JeraSoft Billing 3.10

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JeraSoft is excited to announce the new major release of JeraSoft VCS 3.10 billing platform version.

This page is a guided tour of the system's highlights, recommendations, useful additions. Typically, this major release includes all minor releases in-between (from 3.9.1 to 3.10.2). And this document digs into numerous changes of these minor versions and provides information regarding its usage.

Privacy and Security

Our team is focused on taking reasonable care of our customers' privacy and security. Hence, we provide the steps to ensure it. Please perform the following checks:

Please perform the following checks: ∕∧

- The existence of local user "jerasupport";
- ٠ The resolvability of a.jerasoft.net by DNS;
- The SSH ports should only be opened for Trusted / Extended networks. ٠
- The ports tcp/5432, tcp/6379 should be only opened between billing servers if you have several.

Note, that if the above conditions are not met, web system access will be blocked.

Screenshot: "JeraSoft VCS Login page"



VoIP Gateway Integration

We are delighted to announce that JeraSoft VCS has been successfully and completely integrated with Cataleya Orchid One. This consolidation creates a stable, well-tested and carrier-suitable solution for users.

😻 cataleya

Now, your billing platform can function with Cataleya Orchid One session and application manager. This integration is critical to achieving fully functional Call billing via CDR (SDR) files, Dynamic Routing (SIP) and Authorization over SIP Redirect with Cataleya Orchid One solution.

You can find the instruction for configuration in our Integration Manual.

General System Changes

Management section

Clients

- 1. Starting from the 3.9.1 version, *Factors Watcher block* notifications became optional, you can enable or disable a respective check box in the *Cli* ent form.
- The "Postpaid" check box appeared in the Clients form. It is disabled by default. If you enable the postpaid mode, the client has unlimited credit.
 From now on, the "Orig Group" option is available in the Client Info form. And you can override Orig Group values from all accounts assigned to the client.
- 4. There are "Threshold" and "Capacity" boxes in the Low Balance Control sub-panel of the Client Info form. These settings allow to configure a balance limit and enter the capacity of the channel. When the balance is below mentioned in the "Threshold" field, the system applies special capacity settings

Screenshot: Clients settings

SYSTEM INFORMATION		ORIGINATOR SETTINGS	COMPANY INFO
Name:		Postpaid: 🗹 0 USD	Name:
Reseller:	Scompany ROOT	Payment Terms:	Main E-mail:
Currency:	USD 🔻	Rate Table:	NOC E-mail:
Timezone:	default (UTC)	Routing Plan:	1 Notify about Factor Watcher blocks
Status:	Active	3 Orig Groups:	Billing E-mail:
Client's Template:		Capacity: channels	Rates E-mail:
Groups:	· · · · · · · · · · · · · · · · · · ·		Address:
Tax Profile:	· · · · · · · · · · · · · · · · · · ·	LOW BALANCE CONTROL	
Bill Calls by:	disconnect time 💌	Notify Client: USD Notify Admin: USD	
	Hidden Numbers	Threshold: USD Capacity: channels	
CLIENT PANEL		4 Channels	
Login:		AUTOINVOICING	Tax ID:
Password:		Template:	Reg ID:
Access:		Last Invoiced:	Account Details:
		RATE NOTIFICATION	
TERMINATOR SETTING	s	Format: Excel CSV	
Rate Table:	· · · · · · · · · · · · · · · · · · ·		
Capacity:	channels	Notify type: All rates	4
		AUTO PAYMENT	Locale:
		Extra Amount: 0 USD	
			OK Cancel Apply

Client's Templates

The Client's Templates tab is upgraded. There are a new interface and functional properties. Please see the Client's Templates page for more details.

Screenshot: Client's Template tab

Management	Retail	Statistics	Tools	Routing	Configuration	Syste
Clients	🔊 C	1				

Tip: If you do not specify the values (*i.e Groups, Credit, Rate Table, Routing Plan, Orig Groups, Capacity, Notify Client, Notify Admin*) in the Clie nt Info form, the Client's Templates allow to take the following values from templates (that is during authorization).

But these values will not be shown in the Client Info form.

For example, when there are no values in the *Client Info* form, the system takes them from assigned template. When there are no values in the template assigned to the Client, they are taken from *Manager/Reseller's settings*.

Now the *Manager/Reseller* can set the *Client's Template* in *Reseller section*. Therefore, this template will be used under this Reseller or Manager by default.

All you need to do:

- go to Reseller section and select the needed Manager/Reseller (a configuration window will pop-up);
- fill out the Clients Template field by selecting a template from the drop-down list.

Also, you can assign the Routing Plan in the Client's Templates. The Routing Plan field is removed from the Reseller's Settings

Please note, that several fields such as *Bill calls by, Client's package name, Access of the Client Panel* have been removed by architectural considerations.

Screenshot: Clients form

🚨 Clients							
SYSTEM INFORMATION		ORIGINATOR SETTINGS		LOW BALANCE CONTROL			
Name:		Credit:	0 USD	Notify Client:	USD	Notify Admin:	USD
Reseller:	🚨 AC 🔍	Rate Table:	_	Threshold:	USD	Capacity:	Channels
Currency:	USD	Routing Plan:	▼				
Groups:		Orig Groups:	▼				
		Capacity:	Channels				
						OK Cancel	Apply

The values overridden from templates are only displayed in the *Client list*, for example, *Routing Plan, Rate Table, Credit.* They will not be shown in the Client's account.

Functional properties of the Clients Templates:

- If there are no specified values (such as Groups, Credit, Rate Table, Routing Plan, Orig Groups, Capacity, Notify Client, Notify Admin) in the Client Info form, it overrides these values from the closest template.
- The closest template is considered a first template that is found in the following chain: Client his Manager his Reseller.
- If there are no found values mentioned above in the closest template, a further search stops and values are not defined.
 When you delete the template, there is a remove validation. The pop-up window with notification will appear. This template shouldn't be in usage by Client, Manager or Reseller.



