

JeraSoft Billing 3.11

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JeraSoft is excited to announce the major release of **VCS 3.1**. Here you can find a full list of new functions and improvements available by updating the software.

Please be informed that during an update to the latest version VCS 3.11.2:

- **pending rates** (rates that are not confirmed during import process) **will be removed** from the system.
- **audit logs** will be **cleaned up to 1 month**.

Management

Clients


1. JeraSoft VCS is integrated with **third-party tax calculation engine SureTax**. This tax calculation is based on the location of the customer's taxing jurisdiction. It contains virtually every jurisdictional rate and rule in the US, US territories and Canada. It allows to manage your compliance with tax law.

a. You can configure the **SureTax tax profile** in the **Clients/Resellers settings**. This tax profile will be used for further calculation in invoices.

b. Moreover, it's possible to adjust a **taxation for non-calls charges**: *packages* and *extra charges*. This enhancement introduces a new **"ZI P Code"** field in the *Client's settings*.

Here you can enter the code for further calculation of tax rates at a location (see screenshot below).


Note: For further information on how to use it, read the article [US Taxation](#) in our *Knowledge Base*.

2. You can manually notify customers on **changes of rates assigned to the account** via **"Rate Notification"** option. To do so, open *Client's settings* and click the down arrow  next to the *Rate Notification* check box. Then, select an account and click **"Notify Now"** (see screenshot below).

Please note, a **manual notification is only for orig accounts** that belong to the client and notifies clients about unique rate changes. If you assign the same rate table to the client and account, it will send only one notice of rate changes.

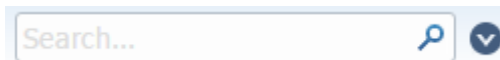
3. We have implemented **tags** that enables to organize resources more flexible. Basically, tags were integrated to replace previously existing groups. The tag provides similar functionality as an assigned group. Here's a full description of tags, see below in the section *ConfigurationTags*.

- a. *Client Info* form allows you to **apply a tag** to the client. Here you can find a new field "Tag" in the *System information* sub-panel (see screenshot below). Each tag consists of value that you define and can be used instead of groups. The tag doesn't need to be pre-existed in the system. You can provide an unlimited number of tags for each client.

 For a detailed guide about how to use tags to your advantage, read the "*Tag*" article in our *User Guide*.


Screenshot: *Client's settings*

4. The **Quick Search toolbar** updates include:





of the *Clients* section was significantly updated. These

- a. Search clients by *Account Name* (i.e. an identification account name indicated in the field: *ID/Name/ANI*, not a general name), whereas the search by *Account* (a general name) was removed.
- b. The next search parameters: *ID*, *Company Name*, *E-mail*, *Control Panel login* were removed. However, some of them are still accessible in the advanced settings.
- c. Search through clients by Name and only by first letters ("*start with*" rule).
- d. Search clients by their **Main e-mail** from the full list. To find all clients with specified main e-mail, use * (asterisk) in this field.

5. You can modify **client's notes** by clicking the *edit icon*  in the *Notes* tab of respective client's settings.

6. The **autocomplete for login/passwords is disabled** for several forms: *authentication of API testbed*, *account form*, *payments gateways*, *rate tables form of automatic email import*, etc. It's applicable for the Chrome web browser.

 When you **delete the client** by changing the status to *deleted* or click a respective icon , the *Client Panel* of this client will be disabled and origination/termination settings of his accounts will be off. However, his accounts will not be deleted from the system.

