting integration, and a tenant self-service app, that's three keys. Easier to revoke one without breaking the others.
- **Scope down.** Only grant the scopes the integration actually needs. A key that only reads invoices doesn't need write access to extensions.
- **Restrict to specific tenants** when handing keys to third parties.
- **Rotate keys quarterly** as a hygiene practice. Create a new one, switch your integration over, revoke the old.
-

Monitor Last Used. A key showing "Never" for months is probably orphaned and should be revoked. A key suddenly going from "minutes ago" to "hours ago" might mean an integration broke.

- **Never put keys in client-side code, public repos, or chat logs.** If you accidentally leak a key, revoke it immediately, then audit the API request log (in our Audit Log) for any unexpected calls.

Rate limits

The platform-wide limit is 1000 requests/minute per partner across all keys. Per-key limits (set when you create the key) cap individual key usage. Hit either and you get HTTP 429 with a `Retry-After` header indicating when to retry.

Most integrations don't get anywhere near these limits. If you have a use case that requires sustained high request rates (e.g., real-time call analytics), open a support ticket and we'll discuss options.

SDKs

Currently no official client libraries. The API is straightforward REST + JSON; community-maintained wrappers exist in Python, Node.js, and Ruby — search GitHub for "simuwave api" or generate one yourself from the OpenAPI spec at api.simuwave.com.

Webhooks vs polling

For events you want to react to (a tenant signed up, a call ended, a payment succeeded), use webhooks (chapter 16). For periodic data syncs (e.g., pull yesterday's invoices into your accounting system), use polling.

Don't poll the API every few seconds for events — your rate limit will run out and you'll get inconsistent latency. Webhooks are real-time and free.

Webhooks

Endpoints, events, deliveries debugger, secret rotation.

What webhooks do

A **webhook** is an HTTP request that the platform sends to your server when something happens. Examples:

- A new tenant signs up ’ we POST a JSON payload to your endpoint with the tenant's details
- A call completes ’ we POST the call record to your endpoint so you can sync it to your CRM
- A payment fails ’ we POST so you can trigger a follow-up email from your own system

Webhooks are how you build real-time integrations without polling our API.

Where webhook setup lives

Top nav ’**Settings** ’**Webhooks**. Click **Add Endpoint**.

The form:

- **Endpoint URL** — your server's URL, must be `https`. Examples: `https://api.yourcompany.com/webhooks/simuwave`, `https://hooks.zapier.com/hooks/catch/12345/abcdef`
- **Description** — optional, for your own reference
- **Events to send** — checkboxes grouped by category. Pick exactly the events your integration cares about. **Select All** during testing if you want to see everything; tighten down later.

Click **Create Endpoint**.

> **The signing secret is shown exactly once.** Copy it immediately. You'll use it server-side to verify that webhook requests genuinely came from us.

Available events

Category	Events
Tenants	tenant.created, tenant.updated, tenant.suspended, tenant.unsuspended, tenant.deleted
Phone Numbers	phone_number.purchased, phone_number.assigned, phone_number.released, phone_number.updated
Extensions	extension.created, extension.updated, extension.deleted
Billing	subscription.updated, subscription.activated, invoice.created, invoice.paid, invoice.failed, payment_method.attached, payment.failed, checkout.session.completed
Calls	call.initiated, call.answered, call.completed, call.failed
Inbound Calls	inbound_call.ringing, inbound_call.answered, inbound_call.completed, inbound_call.abandoned

Pick only the events you'll actually use. Subscribing to everything wastes your server's time processing payloads you'll just discard.

Payload shape

Every webhook is a POST request with `Content-Type: application/json`. The body looks like:

```
{
"id": "evt_abc123",
"type": "tenant.created",
"created_at": "2026-05-04T14:23:45Z",
"partner_id": "ptr_xyz789",
"data": {
"tenant": {
"id": "tnt_def456",
```

```
"name": "ACME Plumbing",
"sip_prefix": "acme",
"status": "TRIAL",
...
}
}
}
```

The `data` field's shape is event-specific. Full schema for every event is at api.simuwave.com under "Webhook Events."

Verifying signatures

Every webhook request includes a `X-Simuwave-Signature` header containing an HMAC-SHA256 of the raw request body, signed with your endpoint's secret.

Pseudocode for verification:

```
expected = hmac_sha256(secret, raw_body).hex()
received = request.headers['X-Simuwave-Signature']
if not constant_time_equal(expected, received):
 return 401  # not from us
```

Always verify. Without verification, anyone who knows your endpoint URL can POST fake events to it.

Delivery and retries

We attempt delivery up to 8 times over ~24 hours with exponential backoff:

Attempt	Delay
1	Immediate
2	30 seconds
3	2 minutes
4	10 minutes
5	1 hour
6	4 hours
7	12 hours
8	24 hours

We consider delivery successful if your endpoint returns any 2xx status code within 10 seconds. Anything else (timeout, 4xx, 5xx) counts as a failed attempt.

After 8 failed attempts, we stop. The event is marked **DEAD**.

If your endpoint is consistently failing, your endpoint Status will show **Consecutive Failures: N**. If N reaches 100, we automatically disable the endpoint to stop wasting resources. You can re-enable it once you've fixed your server.

The deliveries debugger

Each endpoint row in the Webhooks list has a **Deliveries** action. Click it.