- Now the Routing Plans and Rate Tables sections have the same drop-down list of available templates for the Client/Reseller.
- The change of the Reseller proceeds without any checks of application of this template by the Client/Manager/Reseller.
- The currency in the Client's Template and the currency of the customer to which it applies should be the same to work properly.
- All Managers, regardless of a nesting level, have an access to the full list of templates that only belong to their Reseller.

Rate Tables

The"*Extra Rate*" tab is modified and the calls within the assigned package will not be charged by "extra cost". Otherwise, the system bills a call with extra rate when the customer overcomes the limits of the assigned package or call destinations that are not included in the client's package.

⚠	Please note, that the "Extra rate" could only be applied to extra minutes of the call, that are not included in the package.

Screenshot: Extra tab - Rate Tables

📄 Rates 🛛 💽 Extra 📄 🕨 Simulate 🔹 Σ Rate Formulas	🗐 Import 🛛 🚯 Export 🛛 💊 Parameters	New [USD]
G Add Rate		
Orig Groups	Profile	Extra Rate
	all time 🔹	0,5 🗰
	ОК	Cancel Apply

When you choose "Alert me about duplicates" in the "On duplicate rates" field in the Rate Tables section, please be aware there is a limitation of the alerts of rate duplication in the list while importing. It means that the import process cannot proceed if you get more than 1 000 duplicate alerts.

Rates Ex	tra 🜔 Sim	ulate	Σ Rate Formulas	🖅 Import	Export	📏 Paran	ieters			#1 - Ter	minatior	I [USD]
FILE PROCESS												
Select f	file to import: C	hoose l	File No file chosen									
Fie	elds Delimiter: aut	todetec	t 💌									
IMPORT PROCESS											s »	
	Rate Group: De	fault		-	Imp	ort templat	e:					
	Date Format: aut	to	▼ auto		Deck u	pdate mod	e: Do not i	Do not import anything to code deck				
Custom	Custom date format:					Code dec	c: CodeDec	CodeDecks 💌				
On du	uplicate rates: Ale	bout duplicates	-		On error	s: Import o	Import correct rows and show all found ε \checkmark					
Fu	Ill A-Z import: 🗌				Notificato	r Code Dec	k ▼					
						onfirm mod						
IMPORT HISTORY (LAST					Op	timize code	5:					
	IN OKT OF EKKT	10113 /				Rows 1 -	1 of 1	₩ 20 ▼	« <	Page 1 (of 1 >	>>
Date	Login	File			New	Increased	Decreased	Unchanged	Pending	Closed	Total	
2016-02-02 10:16:41+00	stest	•	rates-generatetermrate-201602	202.csv	21816	0	0	0	0	0	21816	5
10.10.41+00											Cl	ose

Screenshot: Import tab - Rate Tables

Invoices

Additional option "*Group*" of the search-filter is implemented in the *Invoices* section. You can select multiple clients' groups in search-filter in the *Invoices*. To access it, click the down arrow on the *quick search toolbar*.

The variable **{total_cost_gross_text}** appears in the *pdf* **invoice template**. Use it for the text representation of the total sum for all charges. For correct functioning of the {total_cost_gross_text} parameter, the currency names should correspond to the official ISO 4217 standard, i.e. EUR, USD, CAD.

Moreover, there is a new variable {to_pay}, i.e the payable sum for specified invoice in the Financial Summary of invoices.

Also, it is possible to **arrange packages by numbers** in *Invoices* and *Invoices Templates*. While generating invoices, the system sorts packages in invoices. The package names could contain numerical symbols. Please use numerical symbols as 001 name, 002 name, etc. in names of the packages. And avoid special symbols as %001 name, -001 name.

Please note, that the currency rate of extra charges will be taken on the date of charge, not on the date of invoicing.

Transactions

Now the "Import Transactions" process is divided into two steps:

a) Select the file and specify additional parameters.

Screenshot: Transactions importing process. Step 1

Transactions		
SELECT FILE (STEP 1 OF 3)	DEFAULT VALUES	
Select file to import: Choose File No file chosen	Transaction Date:	2016-02-25 00:00:00+0000
	Currency:	USD 🔻
	Payment Account:	General
	Date Format:	Auto
	Time Format:	Auto
		Close Process

b) Recognize the file. The system recognizes the file and you can make changes of data (for instance, switch columns) and click "Process>> again.

Screenshot: Transactions importing process. Step 2

-		-	-	-	-			-	-	-		-	-	-	-	-	-	Skip
ID	Transaction	Date	Client	Client Info	ler	Туре	Amount	Taxes	amount	Currency	Comments	Status						
38765	06/30/2015	16:11:56	300	Amount		Charge:	Products	0	0	TEA	Package	periodical	payment:	10\$	included	taxes	approved	
38764	06/30/2015	16:11:56	300	Description		Charge:	Products	0	0	TEA	Package	activation	payment:	10\$	included	taxes	approved	
38763	06/30/2015	16:11:28	300	Transactio	n Date	Charge:	Products	0	0	TEA	Package	periodical	payment:	10\$	included	taxes	approved	
38762	06/30/2015	16:11:28	300	Customer	А	arge:	Products	0	0	TEA	Package	activation	payment:	10\$	included	taxes	approved	
38761	06/30/2015	16:10:05	300	Customer	А	Charge	Products	0	0	TEA	Package	periodical	payment:	10\$	included	taxes	approved	
38760	06/30/2015	16:10:05	300	Customer	А	Charge:	oducts	0	0	TEA	Package	activation	payment:	10\$	included	taxes	approved	
38759	06/30/2015	16:09:40	300	Customer	А	Charge:	Products	0	0	TEA	Package	periodical	payment:	10\$	included	taxes	approved	
38758	06/30/2015	16:09:40	300	Customer	А	Charge:	Products	0	0	TEA	Package	activation	payment:	10\$	included	taxes	approved	
38757	06/30/2015	16:09:26	300	Customer	А	Charge:	Products	0	0	TEA	Package	periodical	payment:	Test1	approved			
38756	06/30/2015	16:09:26	300	Customer	А	Charge:	Products	0	0	TEA	Package	activation	payment:	Test1	approved			
38755	06/30/2015	16:09:09	300	Customer	А	Charge:	Products	0	0	TEA	Package	periodical	payment:	Test1	approved			
38754	06/30/2015	16:09:09	300	Customer	A	Charge:	Products	0	0	TEA	Package	activation	payment:	Test1	approved			
38753	06/30/2015	16:07:53	300	Customer	А	Charge:	Products	0	0	TEA	Package	periodical	payment:	Test1	approved			
38752	06/30/2015	16:07:53	300	Customer	А	Charge:	Products	0	0	TEA	Package	activation	payment:	Test1	approved			
38751	06/30/2015	16:07:13	300	Customer	А	Charge:	Products	0	0	TEA	Package	periodical	payment:	Test1	approved			
38750	06/30/2015	16:07:13	300	Customer	Α	Charge:	Products	0	0	TEA	Package	activation	payment:	Test1	approved			0