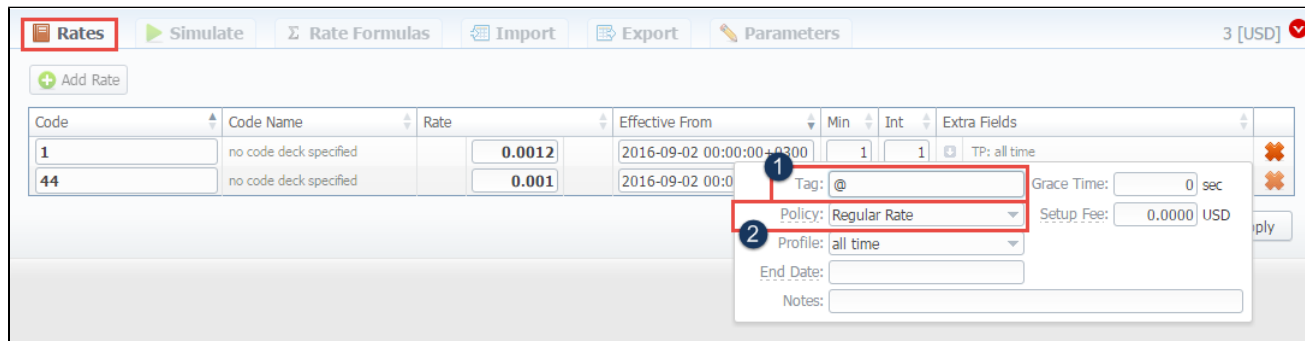
Rate Tables

This section has a rich set of new features and enhancements to streamline the workflow with rates.

1. Now, it's possible to **apply tag for respective rates** in the *Rate Table* section. The default *Rate Group* for jurisdictional billing was removed. Use the "at" (@) sign as a **default tag for rates** instead of this group. To do so, open the *Rates settings* and click the gray down arrow in the *Extra Fields* column. Then, add or select an appropriate label from the drop-down list of the "Tag" field.

You can find a full description of the tags below in the section *ConfigurationTags*.

Screenshot: Rate Table settings



2. From now on, it's possible to add **extra rates for destinations**. Therefore, you can **add codes** to additional (extra) rates.

Due to this modification, extra rates and the *Extra tab* were completely removed from the *Rate settings*. Alternatively, there is a new option "Policy". It allows selecting a rate's type for a code: regular rate or an additive (extra) rate:

- **regular rate** - this policy signifies a usual rate definition for the event;
- **additive (extra) rate** - this policy signifies that this rate will be added to a regular rate for the event.

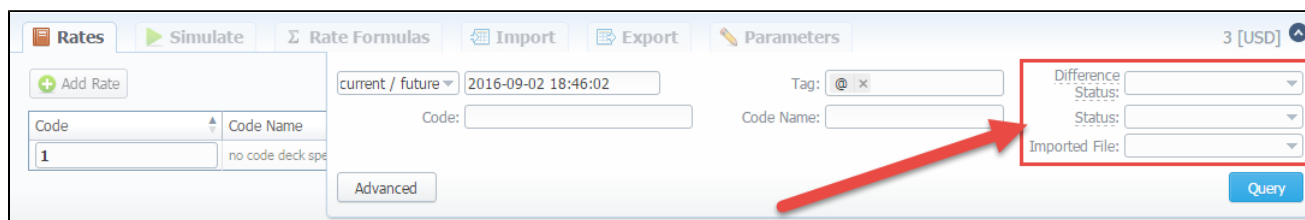
During the billing, the system takes one regular rate and all additive (extra) rates that are appropriate for the call. Click the down arrow in the *Extra Fields* column to find it. Now all rates (regular and additive) are represented in a general list of rates.



Please note, a regular/additive rate table will be determined by accessible dynamic and static tags used for the call.

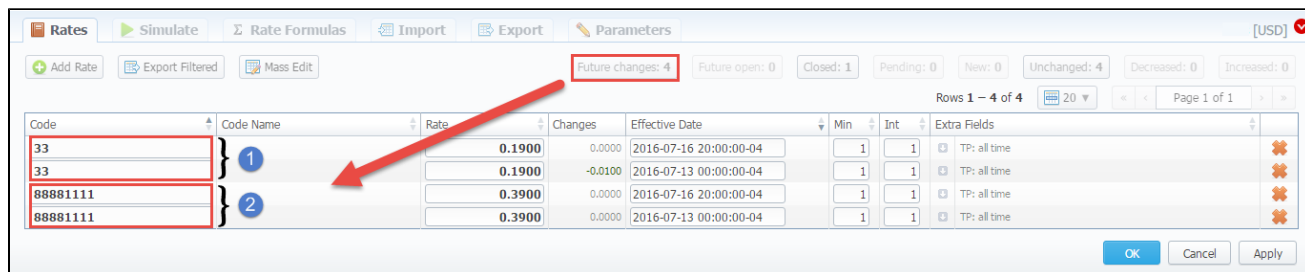
3. **Quick search** functionality is modified. So, you can filter rates by the **status (active/stashed)**. Stashed (unconfirmed) means that the rate will not be used for billing or routing process. Also, a new option "Difference Status" allows to show changes of rates, how the rate differs from a previous one.