A modal opens showing the last 100 delivery attempts:

- Event Type
- Status (DELIVERED / PENDING / FAILED / DEAD)
- Attempts (e.g., 3/8)
- Last Attempt timestamp
- Response Code (200, 500, "Timeout", etc.)

- **Redeliver** button

Use this when integrating to confirm your endpoint is receiving things correctly. Each delivery card expands to show the full request body and the response your server returned.

> **Redeliver** is essential for debugging. Trigger an event in our dashboard, see it land in your Deliveries view, and click Redeliver as many times as you need while you debug your endpoint code. It's the same payload every time.

Rotating secrets

If you suspect your endpoint secret was leaked (e.g., a developer pushed it to a public git repo), click **Rotate Secret** on the endpoint row. A new secret is generated and shown to you exactly once.

The old secret stops working immediately. Update your endpoint code to use the new secret. There's no grace period — plan the rotation during a maintenance window.

Disabling and deleting

- **Toggle Status** — disable the endpoint without deleting it. Useful for temporary maintenance.
- **Delete** — remove the endpoint entirely. Past delivery history is preserved but no new events will be sent.

Common patterns

Webhook → Slack notification

A 5-minute Zapier integration. Subscribe to `tenant.created`, point the URL at a Zapier "Catch Hook" trigger, action = "Send Slack message." Now your sales team gets a Slack notification when a new tenant signs up.

Webhook → CRM contact creation

POST events to your CRM's API endpoint. Map `tenant.created` ' create a HubSpot/Salesforce account.

Webhook 'call analytics ingestion

Subscribe to `call.completed` and `inbound_call.completed`. POST to your data warehouse's ingestion endpoint. Now you have real-time call data flowing into BigQuery / Snowflake / Postgres.

Webhook 'invoice processing

Subscribe to `invoice.paid`. POST to your accounting system to mark the corresponding entry paid.

Common pitfalls

- **No signature verification** — accept the consequences (someone WILL eventually find your endpoint URL)
- **Slow endpoints** — if you do heavy work synchronously, return 200 immediately and process asynchronously (queue + worker pattern). Webhooks that exceed 10s timeout count as failed.
- **Returning 4xx for valid requests** — we'll retry several times then stop. If you accidentally throw a 400 for a valid event, the event is lost.
- **Subscribing to too many events** — every event is processing time on your server. Subscribe to what you need, not everything.
- **Forgetting to handle duplicates** — under rare conditions (network blips during the response), we may send the same event twice. Use the `id` field for idempotency.

REFERENCE · CHAPTER 17

Account Settings & Team

Company info, notifications, team members, deleting your account.

Two pages, related but separate

- **Settings** — your *partner-level* account info, branding, notifications, custom domain (covered in earlier chapters)
- **Users** — the team members who can log into your partner dashboard

This chapter focuses on Users plus a few miscellaneous settings.

Users — your team

Top nav ’**Settings** ’**Users**.

The list shows everyone with login access to your partner dashboard:

- Email
- Name
- Role
- Email Verified (badge)
- Last Login
- Created Date
- Actions

There are two roles:

Role	Permissions
Partner Admin	Full access. Can do everything you can do, including inviting more partner admins, deleting tenants, and changing billing settings.
Partner User	Read-only access to dashboards. Cannot create tenants, change billing, or modify settings. Used for sales/support staff who need visibility but shouldn't change anything.

> Currently only two roles. If you need finer-grained permissions, open a feature request.

Inviting a team member

Click **Invite User**. Form fields:

- **Email** — they'll receive an invite to this address
- **Name** — display name in the dashboard
- **Role** — Partner Admin or Partner User

Click **Send Invite**. The invitee gets an email with a link. Clicking the link takes them to a "set your password" page; from there they can log in.

Invites expire in 7 days. If the invitee doesn't accept, you can resend from the Users list.

> If the invite email doesn't arrive, check your **Brand From Email** setting. We send invites *as* your brand. If your brand-from email is bouncing or marked as spam, invites get dropped.

Removing a team member

Click **Remove** on their row. Confirm. The user can no longer log in. Their existing sessions are invalidated within ~60 seconds.

Removing a user does NOT delete their audit-log entries. You can still see what they did historically.

Notifications — choosing what you get emailed about

Settings ’ **Notifications** tab. Four toggles:

- **New Tenant Signups** — email when a tenant is created (useful if customers self-serve via a sign-up flow you've built)
- **Usage Alerts** — when any tenant trips a usage cap or threshold (recommended: ON)
- **Monthly Reports** — a summary of last month's revenue, top tenants, churn (recommended: ON)
- **System Updates** — maintenance windows, planned downtime, major feature releases

Toggles auto-save when you click them. No save button.

2FA (two-factor authentication)

Settings ’ **Account** tab. **Enable Two-Factor Authentication**.

Scan the QR code with your authenticator app (Google Authenticator, 1Password, Authy, etc.). Enter a 6-digit code from the app to verify. Save the recovery codes — you'll need them if you lose your phone.

Once enabled, every login requires email + password + 6-digit code.

We strongly recommend enabling 2FA on every partner admin account. You're managing customer phone systems and customer billing — a compromised account is a serious problem.

Changing your password

Settings ’ **Account** tab ’ **Change Password**. Enter the current password and the new one twice. The new password must be at least 10 characters with at least one uppercase letter and one digit.