1. The taxation option is accessible in the Transactions. It allows to set an amount and choose whether a specified amount includes a tax or not.

Client:	
Amount: O USD V No taxes Payment Account: General Include taxes Exclude taxes	Type: Payment *
2 Info: Transaction Date: 2016-01-26 13:48:37+0000	Status: Approved

If you choose "Include taxes" option, the system calculates taxes and divide the total amount into 2 columns (Amount/Taxes amount). Then, the system changes the option "Include taxes" to "Exclude taxes" in the settings of a respective transaction.

2. There is a new "Info" field in the Transactions form. Now, the user can add system information for Transactions and variables in the Invoices Templates.

3. As well as, the "Payment Account" option is modified and there are Extra Charges Outgoing/Incoming.

Please note, that you will have the same type of payment account in invoices. Therefore, you can choose an outgoing or incoming invoice. The following charge will be shown in this invoice.

If you need to give a refund to the client, select an extra charges outgoing, it will guarantee that this charge will be visible in the invoice.

Screenshot: Transactions form

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Transactions		
Client: [
Amount:	0 USD v No taxes v	Type: Charge
	Extra Charges Outgoing	
Comments: Info:	Extra Charges Outpoing Extra Charges Incoming	
Transaction Date: [2016-01-26 13:53:14+0000	Status: Approved CK Cancel Apply

(i) To quickly open the *Client Info* from the list of all transactions, click the name in the column *Client / Reseller*.

Screenshot: Transactions list

ID	A V		Payment Account	Client	/ Reseller	- A	Amount 🗍	Taxes amount 🗍	Comments #		Transaction Date	× V
	1112	۲	Charge: Products	8			-45.00 USD	0.00 USD	Package periodical payment: :	¥	12/10/2015 10:09:01 +0000	*
	1111	۲	Charge: Products	80	test1		0.00 USD	0.00 USD	Package periodical payment: Limits	V	12/10/2015 10:09:01 +0000	*

For a faster generation of the transaction list, we changed the default value of the Group Charges from Daily to Hourly. So, now it is Hourly by default.

To open the advanced search settings click the drop-down arrow vin the Search toolbar in the *Transactions*.

Screenshot: Transactions Section/ Advanced Search toolbar

	Search	P	٥
Client:			
Payment Account:			-
Type:			-
Status:			-
Date:			
Group Charges:	Hourly		-
	Reset	Searc	:h

Balance Report

A new structure of the reports is implemented and the Balance Report section is updated respectively.

From now on, this section has a **new form of queries**. It allows creating useful analysis reports more painless and easily choose parameters that should be summarized, group data. The similar form is presented in the Summary Report, Orig-Term Reports, etc. Please refer to the article "**Balance Report**" in our User Guide to learn how you can execute new queries.

Screenshot: Balance Report section

Balance Report		
FILTERS 🗘		OUTPUT COLUMNS (12)
Interval:	This Month v 2016-01-01 00:00:00 - 2016-01-31 23:59:59 UTC v	Type: Web 💌 Grouped 💌
Mode:	Accountant 👻	
Client Type:	Client 💌	Currency: USD 💌
Group By:	v	
Save Query		Query

Client packages

We improved the user interface and relocated the *Client Packages*. Now, it's a separate section of the system. To open it, point to the *Management, and* th en click the *Client Packages*. Here you can see the full list of all packages, assign them to respective Clients or Accounts.

Please note, that the *API method* of workflow process of the *Client Packages* is changed. Therefore, you need to modify the API method to work with packages. You can check modifications in the **System - API Testbed**.

Management Retail	Statistics	Tools	Routing	Configuration	System	8	3	٩	۲	K,	G.	
🚨 Clients												
Accounts												
Rate Tables												
📄 Invoices												
📑 Transactions												
🛐 Balance Report												
💩 Resellers												
4 Client Packages												

Screenshot: Client Packages section

From now on, you can also assign packages to the Resellers in this section.

As we continue to evaluate the design of our system interface and we changed the view of the "Volume Limits" and added separate column "Timezone" in the Client Packages section.

Screenshot: Client Packages settings

e	Client Packages								Se	earch			۵ ۷
0	Assign Package							Rows 1 -	20 of 21 🗮 20 🔻	v « « Pag	ge 1 of 2	>	*
Å	Client	×	Account	Package	🔶 🗘 🗘 Volur	me Limits		Start Date 🍦	Expire Date	Timezone			
•	💩 orig_1	٨		All routes		1 1* 2* 3 3*	0:50:00 0:10:00 0:50:00 0:10:00 0:50:00 0:50:00 0:10:00	01/20/2016 14:01	02/20/2016 14:00	GMT+2	\	C	*
\bigcirc	arig_1	- E		Free				01/20/2016 14:31	02/20/2016 14:00	GMT+2	N	0	*
Θ	OrigClient	(3)		789		789	10.00 USD	01/29/2016 18:09	02/29/2016 18:00	GMT+2		0	*

Now the Volume Limits bar graphical displays the data.