Screenshot: Rate Table settings/search settings



4. Possibility to **manage future changes of rates manually**. To do so, enable the simple mode of Full A-Z import and import rates. Then, click the "Future changes" button on the toolbar of *Rates tab*. It will show a list of conflicting rates. On the screenshot below you can find two pairs of conflicting rates because of different effective dates.

Screenshot: Rates tab




5. The **import process flow** of rate tables was optimized and you can use the *"Import"* tab in the most efficient way (see screenshot below).

Screenshot: Rate Table import

The screenshot shows the 'Import' tab in a software interface. The top navigation bar includes 'Rates', 'Simulate', 'Rate Formulas', 'Import' (highlighted with a red box), 'Export', and 'Parameters'. Below the navigation bar, the 'FILE PROCESS' section contains a 'Select file for import:' field with a 'Choose File' button and 'No file chosen' text, and a 'Fields Delimiter:' dropdown set to 'autodetect'. The 'IMPORT PROCESS' section includes 'Import Template:' and 'Auto Confirm:' dropdowns, and an 'A-Z Close Date:' field with the value '2016-10-06 17:00:00+0300'. A 'Process »' button is located to the right. The 'ADVANCED OPTIONS' section, highlighted with a red box, contains several settings: 'Date Format:' (auto), 'Custom Format:' (empty), 'Update Code Deck:' (Disabled), 'Code Deck:' (empty), 'On Duplicates:' (Update with latest value), 'On Errors:' (Import correct rows and show all found errors), 'Optimize Codes:' (Disabled), and 'Notificator Code Deck:' (empty).


- In particular, the *"Full A-Z import"* option was updated. These updates include:
 - a. New mode *"Extended"* of **Full A-Z import**. While importing process the *"Extended"* mode closes already existing future rates and active rates (not presented in this import) from current Rate Table will be closed by the Close date. Then, these rates will be marked as stashed. Note, this functionality has been modified from the version 3.10.7.
 - b. *"Full A-Z import"* option (for both modes) creates new rates (that will be closed) for all rates that should be closed previously (not presented in the imported file).
- Additionally, while importing process (Step 2. Recognizing The File) you can **apply a tag to the imported rates**.
- Moreover, it's possible to **import regular and additive rates at once**. To do so, select a column *"Policy"* during the 2nd step of an import process to load different rates to the system.

 Please, pay attention to the important moments:

1. If you create an import template for a rate table, this template will be used as default.
2. Client's currency and Client template's currency should be the same. Otherwise, you need to create an exchange rate.
3. If you update the *Rate Table* (i.e change the Reseller) specified in the *Calling Cards series*, you need to **reassign a respective rate table** to the *Calling Cards series*.
4. Currencies of a parent and current rate tables should be the same.
5. The working method with Parent Rate Table could be applied only for origination.
6. If you assigned a *Rate Table* to the *Client/Account/Manager/Sub-Reseller/Reseller* with no permissions to use it, these adjustments would be reset. Please, **re-assign rate tables correctly before the update**. Otherwise, the traffic won't flow normally.

6. The option *"Parent Rate Table"* appears in the *Rate Tables* section. It helps to extend codes of the current rate table.

Therefore, codes with the same length in the current rate table will have the priority. However, longer codes from the parent rate table will override the codes in this rate table. Also, it allows to apply child rate tables with special rates to clients.