If you forgot the password (and aren't currently logged in), use the "Forgot password?" link on the login page instead.

Deleting your account

Settings ’**Account** tab ’**Delete Account** section.

Account deletion is irreversible and only works if:

- You have zero active tenants
- You have zero outstanding invoices
- You have no DIDs in your inventory (release them all first)
- You have no positive wallet balance (request a refund first)

To delete, type "DELETE" in the confirmation box and click the button. Your account is purged within 24 hours.

If you want to take a break but might come back, **don't delete** — instead, suspend yourself by canceling your platform subscription (you'll keep your data for 90 days at no charge, and can reactivate any time during that window).

Where session data lives

Logged-in sessions are stored as cookies, scoped to your custom domain (or to `*.simuwave.com` if you don't have a custom domain). Sessions last 8 hours, then you re-login.

If you're working on shared infrastructure and need to force-logout your team, open a support ticket — we can invalidate all sessions across your account for security incidents.

Support

Creating tickets, categories, priorities, tracking.

Getting help

There is no in-platform ticket system. Support runs in two places:

1. **The Help Center** at `/help/partner` — linked as **Help** in the top nav. This manual lives there, plus the tenant manual, search, and screenshots.

2. **Email** to the support address shown on your account settings page (by default, `support@simuwave.com`).

Start with the Help Center. The vast majority of "how do I…" questions are already documented there, and self-service is faster than waiting on a reply.

When to use the Help Center

For:

- "How do I do X?" — every workflow in the platform is documented chapter-by-chapter
- Concept questions — what's a SIP prefix, what's a billing profile, how does the wallet work
- Reference — full tier pricing, glossary, status meanings
- Troubleshooting checklists — porting, E911, Stripe Connect onboarding

The Help Center is split into two manuals — the **Partner Manual** (this one, for you as the reseller) and the **Tenant Manual** (point your customers at this one). Both are public; you can deep-link any chapter into your own support docs or emails to tenants.

When to email support

Use the support email for:

- **Bugs** — something doesn't work as documented
- **Account issues** — billing disputes, lost access, wallet credits, plan changes that need a human
- **Carrier issues** — DID number won't port, CNAM not propagating, STIR/SHAKEN attestation problems
- **Compliance / legal** — E911 questions, regulatory filings, abuse reports about a tenant's traffic
- **Feature requests** — we read every one

For genuine emergencies (entire platform down, all your tenants offline) — email `support@simuwave.com` with `[URGENT]` in the subject line and call your account contact if you have one. Don't wait on a ticket queue.

Which email address to use

By default, support is `support@simuwave.com`.

If you've branded your own portal (Settings ’ Brand Identity ’ Support contact email), the address shown to **your tenants** is your own — they email you, not us. The address shown on **your** partner settings page is still the SimuWave support address; that's the one to use for your own support.

If in doubt, the email shown on **Settings** ’**Brand Identity** under "Support contact email" is what your tenants see in their portal footers and invoice PDFs. Your own support relationship is always direct with SimuWave.

What makes a good support email

The more we know upfront, the faster we can help. Include:

- **What you tried to do** (in user terms, not technical)
- **What happened instead**
- **Tenant ID and SIP prefix** if it affected one of your tenants
- **Phone number** if it's about a specific DID
- **Approximate time** of the issue (your timezone is fine)

- **Browser** if it was a UI issue
- **API request ID** if it was an API call (we return a request ID in every response header)

A good email: *"Tenant ACME (sip prefix: acme) tried to provision extension 105 at ~2:30pm CST today. The form errored with 'Internal server error.' Browser is Chrome on macOS. Other extension creates worked fine immediately before and after."*

A bad email: *"extensions broken plz fix"*

Priority and response targets

We don't have a formal priority dropdown — say it in the subject line and we'll triage.

Urgency	When to use	Subject prefix	Response target
Low	"How do I…" questions, feature requests	(none)	2 business days
Normal	Things that are wrong but you have a workaround	(none)	1 business day
High	Production impacted but not down — one tenant affected, billing wrong	`[HIGH]`	4 hours
Urgent	Service outage affecting multiple tenants	`[URGENT]`	1 hour

Don't mark everything urgent. We triage by actual impact, and abusing the prefix slows down real emergencies for everyone.

White-label: who supports whom

If your white-label is enabled, **your tenants contact you**, not us. They see your branding, your support email, and your portal. From their perspective, you *are* the platform.

You then contact SimuWave support if you need our help with anything you can't resolve yourself. We never reach out to your tenants directly without your involvement.

If white-label is **not** enabled, your tenants see the SimuWave brand and contact `support@simuwave.com` directly. This is fine for the early days, but most partners flip on white-label as soon as they have a few paying customers.

Changelog & updates

`simuwave.com/status` is the public changelog — new features, improvements, and fixes as we ship them. RSS available at `simuwave.com/status/feed.xml`. Worth a bookmark; many feature questions get answered by skimming what's recently shipped.

For active platform incidents, email `support@simuwave.com` with `[URGENT]` — there is no separate public incident status page right now.

Developer / API support

For API issues, the full API reference is at `https://api.simuwave.com`. Every endpoint has request/response examples, error codes, and rate limits documented.

If you've integrated against the API and hit something the docs don't cover, email support with the **request ID** from the failing response header — we can pull the full request and response from our logs and tell you exactly what happened.