1. On the left side of the bar, it shows the destinations, code or code names.

2. On the right side, it shows a specified limit (see screenshot below).

Screenshot: Client Packages settings/ Volume Limits bar

Volume Limits	
1,1	0:50:00 2
2	0:50:00
2*	0:10:00
3	0:50:00
3*	0:10:00

Also, there is a possibility to edit the "Deal End Date" in the Client Packages. Click the icon "Edit Client Package"



in the full list of existing client packages. The view of the Client Packages edit form is modified

due to the changes of the Volume Limits.

Screenshot: "Client Packages" edit form

4 Client Packages			
SYSTEM INFORMATION			
Client: Sorig_1 Account: All Accounts Package: All routes		Needs ch	Status: Active harging: No valions: 1
Deal Start Date: 01/20/2016 14:01:15 +0200 Deal End Date: VOLUME LIMITS		Recalculate to	
Code / Code Name	Limit	Used	Progress
1	0:50:00	0:50:00	
1*	0:10:00	0:10:00	
2	0:50:00	0:31:14	
2*	0:10:00	0:00:00	
3	0:50:00	0:07:11	
3*	0:10:00	0:00:00	
			OK Cancel Apply

In the previous version, the system didn't allow to assign the package with an expired date. And the following error was shown by the system:

Activation\Deactivation date was changed and is older than present date.

Now, it is possible to *assign a backdating package* in the *Client Packages*. In order to update the deal end date of the package you need to change it in the Client Package settings and then restart the Package Manager.

① You should run the Package Manager several times until the current period of the package or its end date.	
(i) When you edit the "Deal End Date" field of already assigned package, transactions will not remain unchanged.	

If you click the delete icon **\$** (i.e. **remove an archived package entirely**) in the *Client Packages* section you will delete a package with all transactions from the system. Also, this package will be removed from the *Client Info* form.

To delete the package completely you need to do the following:

- delete the package from the list in the Client Packages section
- open System/Task Scheduler section
- run Packages Manager
- return to the list of packages in the Client Packages section
- sort the list of packages by the status "archive"
- find a respective package and click the delete icon store to remove it completely from the system.

Retail section

Packages

- The "Recalculate to Period" feature of the Billing settings sub-panel is upgraded. Now the system recalculates the subscription fees according to an actual number of days in a month (including 28/29 days in February).
- 2. The new feature "Charge on call" allows applying charges to respective customers only after the start of usage of this package. To use it, tap the "Charge on call" check box. When it's selected, the Subscription fee will be charged after the first call within this package is made by the client to whom that package is assigned.
- 3. From now on, you can set both types (Money/Time) of Volume Limits within the same package. Previously, you may only choose one limit type.

Screenshot: "Packages" settings

🛞 Packages							
Nan	me:			DID LIMITS			
Resell	ler: 🚨 AC		•	Number of D	DID's: 0		
Curren	icy: USD		•	Allowed DID gro	pups:		•
Code De	eck:		•	3			
Stat	tus: Active		-	VOLUME LIMITS 😳			
				Code / Code Name		Limit	100 min 🗱
BILLING SETTINGS				7940 7940			99 USD
Peris	od: Y M D I Fees include taxes Align to Payment Terms Recalculate to Period Charge on call	4		DISCOUNTS O	• No Discounts		
Fee Type	Fee Name	Fee Note	Rate, USD				
Activation	Activation Fee		0				
Subscription	Subscription Fee		0				
PACKAGE APPLICATION Prior Deal Start Da Deal End Da	ate:					OK Canc	cel Apply

DID

From this version forward, when a package with already assigned **DID number** is not active, the respective DID number will be in "Hold" status and routing destination is unreachable.

The "Status Date" and "Hold Date" fields in the DID-Management \rightarrow Retail section are upgraded. The DID moves "In Stock" when the specified holding period is over.

Screenshot: "DID Management" settings

🛱 DID Manageme	ent		3333
DID(s):	3333		
Operator:	AP Operator		•
DID Group:			•
Status:	Hold		-
	11/10/2015 11:37:41 +0000		
Hold Date:	11/11/2015 11:37:41 +0000		
		Ok	Cancel

(i) While viewing the DID settings we strongly recommend to click the "Cancel" button. Therefore, the date changes aren't applied.

Statistics

Dashboard

We implemented **new charts** and adjusted parameters to provide data visualization. You could display a series of numeric data from the reports in a graphical format to easily understand large amounts of data and relationship between different series of data.

Hence, you can create charts and plot the data from the *Summary Reports, Orig-Term Reports* and *Active Calls* sections. Also, you can export already created charts to the *Dashboard*. And there is a possibility to add new templates to the Dashboard.

Moreover, you can use the default templates, copy and customize them according to your demands. To choose the default template: click the "Show Chart" button and select it from the drop-down list.

Read more about charts by clicking on a link to the article "How to create a statistic chart?" in our Knowledge Base.



Please note, each Reseller and Admin have its own dashboards. If you logged in the system as Reseller the exisiting dashboards will be visible only for this Reseller.

Summary Report

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As it has already mentioned, **the structure of reports is modified** to make your work with statistical reports much more painless. There is a **new form of queries**. It allows to easily run useful analysis reports with customizing search criteria, choose parameters that should be summarized, group data. Also, you can gather statistical data and display it as **visual charts**.

These sections have a new search form: Summary report, Orig-Term Report, Balance Report, Profit Report, LCR's list, CDR's list, Calls Rerating, Reports Templates, Rates Analysis, Active Calls.