 For example, you can create a *Child Rate Table* for some destinations and add special rates. Then, specify a respective *Parent Rate Table* (that includes all standard rates) in the *Child Rate Table* settings. And assign this *Child Rate Table* to the Client.

Screenshot: Rate Tables settings

Rate Tables

GENERAL RATE TABLE SETTINGS

Name: Rate Table A

Reseller: Company Name

Parent Rate Table: Example 1

Code Deck: DEFAULT


Currency: USD

Rates with taxes

Description:

OK Cancel



To add a particular rate table from the full list of available accounts, open the *Account* section and click the plus icon  in the *Orig /Term details* columns to add a rate table for respective account.

7. Tab **"Simulate"** has a new field **"Tags"** in the settings. It allows to filter rates by respective labels.

Screenshot: Rate table section/ Simulate tab

Number: 123

Date: 2016-10-06 11:08:50+0300

Tags: @ *

Duration: 60 sec

Process

	Code	Call Cost	Effective From	Rate	Tag	Parameters	Billed Time
1	123 USA Proper	0.8000	08/09/2016 03:00:00 +0300	0.8000	@	1 / 1 / 0	60 sec
1	1 USA Proper	0.0021	09/14/2016 00:00:00 +0300	0.0021	@	1 / 1 / 0	60 sec

8. Tab **"Export"** has new columns: **"Prev Diff Status"**, **"Next Diff Status"**, **"Prev Diff"**, **"Prev Diff Status (export)"**. Check out the ["Export"](#) article in our User Guide for more details.

Invoices

1. There is a new **pre-invoicing** option that allows adding future charges in invoices. Now, you can **select the type of charges** for invoices in the **"Included Charges"** field.

- **uncovered** - all charges that are not included in any previous invoice;
- **covered** - all charges already included in the previous invoice;
- **pending** - all pending charges.

By default, the invoice includes all uncovered charges.

Screenshot: Invoices settings

Invoices

Client / Reseller:

Period: Last Week | 2016-04-11 - 2016-04-17 | UTC

Type: outgoing

Invoice No: (empty = auto)

Invoice Date:

Included Charges: Uncovered * Covered * Pending *

Comments:

Action: Generate new invoice

Template: all | PDF

Currency: USD

State: normal

Due: days

OK Apply Cancel

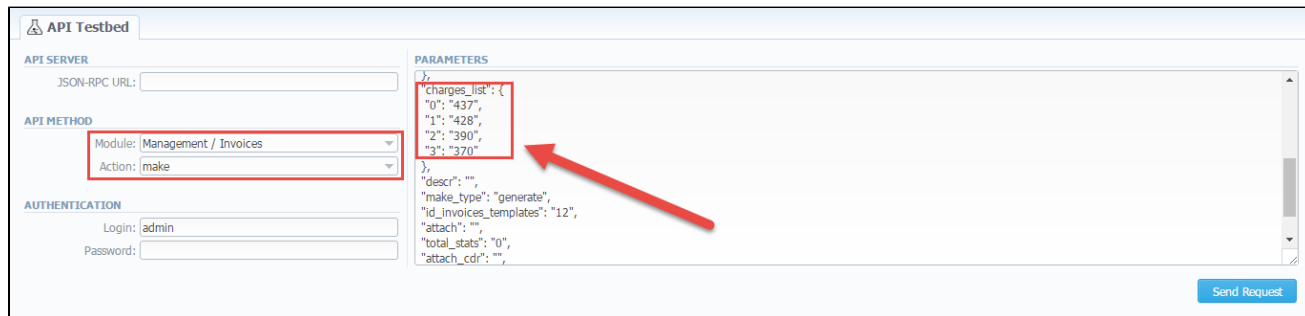


It's not possible to include a charge twice with standard settings. To **re-include already used charge** in the invoice, you need to **combine parameters "uncovered" + "covered"** in the **"Included Charges"** field.