What we don't do

- We don't proactively monitor your tenants' setups for misconfiguration. That's on you.
- We don't provide first-line support to your tenants when white-label is on. They contact you; you contact us if needed.
- We don't have a phone hotline. All support is via email. (We're a small platform; the math doesn't work.)
- We don't provide custom development or paid implementation services. The API is documented; the Help Center covers everything else.

Feedback

Feature requests, copy bugs in this manual, missing chapters — email support with `[Feedback]` in the subject. We read every one, triage weekly, and feature requests directly influence the roadmap. Can't promise to build everything, but the ones we do build usually came from a partner asking for them.

Appendix A — Pricing Strategy

What this appendix is

A short primer on pricing your tenants. This is opinion, not gospel. Your market and brand may push you in different directions.

The two pricing models

You can charge tenants in two basic shapes:

Pay-as-you-go (PAYG)

Tenant pays only for what they use. Common rates:

- $10-20 per extension per month
- $2-5 per DID per month
- $0.02-0.04 per minute (inbound + outbound)
- No monthly minimum

Pros: customers feel they're not over-paying. Easy to sell to skeptical buyers ("you only pay if you use it"). Low commitment.

Pros for you: higher revenue per minute (your wholesale per-minute is ~$0.012, retail at $0.025 = ~50% margin on minutes alone).

Cons: unpredictable revenue. Bad month for a tenant = bad month for you. Hard to forecast MRR.

When to use: new partners building book of business, consumer/SOHO market, tenants that don't know their volume.

Flat rate

Tenant pays a fixed monthly fee. Examples:

- $99/mo: 5 extensions + 2 DIDs + 500 minutes included; $0.025/min over

- $299/mo: 25 extensions + 5 DIDs + 2500 minutes included
- $599/mo: 50 extensions + 10 DIDs + 5000 minutes included
- $999/mo: 100 extensions + 20 DIDs + unlimited minutes

Pros: predictable revenue. Easier to sell to procurement-driven buyers. Higher customer lifetime value.

Pros for you: higher MRR predictability. Customer feels "all-you-can-eat" even if they're under their cap most months.

Cons: you eat overage cost if a tenant goes way over their included minutes. You leave money on the table for tenants who under-use.

When to use: B2B market, established partners with stable customer base, tenants who want a single line item on their P&L.

Hybrid (recommended)

Most successful partners offer both — a flat-rate "Standard" plan and a PAYG "Starter" plan. Customers self-select. Switch them between profiles as they grow.

Pattern: PAYG for trials and first 30 days, Flat Rate after they've stabilized. "Starter $99 includes 5 extensions; once you hit 8, we'll move you to Pro at $299."

Pricing tiers — practical numbers

A starting point. Adjust to your market.

Tier Name	Monthly	Includes	Overage
Trial	$0	30 days, 2 ext, 1 DID, 200 min	n/a (cap is hard)
Starter	$99	5 ext, 2 DIDs, 500 min	ext $20, DID $4, min $0.025
Growth	$299	25 ext, 5 DIDs, 2500 min	ext $15, DID $3, min $0.020
Business	$799	75 ext, 15 DIDs, 8000 min	ext $12, DID $2.50, min $0.015
Enterprise	Quote	Negotiated	Negotiated

These are competitive with established VoIP resellers (Phonebooth, OnSIP, etc.). You can charge less if you're competing on price; you can charge significantly more if you're bundling premium support, white-glove setup, or SLAs.

Setup fees and one-time charges

Most successful partners charge for:

- **Setup / onboarding** — $200-1000 depending on size
- **Number porting** — $25-50 per number
- **Hardware (desk phones)** — your cost + 20-50% margin
- **Custom call flows / IVR design** — $250-1500 if you're doing it for them
- **On-site installation** — your hourly rate

These are on top of monthly fees. Frame as "investment" not "fee" — sets expectations for ongoing value.

What to actually charge

The honest answer: charge what your customers will pay. The above numbers are starting points. Run your first 5-10 sales without changing pricing. If you close 80%+, raise prices. If you close <40%, lower prices or fix your value proposition.

> Most new VoIP partners undercharge by 30-50%. Customers don't pick the cheapest phone provider — they pick the most reliable, the easiest to work with, and the one whose support actually answers. Price like you're worth more than the competition because you almost certainly are.

What NOT to do

- **Don't compete on price alone.** Race to the bottom. Brutal margins. Difficult support. Avoid.
- **Don't bundle minutes you can't sustain.** If your wholesale per-minute is $0.012 and you sell unlimited minutes for $50/extension, an aggressive call center customer will eat your lunch.
- **Don't charge per-feature.** "$5/mo for voicemail-to-email" is hostile pricing. Bundle reasonable features. Only charge separately for things that have real per-customer cost (recordings storage, transcription minutes, phone hardware).
- **Don't offer free toll-free.** Toll-free per-minute is your cost. If you give it away, you lose money on every inbound minute. Charge $0.04-0.08/min minimum.

When to raise prices

Annual review is a healthy practice. Send your tenants a notice 60 days before any price change. Most won't churn over a 5-10% increase if your service is solid.

Don't raise prices to fix declining margins from your wholesale costs going up — your tenants don't care about your costs. Raise prices because you've added value.

Appendix B — DID Porting Fundamentals

What porting is

Number porting is the process of moving an existing phone number from one carrier to another. Federal law (Local Number Portability) requires carriers to allow this. The number stays the same; the underlying carrier and routing changes.