Screenshot: Summary Reports section

Management Retail Statistics Tools Routing Configuration System Signature	Signed in as: admin Change Password About Logout OB/06/2015 11:33:21 +0000 COLUMNS (4)
FILTERS © OUTPUT Interval: Last Year 2014-01-01 [00:00:00] - [2014-12-31] [23:59:59] [UTC Order By: Time Total T Group By: Currency × Leg Origin × V Limit: No limit	COLUMNS (4)
Interval: Last Year 2014-01-01 00:00:00 - (2014-12-31 (23:59:59) UTC Order By: Time Total Umit: No limit Type: Web	7. X -
Save Query Load Query	v Query
🖳 Export to XLSx 🔄 View Charts 👘	
	2014 15:00:00 +0000 - 03/30/2014 15:59:59 +0000 trator on 08/06/2015 11:32:06 +0000 List
E EUR 0.00 561.33	100
EUR origination 0.00 280.67	50 🐚
EUR temination 0.00 280.67	50 🕅

1. New search form has updates in the settings to generate data:

- Click the ^O plus sign next to the "Filters" and **only select the filters that you need for the report**. You can cancel any filter by clicking the delete icon **\$**.
- The "Interval" filter has additional options and you can generate the report for last 3,7 and 30 days.
- Now you can group the data using the "Group By" field, here you can select and swap columns.

Please note, that if there is the *Client* or *CC serial* specified, it is not possible to group by default anymore.

2. There is a new special **Output form**, that is intended to simplify the way to output data:

- Select columns that should be present in the report using plus sign near "Columns".
- Dynamically sort already grouped data using "Order By" from highest to lowest values (or vice versa) and select parameters.
- Specify the number of rows that will be visible in the report in the "Limit" field (only for plain type of the report).
- New format of the "Type" field: Excel XLSx.
- The option "Send to"* is in the Summary Reports, before it was available only in CDRs list.
- API parameter order_by is renamed to orderBy.

• You can check an *actual date interval* of the report by clicking the *Info icon* . And it could be different from *the Interval* specified above if there is no date for all periods.

3. From now on, you can create a **Reports Template**. To add a template, click "**Save Query**" on the toolbar. To find existing templates, point to the *Statistics* and open the *Reports Templates* section.

4. Use already existing template while generating a new report. All you need is to click "Load Query" on the Summary Report toolbar and choose a template.

5. A new Reports Template form is available for use.

6. The "Watch" option in the Reports Template form allows sending the generated reports to the list of e-mails.

Screenshot: Reports Templates form

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(ii)

🕎 Reports Templates	
SUMMARY REPORT	WATCH
Title:	Recipients:
Reseller: all resellers	Run Time:
	Days of Week:
REPORT QUERY	
FILTERS Q	OUTPUT COLUMNS (15)
Interval: Today 2016-03-15 00:00:00 - 2016-03-15 23:59:59 UTC	Order By: Time Total X V
Group By: Call Origin ×	Type: CSV Type: Grouped
	Currency: USD 💌
	Code Deck:
	OK Cancel Apply

If the data is grouped in the report, it will be shown initially collapsed. To expand or collapse data in your report, click the 🗳 plus or 🖨 minus signs.

Please note, the system shows rounded values in the reports. But while calculating the system takes an exact value.

Hence, the procedure of the rounding is following:

- system rounds currency values according to the settings of a respective currency;
- the parameters of the time are rounded to the nearest hundredth. For example, 4.8763 to 4.88;
- and others are rounded to the nearest ten-thousandth. For example, 3.879256 to 3.8793.

Also, the "Limit" option is accessible for the Summary, Orig-term, Profit and Active Calls reports in the system. You can find it in the output form of the reports and only for the plain type. It allows to determine the number of rows that will be visible in the report. It is useful for displaying some top positions by chosen parameter.

Orig-Term Report

The interface of this section is improved and the **new form of queries** allows to easily select filters, group data by several parameters and change the view of output data. The similar form is presented in the *Summary Report, CDRs* and *LCR lists*, etc.

Also, you can gather statistical data and display it as visual charts.

Screenshot: Orig-Term Report section

Crig-Term Report		
	FILTERS O Interval: Last Week 2016-04-04 00:00:00 -	OUTPUT COLUMNS (19) Order By: Orig Cost a × Term Cost a × ▼ Limit: No limit ▼ Type: Web ▼ Grouped ▼ Qurgency: USD ▼ ▼
	Save Query Load Query	Code Deck:

Profit Report

This section is modified respectively to the changes in reports mentioned above. To know more about a new query form and other interface improvements, look thought the article "**Profit Report**" in our User Guide.

CDRs and LCR Lists

The structure of CDRs and LCR list are updated and now it is similar to the **new form of queries** of the reports (Summary Report, Orig-Term Reports, etc.).

Also, the API method stats_cdrs.edit is modified and now it requires to add respective permissions for users to be able to run this method.

Mismatches Report

From now on, the Excel XLSx, Excel XLS formats are available in the output form of the Mismatches Report section.

ches Report	CALLS WITH UNKN						
	CALLS WITH UNKN		1		Type:		
		origination	termination	all	Type.		
	Total Calls	0	0	0	Duration:	non-zero	T
	Non Zero Calls	0	0	0	Output:	Web	-
	Total Time	0 min	0 min	0 min		Web	
						CSV	
	CALLS WITH UNKN	OWN DESTINATIONS (KI	OWN CLIENTS)			Excel XLSx Excel XLS	
		origination	termination	all	Type:		
		-					
	Total Calls	25	25	50	Duration:	non-zero	•
	Non Zero Calls	25	25	50	Output:	Web	-
	Total Time	112 min	112 min	223 min			
						Quer	Y .
	CALLS WITH UNKN	OWN DESTINATIONS IN	RESELLERS (KNOWN F	RESELLERS)			_
		origination	termination	all	Type:	all	•
	Total Calls	0			Duration	non-zero	-
				-			
	Non Zero Calls	0	0	0	Output:	Web	•
	Total Time	0 min	0 min	0 min			

Screenshot: Mismatches Report section

Calls Rerating

Due to the changes in reports, the structure of the *Call Rerating* is updated respectively. And it has a similar form for queries related to a new basic structure of reports (*Summary Report, Orig-Term Reports, etc.*). Please look through the "*Call Rerating*" article in our *User Guide* to get more details.

