Service Provider Templates

This page contains instructions on how you can configure a service provider account using templates.

Overview

Service provider templates come very in handy if you need to add several similar service provider accounts to the system. Instead of configuring the service provider's roles in each and every case, you can use a template.

Service provider templates can only be managed by the system administrator(s)! If there are parameters that do not meet your requirements, you may simply edit the template or create a whole new one.

To manage service provider templates, go to **Unified Communications** in the side menu and click the <u>Service Provider Templates</u> icon in the **Assets** area. The **Service Provider Templates** management page allows you to:

- create a new template
- see a list of all existing service provider templates
- search for a particular template within the list
- edit templates
- remove unused templates

Add a template

To add a template:

1. Click on the <u>Add Template</u> icon in the **Tools** area.
2. Name the template.
3. Set account permissions. More details on permissions **here**.
4. Set account limits. More details on limits **here**.
5. Assign a charging plan to the account from the drop-down list. The list contains all the charging plans available in the administrator account.
6. Click **OK** to add the new service provider template. To return to the previous page without adding anything, click **Cancel**.

If you want to edit a template, follow the same steps described above.

Please note that the Charging plan only appears if charging is enabled on the VoipNow system. To enable/disable charging, go to the **Unified Communications Settings Zero Priority Charging** page.

Enable or disable a template

All templates are listed in the **Service Provider Templates** table. You may enable or disable a specific template with a simple click on the **S** (Status) icon,

which shows the status of the template: ✅ for enabled ❌ for disabled. Once a template is disabled, you can no longer use it to create an account.

Search for a template

The same table displays a **Template ID** column, which refers to the automatically generated ID of the template. The **Service Providers** column indicates the number of service provider accounts created based on this template.

To filter existing templates, enter the name in the text box above the table and click the 🔍 **Search** button. The system remembers the search criteria when a new search is performed and even after the user logs out.

Remove a template

If you remove a template from the system, the accounts created with it will not be affected.

To remove a template:

1. Select the template from the table and click the <u>Remove selected</u> link on top of the table.
2. Select the **Confirm removal** checkbox and click **OK**. To return to the previous page without removing the template, click **Cancel**.

Related topics
Add a service provider account

[Manage a service provider's roles](#)