Most partners need to port numbers regularly because customers come to you with numbers they've had for years and don't want to change.

The actors

Three parties in every port:

- **Customer** — owns the number, signs the LOA
- **Losing Carrier (LSC)** — currently provides service; loses the number
- **Gaining Carrier (us, via the platform)** — receives the number; will route calls going forward

The customer initiates by signing a Letter of Authorization (LOA) authorizing the gaining carrier to take over.

Information you need from the customer

For each number being ported:

- **Phone number(s)** — including main and any DIDs they want to bring
- **Current carrier name** (Verizon, AT&T, Spectrum, RingCentral, etc.)
- **Account number with the current carrier**
- **PIN / passcode for that account** (some carriers require this)
-

Account holder name — the legal name on the carrier account, exactly as it appears on the bill (capitalization matters)

- **Service address** — exactly as it appears on their carrier bill
- **Most recent carrier bill** — PDF, ideally less than 30 days old
- **Signed LOA** — see template below

Get all of this before submitting. Missing information is the #1 cause of port rejections.

Letter of Authorization (LOA) template

A simple LOA includes:

```
LETTER OF AUTHORIZATION (LOA)
FOR PORTING TELEPHONE NUMBERS

Date: [date]

I, [account holder name], authorized representative of
[business name], hereby authorize [your brand name] and
its underlying telecommunications partner to act as my
agent in transferring the following telephone number(s)
from [current carrier name] to their service:

[number 1]
[number 2]
...

The service address for these numbers is:
[street address]
[city, state, ZIP]

The current carrier account number is: [account number]

I confirm I am authorized to make this change.

Signature: _____
```

```
Name (printed): _____________
Title: ______________________
Date: _______________________
```

PDF or scanned image is fine. The signature must be the actual account holder, not their assistant.

Submitting the port

Top nav ’**Numbers** ’**Port Numbers In**.

Click **New Port Request**. Fill in:

- Number(s) being ported
- Current carrier
- Account holder name + account number + PIN
- Service address
- Customer's tenant (which tenant the numbers go to once active)
- Desired port date (we'll honor if reasonable; carrier sets the actual FOC date)

Upload the LOA and the most recent carrier bill.

Click **Submit**. You'll get a port request ID. Track its status from the same page.

Lifecycle of a port

Status	What it means	Typical duration
PENDING	We've received your submission, not yet sent to carrier	Hours
SUBMITTED	Sent to losing carrier	1-3 business days
FOC_RECEIVED	Carrier confirmed and provided a Firm Order Commit date — the date the number actually moves	1-3 business days after submission
COMPLETED	Number is now on our network. Calls flowing through us.	On the FOC date
REJECTED	Carrier rejected the port. Reason in the notes. Most common: account info mismatch.	Same day as rejection
CANCELLED	You or the customer cancelled before completion	n/a

Total elapsed time from submission to completion: **5-30 business days**, with 10-15 being typical for a single number from a major carrier.

Common rejection reasons

Reason	Fix
Account holder name doesn't match	Get the exact name from the carrier bill
Service address doesn't match	Same — copy from the bill verbatim
Account in pending order with current carrier	Customer needs to wait for the pending order to complete or cancel it
Account is part of a multi-line account that hasn't been split	Customer needs to "spinoff" their number from the parent account first
LOA not signed by authorized party	Get a new LOA signed by the actual account owner
Account requires PIN we don't have	Customer gets it from current carrier

When rejected, the port request stays open. Fix the issue, click **Resubmit**, and the port re-enters the workflow. You don't have to start over.

Porting out

Sometimes a tenant leaves your platform and wants to take their numbers. Don't fight this — it's their right under the law, and being difficult about it makes you a bad actor.

When a tenant tells you they're porting out:

1. Provide the new carrier with the customer's account info (their account = your tenant's account on your platform)
2. Provide the PIN if you have one set; otherwise their account number is usually enough
3. Don't release the DID before the port completes — releasing prematurely will fail the port
4. Once the port completes, the DID returns to your inventory automatically (or you can reassign it)

Customers who port out and have a smooth experience often come back when their next provider lets them down. Burning the relationship guarantees they won't.

Practical tips

- **Order phone numbers in batches.** Most ports are bundles of 5-50 numbers. Get all the info upfront for the whole bundle.
- **Set FOC dates 2 weeks out minimum.** Avoid Mondays and Fridays. Avoid the week after a holiday.
- **Tell the customer about the cutover.** On FOC date, calls move from old carrier to new — there can be a 5-30 minute window where calls might be missed during the routing flip.
- **Don't promise a port date until you have a FOC.** "Hoping for next Tuesday" is fine; "your numbers will move next Tuesday" is a problem if the carrier takes longer.

Carrier-specific quirks

- **Verizon Wireless** — slow. Allow 4-6 weeks. They demand precise account info.
- **AT&T** — moderate speed. Account PIN is mandatory.
- **Comcast/Spectrum business** — moderate. Requires exact service address match.
- **RingCentral / 8x8 / Vonage** — fast. They're VoIP carriers, used to porting numbers out.
- **Small local CLECs** — variable. Some are fast and reasonable; some require paper LOAs and faxes (yes, in 2026).

For multi-carrier complications, open a support ticket. We've seen most edge cases.