2. You can **include specific charges by ID** in the invoices (only for API). The ID for extra charges and packages you can check in the *Transactions*

section. Then you need to add the variable **"charges_list"** with respective values in the **"Parameters"** field of the **API Testbed** section (see screenshot below):

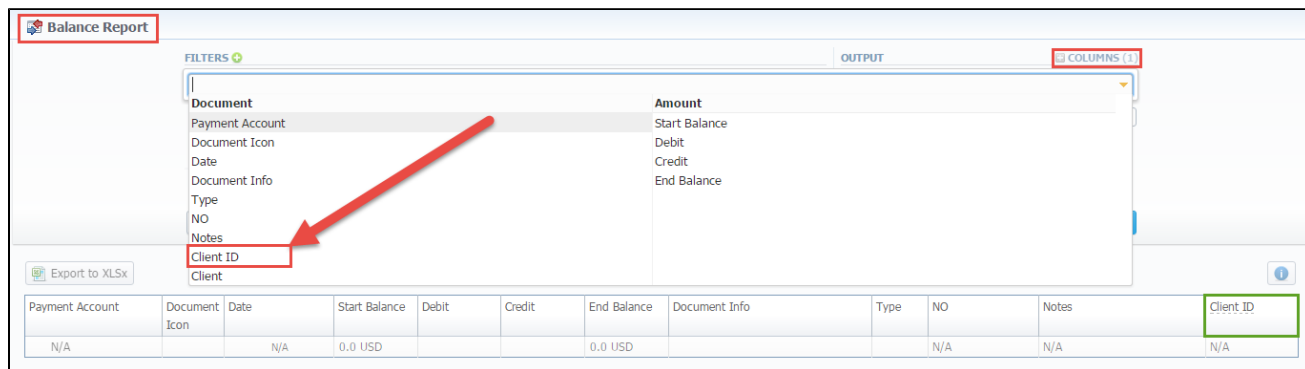
Screenshot: API Testbed settings



Balance Report

The option **"Client ID"** is added in the **Balance Report** section. Also, the client identification appears in the full list of **Transactions** and **Invoices**.

Screenshot: Balance Report section



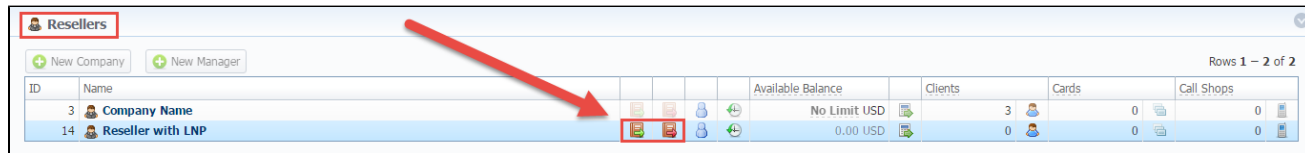
Resellers

1. New possibility to **add an orig/term rate table to the Reseller** directly on the page with full list of **Resellers**.

To assign an orig rate table for a respective Reseller, click the **Orig rate table** icon .

To assign a term rate table, click the **Term rate table** icon .

Screenshot: Resellers section



2. Added possibility to **delete the company logo** in the **Reseller settings**. To do this, open the edit form of a respective Reseller with logo, then click the delete icon to remove an old logo.

3. Adding and editing forms have a new **auto-complete option** that works according to the **Reseller settings**. Therefore, while creating a new client under respective Reseller, you will have already filtered drop-down list with available parameters in the following fields: **Code deck**, **Rate Table**, **Routing Plan**, **Groups**, **Clients Template**, **Taxes profile** and other fields related to the **Reseller settings**.

4. The **Reseller form** has a new mail template: **Reports Watcher**. This option is designed to configure templates for reports.



Please use respective variables for the mail template Reports Watcher:



- `${report["title"]}` - head of a report template

- `#{report["interval"]}` - an actual report period of time
- `#{report["title-full"]}` = `#{report["title"]}` + `#{report["interval"]}`
- `#{report["webUrl"]}` - URL to view report in the web portal
- `#{report["id"]}` - ID of report template





Please note, the field "**E-mail**" of Reseller's contact information became mandatory. After update to the latest version, **make sure that all e-mail addresses of your Resellers are specified in their settings.**

Client Packages

This section has **new icons** accessible from the full list of packages. To renew the package, click this icon . Besides, we strongly recommend not to renew the package on the expiration date. To cancel the package, click this icon .