Also, in the current release we developed an algorithm to recalculate the calls by Packages Limits in the Call Rerating.

Reports Templates

This section is integrated instead of **Reports to E-mail** section and allows to work with templates in Summary, Orig-Term, Profit reports, Active calls, Routing and Rate Analysis, LCR lists and CDR's list sections.

There you can view a created report, edit and run it. You can run a report by clicking the play icon zero and open the settings. Also, you can send the report via e-mail to specified e-mail address by using a new option "*Watch*" that is available in the *Reports Templates form*.

Screenshot: Reports Templates section

Management Retail Statistics T	ools	Routing Configuration System 💄 📑 🚱 🍶 🗆			08/19/2015 13:33:	10 +0000
🖳 Reports Templates						ی م
				Rows 1 - 5 of 33	« < Page 1 of 7	> »
ID Title		Report Query		Watch	+ Reseller	A V
B PROFIT REPORT						
15 One-Time Report Request		Interval: This Year Reseller: Mode:	Order By: Type: CSV – Plain Currency: USD	Θ	All resellers	*
		Group By: Inc Code Name, Out Code Name, Income Client, Outcome Client	Code Deck: GSOFT_code deck (ticket)			
16 One-Time Report Request	Þ	Interval: This Year Reseller: Mode: Group By: Inc Code Name, Out Code Name, Income Client, Outcome Group By: Client	Order By: Type: Excel XLS – Plain Currency: USD Code Deck: GSOFT_code deck (ticket)		All resellers	*
17 One-Time Report Request		Interval: This Year Reseller: Mode I: Group By: Inc Code Name, Out Code Name, Income Client, Outcome Group By: Client	Order By: Type: Excel XLS – Plain Currency: USD Code Deck: GSOFT_code deck (ticket)	Θ	All resellers	*
18 One-Time Report Request		Interval: This Year Reseller: Mode: Group By: Inc Code Name, Out Code Name, Income Client, Outcome Group By: Inc Carls, Inc Series	Order By: Type: Excel XLS – Plain Currency: USD Code Deck: GSOFT_code deck (ticket)	9	All resellers	*

If you create a report template and the option "Watch" is enabled, the client will receive the file with report even when there are no statistics for a specified period.

Please be aware, that the templates previously existing in the "Reports to e-mail" section could not be restored automatically. Note, that you can easily recreate them in the case of need.

Tools

Rates Analysis

The structure of *Rates Analysis* section is updated respectively due to the changes in reports. The rates could be analyzed and compared with all rate tables, originators or terminators using *Rates Analysis tool*. Therefore, you can select all values in the *Rates Analysis form* (see screenshot below).

Screenshot: Rates Analysis

Rates Analysis				
FILTERS Q		OUTPUT		
Outlook: rates comparison		Type:	Web	-
Originators: ALL ×	32	C	1100	
Terminators: ALL ×	*	Currency:		
Rate Tables: ALL ×	×	Code Deck: Simulate long codes:		
Group By: Code ×				
Save Query Load Query				Query

The Active Calls section has a new form of queries. The similar form is presented in the Summary Report, Orig-Term Reports, etc. Also, you can gather statistical data and display it as visual charts.

Additional interval feature "Show last" appears in Active Calls section. It allows to specify for which time period the system displays active calls statistics. For example, if you want to display the data for 1 day, click the "Reload options" button and set the period 1440 min in the "Show last" field.

Screenshot: Active Calls section

Active Calls		This section is only for reference. It dis	splays current a	active calls but does not	affect the billing or	statistics processing.
FILTERS	0		OUTPUT		COLUMNS (7)	
	Group By: VoIP Gateway ×	v.		Duration A × No limit Web	▼ ped ▼	
Save	Query Load Query				Query	
Reload options V Export to XI	LSx Show Chart					
Show last: 120 min	Info <u>Originator</u>	+ Terminator	Å	SRC Number	DST Number	Duration

Factors Watcher

The Factors Watcher is upgraded and now it blocks numbers with tech prefixes. The full list of blocked numbers you can check in the Blocked DST tab

Screenshot: Factors Watcher settings / Blocked DST

Factors V	Vatcher 📃 Blocked	DST						
Unblock all						Rows 1 - 50 of 59		>
Origin	▲ Origination client ▼	▲ Termination client ▼	▲ Origination account ▼	▲ Termination account ▼	▲ Code ▼	▲ Expires on ▼	▲ Blocked on ▼	_
ORIG	TOAST_Reseller_client#1	all clients	all accounts	all accounts	1234	2015-09-30 23:59:59 +0000	2015-09-10 10:57:05 +0000	
ORIG	TOAST_Reseller_client#1	all clients	all accounts	all accounts	38093	2015-09-30 23:59:59 +0000	2015-09-10 10:57:05 +0000	
ORIG	sub/sub_client	all clients	all accounts	all accounts	123	2015-09-30 23:59:59 +0000	2015-09-10 10:57:05 +0000	
ORIG	sub/sub_client	all clients	all accounts	all accounts	1234	2015-09-30 23:59:59 +0000	2015-09-10 10:57:05 +0000	
ORIG	sub/sub_client	all clients	all accounts	all accounts	5678	2015-09-30 23:59:59 +0000	2015-09-10 10:57:05 +0000	
ORIG	Norw_orig	all clients	all accounts	all accounts	44004400	2015-09-30 23:59:59 +0000	2015-09-10 10:57:05 +0000	
ORIG	Norw_orig	all clients	all accounts	all accounts	471882	2015-09-30 23:59:59 +0000	2015-09-10 10:57:05 +0000	
ORIG	Norw_orig	all clients	all accounts	all accounts	474000	2015-09-30 23:59:59 +0000	2015-09-10 10:57:05 +0000	
ORIG	Norw_orig	all clients	all accounts	all accounts	4758	2015-09-30 23:59:59 +0000	2015-09-10 10:57:05 +0000	

Also, there are few changes in the Factors Watcher section:

- 1. New possibility to add the **Reports Template** while creating a new factors watcher. Note, the system enables to set a limited number of parameters overridden from the assigned template.
- 2. You can set several clients for respective factors watcher (see screenshot below).