Appendix C — E911 Compliance

Why this matters

When someone dials 911 from a phone on your platform, the platform routes the call to the right Public Safety Answering Point (PSAP) based on the registered service address for that number. Two pieces of US federal law govern this:

- **Kari's Law (2020)** — multi-line phone systems must allow direct 911 dialing without a prefix code (e.g., dialing 911, not 9-911). The platform handles this automatically; you don't configure anything.
- **Ray Baum's Act (2021)** — every phone number capable of dialing 911 must have a "dispatchable location" registered. A dispatchable location is more than a city/state — it's a street address, often including suite/floor information, that 911 can dispatch responders to.

Non-compliance is a federal violation. FCC fines can reach **$10,000 per violation per day**.

What you have to do

For every DID assigned to a tenant:

- A **valid, current physical street address** in the US
- That address must be **registered** with the platform (which we then submit to the 911 routing database)
- Address must be **updated** when the tenant moves locations or changes the physical site for any number

For multi-location tenants: each location's DIDs must have that location's address. A 5-office company with 50 DIDs split across 5 buildings = 50 DIDs configured with 5 different addresses.

Where to register addresses

Two places, depending on workflow:

Per-DID, in the DID Inventory

Numbers ’ **DID Inventory** ’ click **Edit** on a DID ’ fill the E911 section ’ save.

Use this when you're setting up DIDs one or two at a time.

Bulk via "Apply to All"

Numbers ’ **DID Inventory** ’ select multiple DIDs (checkboxes) ’ **Bulk E911 Update** ’ enter one address ’ confirm.

Use this when a tenant gets a batch of 20 numbers all for the same office.

From the partner-level E911 page

Settings ’ **E911** (in some menu layouts; alternately under Numbers menu).

Shows every DID's E911 status across all your tenants. Filter by "Not Set" to find non-compliant numbers quickly. Critical to check this regularly.

E911 statuses

- **Registered** — address is on file and active. 911 calls will route correctly.
- **Pending** — address submitted, waiting for the 911 database to confirm. Usually clears within 1 hour. During this window, calls still try to route but may fail.
- **Failed** — address didn't validate. Usually a typo or a non-existent address. Fix the address and re-save.
- **Not Set** — no address on file. **911 calls from this number will fail.** This is the dangerous one.

What a "valid" address looks like

- Real US street address with a building number
- Real city / state / ZIP
-

For commercial buildings: include suite number, floor, or unit. "1234 Main St, Suite 200, Anytown, AR 72211" is much better than "1234 Main St, Anytown, AR 72211" because dispatchers can find the right floor.

- **PO Boxes don't work.** PSAPs can't dispatch to a PO Box.
- **Virtual offices and registered agents don't work.** The address must be where someone actually is when they call 911.
- **No commas or special characters in city.** Use "Saint Louis" not "St. Louis"; use "OFallon" not "O'Fallon" (some PSAPs reject the apostrophe).

What happens on a 911 call

1. Caller on a registered DID dials 911 from a softphone or desk phone
2. Platform recognizes the call and routes it to the 911 service provider
3. 911 service provider looks up the dispatchable location associated with that DID
4. Call connects to the PSAP that serves that location
5. Caller's name (CNAM) and address are displayed to the 911 dispatcher

If the DID isn't registered, the call fails or routes to a national emergency line that asks the caller for their address — defeating the purpose of E911.

What happens on a 911 call from a non-registered number

The call may:

- Fail outright (silent — caller hears nothing, or just dial tone, or "all circuits busy")
- Route to a default location (often your platform's default, which is wrong for the actual caller)
- Reach a PSAP but in the wrong jurisdiction (delays response)

Any of these can be life-threatening. Take this seriously.

Multi-location tenants

If your tenant has multiple sites:

- Each DID's E911 address should match the physical location where calls from that DID actually originate
- For mobile workers (softphones used from home), use the worker's home address
- For traveling workers, use the tenant's primary office address as a default — and tell the worker to use a real cellular phone for emergencies (not the softphone)

For tenants who are spread out, consider asking them to assign a "home DID" per worker so each worker's outbound caller ID is consistent and the E911 address matches their actual location.

Updating addresses when tenants move

When a tenant moves offices:

1. Get the new address from them
2. Bulk-update all their DIDs to the new address (DID Inventory ’ multi-select ’ Bulk E911 Update)
3. Verify status flips back to "Registered" within an hour
4. Notify the tenant the migration is complete

Don't forget. Old address means 911 dispatched to an empty office.

Emergency relocation indicator

Some softphones and desk phones support a "current location" indicator that overrides the registered DID location for the current call. Useful when a worker travels with their softphone. Configuration is per-phone-model and outside the scope of this manual — see your phone's documentation.

Where to get more information

- **FCC E911 page** — https://www.fcc.gov/general/9-1-1-and-e9-1-1-services

- **FCC Kari's Law overview** — https://www.fcc.gov/mlts-911-requirements
- **FCC Ray Baum's Act overview** — https://www.fcc.gov/multi-line-telephone-systems-mlts-direct-9-1-1-dialing

When in doubt, register the address. The penalty for over-registering is zero. The penalty for under-registering is potentially fatal.

Appendix D — Suggested Support Workflow

What this appendix is

A suggested support workflow you can adopt or adapt. You're going to get tickets from your tenants — having a process means you handle them faster, look more professional, and burn out less.