Presets

1. Now the **Presets** and **Traffic Processing** are separate sections in the system to make the work with them more painless and provide with a flexible search. You can find these sections in the *Management*. Read more about these changes by clicking on a link to the articles: **Presets** and **Traffic Processing** in our *User Guide*.
2. The quick search tool is updated and you can **filter presets by Factors Watcher rules** from the full list of existing presets. Click the down arrow  on the search toolbar for these settings.
3. You can **find the details about Factors Watcher ("Blocked by" parameter)** under which a preset is created. To access it, choose the preset and point to the *Details icon*  of the "Notes" column.
4. The **import of presets is updated**. Now the user can import presets by Code and Code Name at the same time from one file.



Please note, that the **API method of workflow** process of the *Presets, Traffic Processing, Reports, Import* was changed. So, you **need to modify API method**. You can check modifications in *System section - API Testbed*.

Traffic Processing

From now on, you can **add tags** and **rules** that will be applied only for calls with specified tags. Therefore, *Traffic Processing* form has two new fields: "**Tags Match**" and "**Tags Add**".

- "**Tags Match**" - you can here specify respective tags that will be used while matching. It matches by dynamic and static tags.
 - all** - applies for calls with all next specified tags.
 - any** - applies for calls with at least one of next specified tags.
- "**Tags Add**" - here you can add tags that will be added for calls matching this rule.

Screenshot: *Traffic Processing settings*

Traffic Processing

Type: <input type="text" value="Orig"/>	VoIP Gateway: <input type="text"/>
Client: <input type="text" value="Client ABC"/>	Account: <input type="text"/>
Code: <input type="text" value="44"/>	Code Name: <input type="text"/>
Src Match: <input type="text" value="44870"/>	Src Replace: <input type="text"/>
Dst Match: <input type="text" value="44870"/>	Dst Replace: <input type="text"/>
Tags Match: <input type="text" value="All"/> <input type="text" value="Tag A"/>	Tags Add: <input type="text" value="Rates within Europe"/>
Order: <input type="text" value="1"/>	



Here's a full description of tags, see below the section *ConfigurationTags*. For a detailed guide about how to use tags to your advantage, read the *"Tag"* article in our *User Guide*.

Also, you can check values (i.e. *VoIP Gateway*, *Client/Account* for which the rule is applied) in one column *"Applied to"*.

Retail

Packages

1. It's possible to **add a tag to the package**. Thus, when you assign a package with tag to the client, a routing process will be performed according to the settings including tags.
2. Due to the appearance of tags, *DID Limits sub-panel* has a new field *"Allowed DID tags"*. Here you can specify tags that are used while creating DIDs.
3. New option **"Pre-activation"** is accessible in the *Package Application sub-panel*. You may use it in order to provide prepaid services for customers. For example, you may include a charge of the package in the invoice for a previous month. To activate it, you need to indicate the period in hours when the package will be reactivated and the pending charge will be created.

Screenshot: Packages settings

Packages

Name: Package A
Reseller: Company Name
Currency: USD
Code Deck: DEFAULT
Status: Active
Tag:

BILLING SETTINGS

Period: Y M D H
 Fees include taxes
 Align to Payment Terms
 Recalculate to Period
 Charge on call

FEES

Fee Type	Fee Name	Fee Note	Rate, USD
Activation	Activation Fee		0,008
Subscriptic	Subscription Fee		0,001

PACKAGE APPLICATION

Priority: 1
Deal Start Date: 2016-09-30 00:00:00
Deal End Date: 2016-10-02 00:00:00
Pre-activation: 0 hours

DID LIMITS

Number of DID's: 0
Allowed DID tags:

VOLUME LIMITS

No Volume Limits

DISCOUNTS

No Discounts

OK Cancel Apply



1. When you assign different packages (with specified volume limits and tags) to the same client, please note, two or more packages couldn't be used simultaneously.
2. If you add a tag to the package, this tag will be dynamic by default and will not be displayed in the *Routing Analysis* report and *CDRs List*.