Screenshot: Factors Watcher settings

🔥 Factors Watcher	7							
	Name:				Analyze mode:	Fixed period		
Ana Ana	lyze by: Summary report		•		Check every:	30	minute(🔻	
Report Te	mplate:		-	Analy	ze interval of:	30	minute(💌	
					Time zone:	UTC	-	
					Period Start:			
QUERY	2							
Client:	 EUROPE ORIG CLIENT × ASIA ORIG CLIENT × AMERICA ORIG/TERM CLIENT × ASIA TERM CLIENT × 	Account:						
Code Name:		Code:						
Company:	all resellers	Code Deck:	Pre-assigned dec	:ks 💌	VoIP G	ateway:		•
Group By #1:	▼	Group By #2:			Group	By #3:		•
Test Query						ОК	Cancel	Apply

3. Now, there are **multiple parameters** for rules to add in *Factors Watcher* section. You can find the extended parameter list with specified measurement units in the *Factors Watcher* form. Also, it's possible to add factors watcher rule with negative values. For example, *cost_total* < -10.

Screenshot: Factors Watcher form

						Ro	ows 1 – 1 o
riority	Match Call Origin	Factors	Action	Lock Period	Periodic lock	Expiration Date	
21474	origination •	cost_total > 0	Alert	21 min			
	u can use "*" wildcard in these fields. ou should list watch rules in this field delimited by ";" List of correct fields:						

CDR Disputes

The **CDR Disputes** have developed optimization algorithms of the file uploading process. Hence, we strongly recommend uploading files with a limited number of columns. **The dispute file should contain only 6 columns** for correct auto-detection while importing.

Screenshot: CDR Disputes form / Import

a Import					
Client:		Select File:	Choose File	No file chosen	
Account:		Date Format:	auto	▼ auto ▼	
Type:	origination 👻	Period:	last week	▼ 2016-01-04 - 2016-01-10 UTC	-
Code Name:		Override timezone:			
Code:					
Code Deck:					
					Process »

Routing

Routing Plan

- 1. A new option "Routing loop protection" appears in the Routing Plan. It allows to decline calls from different accounts of the same client. It's enabled by default. To disable it tap the "Routing loop protection" check box (see screenshot below).
- 2. There is an enhancement of the "Parent Routing Plans" and you can select several parent plans.
- 3. Now, in the "Vendor Limit" box you can set the limit only for accepted account routes, not including the accounts blocked by the term groups.

Screenshot: Routing Plans form

B Routing Plans				
GENERAL INFORMATION		RULES PROCESSING		
Name:		Rules Hunting:	longest only	-
2 Reseller:	🕹 AC 📃 👻	DR Order:	by code / appeal	•
	DR × test × RP AMERICA ORIG × to Europe ×	3 PM:	0 [USD / %]	
Code Deck:		Vendor Limit:		
Origination Limit:			es how many routes from the same	
Termination Limit:			should be used, if vendor has multiple its. No limitation in case of empty.	
	Routing loop protection			
			ок	Cancel Apply

Routing Analysis

Due to the changes in reports, the structure of the *Routing Analysis* is updated respectively. And it has a **new form of queries**, above-mentioned in this revision list. Please look through the *Routing Analysis* in our User Guide to get more details.

Configuration

urrencies

New configuration options allow to set the number of decimal places for each currency. The respective number of symbols will be displayed in all reports with cost and rate values in the statistics. Also, it will be shown in the invoices, except total values (totals always have 2 decimal places in invoices). While creating a new currency there are additional options for accurate monetary values formatting in the system:

- "Rates precision" the number of decimal places for rates formatting.
- "Details precision" the number of decimal places for detailed monetary values formatting. This precision is used for all reports except CDR report.
- "Totals precision" the number of decimal places for total monetary values formatting.

Screenshot: New currency form

New Currency	
Nan	
Rates precisio	
Details precisio Totals precisio	
10000 (10000)	
	OK Cancel Apply

Payment Gateways

The **PayPal fee** functionality becomes fully automatic. The fee settings in *Payment Gateways PayPal section* are entirely removed, and now all calculations are made automatically.



New gateway parameter "*IP*" for QIWI validation is available in the Configurations section, Payment Gateways. You can specify several IP adresses separated by comma without spaces.

Screenshot: Payment Gateways settings

VIWI 🕑		ORDER POSITION:
E-mail:		Your QIWI e-mail, payment recipient.
Provider ID:	0	Qiwi provider ID.
IP:	00.000.00.00,00.000.00.00	Qiwi gateway IP. Separated by comma without spaces.
Payment Account:	General 💌	Specify account which will be used for transactions from this payment gateway.
	Here you can add funds to your balance by using your PayPal account.	A user will see this text as a help-tip for respective payment method.

Groups

New feature "VoIP Host Group" is available in the Configuration section - Groups. It enables VCS users to group the statistics by respective host groups. Also, you can find the "VoIP Host Group" field in invoices (Stats_table).

Screenshot: VoIP Host Groups section		
🔏 Groups 🛛 🗐 Orig Groups 🖉 Term Groups 🛛 🎼	DID Groups 🛛 📔 Rate Groups 🖉 🍓 VoIP Ho	st Groups
• New Group		
A Name V	Reseller V	Notes
Group A	all resellers	

all reseller

Invoices Templates

Group B

From now on, you can enter the special characters as &*; + " % # or other symbols in the names of accounts, packages, invoices, VoIP groups or code names, etc. And the system will recognize and display them correctly while generating invoices or using invoice templates.