Tier your support

Three tiers serve most partners well:

Tier 1 — Front-line

- Answers basic questions ("how do I add an extension?")
- Resets passwords and PINs
- Walks customers through self-service tasks
- Escalates anything they can't solve in 15 minutes

Skill required: comfortable in the dashboard. Doesn't need to know SIP internals.

Tier 2 — Technical

- Diagnoses call quality issues (codec mismatch, RTP packet loss)
- Investigates one-off failed calls (CDR analysis, SIP trace review)
- Configures complex call flows for tenants
- Escalates platform-level bugs to us

Skill required: understands SIP, can read a CDR, can use the call recording / transcription features for diagnosis.

Tier 3 — Engineering / vendor

- That's us. You file a ticket; we triage and respond.

Most small partners run with one or two people doing Tier 1+2. Don't worry about formal tiers — just understand which type of issue you're handling.

Your support intake channels

Pick one or two; don't spread yourself thin:

Channel	Pros	Cons
Email	Async, reliable, has a paper trail	Slow, hard to track at volume
Helpdesk software (Zendesk, Help Scout, Freshdesk)	Tracking, SLAs, reporting	Subscription cost, learning curve
In-platform tickets	Customers raise tickets from inside their dashboard	Requires you to build the UI/integration
Phone	High customer satisfaction	Doesn't scale, no record by default
Chat (Intercom, etc.)	Fast, modern feel	Always on, hard to staff after hours

Recommendation for new partners: start with **email + a public knowledge base**. Move to a helpdesk system once volume justifies it (~50+ tickets/month).

Response time targets

Industry-standard SLAs for B2B phone service:

Severity	Definition	Response	Resolution
Critical	Service down, multiple users affected	< 15 min	< 4 hours
High	Service degraded, single user affected	< 1 hour	< 24 hours
Normal	Bug or question, no service impact	< 4 hours	< 3 business days
Low	Feature request, minor cosmetic issue	< 1 business day	best effort

Set these in writing, communicate them to tenants, and measure yourself against them. Customers will forgive an outage; they won't forgive being ignored.

Self-service first

The cheapest support ticket is the one your customer never files. Invest in:

- **A knowledge base** — articles for the top 20 questions. Search-friendly. SEO-friendly so your customers find them on Google before they email you.
- **In-product hints** — tooltips, helper text on form fields, links from common error messages to relevant KB articles.
- **Status page** — when there's an outage, customers check the status page first (if you've set the expectation that you have one). Saves you 100 individual "is your platform down?" emails.
- **This manual!** — your tenants already get a white-label version. Link to it from your welcome email. Update it when features change.

Goal: 80% of customer questions answered without a ticket. The other 20% are real issues you should focus on.

Common issues and the playbooks

"I can't make outbound calls"

Diagnostic order:

1. Are they registered? Check the Extensions list in their tenant; status should be online.
2. Are they trying to dial a valid number? Some carriers block calls to certain country codes.
3. Are they over their usage cap? Check their limits.
4. Is their wallet exhausted? Check billing status.
5. If all the above are fine, check the CDR. If a call attempt was logged with hangup cause `NO_ROUTE` or similar, that's a routing issue — escalate to us.

"My voicemail isn't being delivered to email"

Check:

1. Voicemail box has emails configured (Voicemail page ’ Edit box)
2. "Email Attach" is on if they want the audio file
3. Their email isn't blocking platform email (check spam folder; check for SPF/DKIM issues if their IT is strict)

"Caller ID name is showing as the number, not our company name"

CNAM hasn't propagated yet. Caching in the national CNAM database takes 24-48 hours. Set the CNAM, wait, ask them to test again.

If still wrong after 48 hours, check the DID's CNAM Sync Status (DID Inventory). If "Failed", the CNAM may have been rejected (too long, special characters, profanity). Try a shorter version.

"Phone won't register"

Check:

1. SIP credentials are correct (extension number, password, server)
2.

   Phone is on a network that allows outbound SIP (port 5060 UDP is common; some firewalls block it)

3. Phone firmware is up to date
4. Try a softphone with the same credentials — if softphone works, phone-side issue
5. If softphone also fails, escalate to us with the SIP credentials and the calling IP

"I want to port a number to your service"

Send them the LOA template (see Appendix B). Once you have signed LOA + carrier bill + account info, file the port from your dashboard. Set expectations: 2-4 weeks total.

"I want to port my number away"

Don't make this hard. Help them. They'll come back later.

Tracking metrics

The bare minimum to track:

- Tickets per week
- Average first-response time
- Average resolution time
- Customer-satisfaction score (post-ticket survey: "On a scale of 1-5, how satisfied with this resolution?")

Most helpdesk software does this automatically. If you're using email, do it manually.

If you're seeing the same issue from multiple tenants, that's a documentation problem, a UX problem, or a bug. Address the root cause; don't just answer the same ticket 20 times.

After-hours support

Most B2B phone customers expect 24/7 support. You don't have to actually staff 24/7 — you have to *appear* to be reachable.

Options:

- **Auto-responder + escalation** — autoresponder explains business hours, gives an emergency-only number for critical outages
- **On-call rotation** — you and a partner alternate weeks
- **Outsourced after-hours** — services like Smith.ai handle off-hours triage

Whatever you pick, document it. Tell customers what to expect at 2am Sunday so they're not disappointed.