Rows 1 - 2 of 2

*

*

Screenshot: "Invoices Templates" settings

Invoices Templates			s	iearch 🔎
🚯 New PDF Template	te		Rows 1 - 16 of 16	< < Page 1 of 1 > >
ID 🗍 Name	Туре 🗄	Reseller	A Notes	
8	PDF	all resellers	all variables are here and CDRs are enabled in.csv	*
19 CSC_default	PDF	all resellers		*
20 CSC with balance previous	PDF	all resellers		*
6 November & December	PDF	all resellers		*
16	PDF	all resellers		*
17	PDF	all resellers		*

Now you can select the Time format (H:M:S) or (M:S) while creating a new invoice template. The default format is in minutes (M).

Moreover, some values were removed from invoices templates settings by architectural considerations, namely:

- {package_time_f}, {time_f} in Stats Table;
- {time_f}, {billed_time_f} in CDRs Table.

The **method of calculating** and **rounding values** has been updated. Also, there are new features "Totals Calculation" and "Taxes Calculation" in the *I* nvoices Templates that helps to avoid rounding issues with float numbers and missing cents.

Screenshot: Invoices Templates settings

🤯 Invoices Templates			All variables
Name:	All variables	Notes:	
Reseller:	🌡 new 🔍		
Anonymized Codes:	CodeDecks		
Locale	English		
Totals Calculation:	Round then sum		
	Percent from total amount		
	Attach CDRs list to the invoice		

Let's	take	а	closer	look	at it:	
-------	------	---	--------	------	--------	--

Best practice example:

If you have the next parameters:

- calls with the cost: \$0.005 (the tax is \$0.00105)
- package with activation fee: \$ 7.1144 per month (the tax is \$1.494024)
- package with activation fee: \$ 5.1144 per month (the tax is \$1.074024)
- package with activation fee: \$ 3.1144 per month (the tax is \$0.654024)
- tax 21%

And you select respective options:

Round then sum and Percent from the total amount	Sum then round and Sum of individual taxes
Then, it rounds specified above values in the invoice just like that:	It takes specified above <i>not rounded values</i> and calculates the total amount (\$0.005+\$7.1144+\$5.1144+\$3.1144) = \$15.3482.
 calls - \$0.01 packages - \$7.11, \$5.11, \$3.11 	After, it rounds a received sum (\$15.3482) and the total amounts are following:
After it calculates the total amount (\$0.01+\$7.11+\$5.11+\$3.11) = \$15.34. The total amounts are following: • amount without tax - \$15.34 • tax - \$3.22 (15.34*0.21) • amount including tax - (\$15.34+\$3.22) = \$18.56	 amount without tax - \$15.35 tax - \$3.22 (1.494024+1.074024+0.654024+0.00105) amount including tax -(\$15.35+\$3.22) = \$18.57

Therefore, it's less than \$0.01 cent from the total amounts. Totals may not match due to the selected option of the rounding method.

A new collector "Cisco 2811" is accessible in the "Collector Type" field of the RADIUS Server. This one is based on collector "Cisco / Universal". The advantage of this version that it returns header 'h323-return-code=16' in the case of successful authentication. Whereas the "Cisco / Universal" only returns header 'h323-return-code' in the case of authentication failure.

Screenshot:	"VoIP	Gateways"	settings
-------------	-------	-----------	----------

lacktriangleright Bateways	5		
GENERAL INFORMATIO	N 🖸		FILES COLLECTOR
Name:			
IP Address:			
LNP Provider		-	RADIUS SERVER
Allowed For:		-	Collector Type: Cisco 2811
Group:		-	Secret:
FILES DOWNLOADE	R		SIP SERVER
Type: SSH			Collector Type: Brekeke
Login: root			
From path: /usr/lo			
C TRAFFIC PROCESSIN	IG		
			OK Cancel Apply

Settings

There is an enhancement of the **Backup Manager**. Therefore, an **archived statistics will not be uploaded by the Backup manager when you run it**. Now you can perform the backup faster thanks to the several improvements:

- The new possibility to make a backup of the database in multiple streams. You can configure the number of threads in the *Configuration section Settings Backup Settings Numbers of Backup Manager Workers* (see screenshot below).
- The advanced option "Statistics archiving delay", that allows archiving respective data in advance. You can configure the number of days in the Configuration section Settings Auto-Rotation and Cleaning Statistics archiving delay (see screenshot below).

The recommended strategy is to configure this field and specify the days, do not leave 0 days as it's by default. Therefore, the system will archive the statistics automatically according to the specified period. And the next time the following backup will take less time because of the decreased volume of the not archived (active) statistics.

Screenshot: Configuration section/Settings

Delete events from log after:	1 day(s) (from 1 to 90)	Delete events from Events Log after specified period of days.
Statistics archiving delay:	7 day(s) (0 - do not archive)	Archive statistics in advance. Each day minimize time needed for backup.
Statistics rotate delay:	15 day(s) (0 - do not rotate)	Rotate statistics to archive after specified number of days.
Delete not actual rates after:	5 day(s) (0 - do not delete)	Delete rates from system, when they are not actual and effective date is older than specified number of days.
Delete parsed CDR-files after:	5 day(s) (0 - do not delete)	After what number of days already parsed and processed CDR-files should be deleted fron local server.
Delete archived log-files after:	5 day(s) (0 - do not delete)	After what number of days archived log-files should be deleted from local server.
Delete archived log-files after: Delete DIDs history from log after:		After what number of days archived log-files should be deleted from local server. Delete DIDs history from DIDs history after specified period of days.
-	5 day(s) (from 1 to 90)	Delete DIDs history from DIDs history after specified period of days.
Delete DIDs history from log after:	5 day(s) (from 1 to 90)	Delete DIDs history from DIDs history after specified period of days.
Delete DIDs history from log after: KUP SETTINGS System backup period:	5 day(s) (from 1 to 90)	Delete DIDs history from DIDs history after specified period of days.

System

The re-rating modes are removed from *System section* and now the *Historic mode* (i.e. calls are processed based on the Client's state at the time of the call) is ON by default.