Appendix E — Glossary

ACD (Automatic Call Distribution) — A system that routes incoming calls to a group of agents based on rules (round-robin, longest idle, fewest calls, etc.). The Queue feature in this platform is an ACD.

API (Application Programming Interface) — A way for other software to talk to the platform. Used for automation, integrations, and building custom interfaces.

ARPU (Average Revenue Per User) — Total revenue divided by active customer count. A key SaaS metric.

Asterisk — Open-source telephony software that powers the call-handling layer of this platform. You don't interact with Asterisk directly; the dashboard is the interface to it.

BLF (Busy Lamp Field) — A button on a desk phone that lights up to show whether another extension is busy, ringing, or idle.

CCaaS (Contact Center as a Service) — A category of software for running customer support / sales call centers in the cloud. The Queue + Campaign features overlap with CCaaS.

CDR (Call Detail Record) — A log entry for a phone call. Contains caller, callee, duration, billable seconds, hangup cause, and other metadata. Used for billing and reporting.

CNAM (Caller Name) — The name displayed on a recipient's phone when they receive a call. "ACME PLUMBING" instead of just a number. Set per-DID.

Codec — Algorithm for encoding/decoding audio. Common voice codecs: G.711 (high quality, more bandwidth), G.729 (lower bandwidth, slight quality loss), Opus (modern, used by softphones).

DID (Direct Inward Dial) — A phone number that rings into the platform. Bought from carriers, assigned to tenants, routed to extensions/queues/call flows.

DKIM, DMARC, SPF — Email authentication standards. Reduce spam-filter rejections of email sent from your brand domain.

Dialplan — The set of rules Asterisk uses to decide what to do with a call. Generated from your tenant's call flows automatically.

E911 (Enhanced 911) — The emergency number system that requires every phone number to have a registered street address for dispatching responders. Federally mandated.

Extension — A short internal number (e.g., 101, 502) that rings a specific phone or user within a tenant. Each extension has SIP credentials and can be configured for voicemail, FMFM, etc.

FMFM (Find Me, Follow Me) — A feature that rings multiple destinations (extension + cell phone + home phone) when a call comes in, until one is answered.

FOC (Firm Order Commit) — The date a phone-number port is scheduled to actually move from one carrier to another.

HD Voice — Audio quality higher than traditional phone networks (G.722 / Opus codecs). Sounds noticeably clearer.

IVR (Interactive Voice Response) — The "press 1 for sales, press 2 for support" menu callers hear. Built using Call Flows in this platform.

LOA (Letter of Authorization) — A signed document authorizing a carrier to take over a phone number from another carrier. Required for porting.

MOH (Music On Hold) — Audio played to callers waiting in a queue or on hold.

MRR (Monthly Recurring Revenue) — Sum of all your customers' monthly subscription fees. The headline SaaS metric.

MOS (Mean Opinion Score) — A 1-5 rating of voice call quality. Above 4.0 is good.

NAT (Network Address Translation) — A networking concept that affects whether VoIP traffic can flow through a firewall. Misconfigured NAT is the #1 cause of one-way audio.

NPA / NXX — Telephone numbering plan terms. NPA is the area code (501); NXX is the next three digits (555).

PBX (Private Branch Exchange) — A telephone system internal to a company. Cloud-based PBX = this platform.

PJSIP — A SIP stack used inside Asterisk. The newer of two stacks (chan_sip is older, deprecated).

PSAP (Public Safety Answering Point) — A 911 call center. Different jurisdictions have different PSAPs.

Rate Center — A geographic area used for telephone-number routing and pricing. Numbers within the same rate center can usually call each other as a "local" call.

RTP (Real-time Transport Protocol) — The protocol that carries voice audio between endpoints during a call. SIP sets up the call; RTP carries the audio.

SIP (Session Initiation Protocol) — The signaling protocol used for VoIP calls. Sets up, tears down, and modifies calls. Doesn't carry the audio (RTP does that).

SIP Trunk — A virtual connection from a PBX to a phone-number provider (carrier). The platform manages SIP trunks for you.

Softphone — A software application that runs on a computer or phone and acts as a phone (Zoiper, Linphone, native apps). Uses SIP to connect to the platform.

STIR/SHAKEN — A caller-ID authentication framework designed to reduce robocalls. Inbound calls now arrive with an "attestation" indicating how confident the carrier is in the caller ID.

TCPA (Telephone Consumer Protection Act) — US law restricting unsolicited calls/texts. If you do outbound campaigns, you need to comply or face large fines.

Tenant — One of your customer accounts on the platform. Has its own extensions, DIDs, users, voicemail, etc.

Toll-Free Number — Phone numbers in 800/833/844/855/866/877/888 area codes. Free for callers; you pay per inbound minute.

Trunk — Same as SIP Trunk above.

TTS (Text-to-Speech) — Generating an audio file from typed text. Used for voicemail greetings and IVR prompts.

Voicemail-to-Email — Voicemail messages delivered as audio attachments in email, instead of (or in addition to) being available via dial-in.

Wallet — Your prepaid balance with the platform. Funds are drawn down by usage (extensions, DIDs, minutes).

Webhook — An HTTP request the platform sends to your server when something happens (tenant created, call ended, payment failed). Used for real-time integrations.

White-label — Selling our platform under your brand. Your customers see your name and logo, not ours.