4. The **Quick Search toolbar** of the **Packages section** was updated. Now, you can filter packages by the Reseller and status.

DID Management

1. The *DID Management* form was modified and there are new fields: "Tag" and "Hold Days" (previously available in the *DID Groups*).
2. *DID Groups* field was completely removed due to the appearance of tags in the system.

Screenshot: *DID Management settings*

Statistics

- As we continue to evaluate the design of our system interface, the view of the **report query form** was modified. Now, the drop-down list with all accessible filters is available in the query form without any additional clicks (see screenshot below). Following sections have an updated form: **Summary report, Orig-Term Report, Balance Report, Profit Report, LCR's list, CDR's list, Calls Rerating, Reports Templates, Rates Analysis, Routing Analysis, Active Calls.**
- The Side-by-Side reports** (report comparison over different periods) are available via the **Compare Period** option in the *Summary, Orig-Term and Profit Report* sections. Click the **+** plus sign near the "Interval" field to enable it. Moreover, when you select one of **Time** parameters for **Group By**, the end date of the *Period 2* will be set automatically to make equal intervals of *Period 1* and *Period 2* (see screenshot below).

! Please note, that the *Side-by-Side reports* are the part of an experimental approach to develop reporting tools. This objective function might be modified according to the client's suggestions.

! When you use "Compare Period" option in the *Summary Report* and *Orig-Term Report* sections, default chart templates will not be accessible.

- You can start a **quick search** by typing filters' names in the bar at the top of *Filters menu*. It will display all filters that have specified letters. If you enter more letters, fewer filters will result.

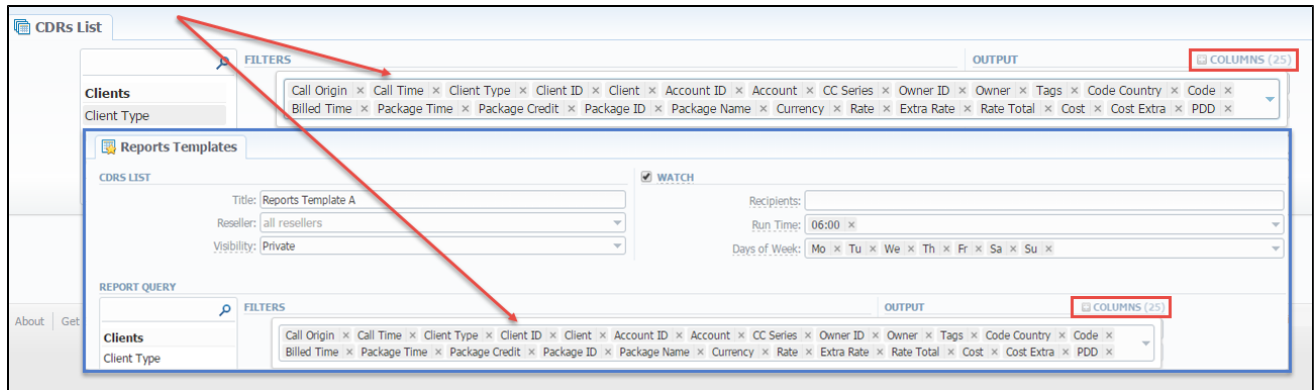
Screenshot: *Summary report section*

- From now on, **Reports Templates** save the order of selected columns in the report. And a new option "**Visibility**" that allows controlling visibility of respective reports templates. Whether you want to keep templates private or leave them visible for users under specified *Reseller*.

To enable this option, select one parameter from the drop-down list:

- Public** - available for users according to the settings of the "Reseller" field;
- Private** - accessible strictly for a creator.

Screenshot: *CDRs List and Reports Templates forms*



 It's allowed to save **Reports Templates** with empty fields.

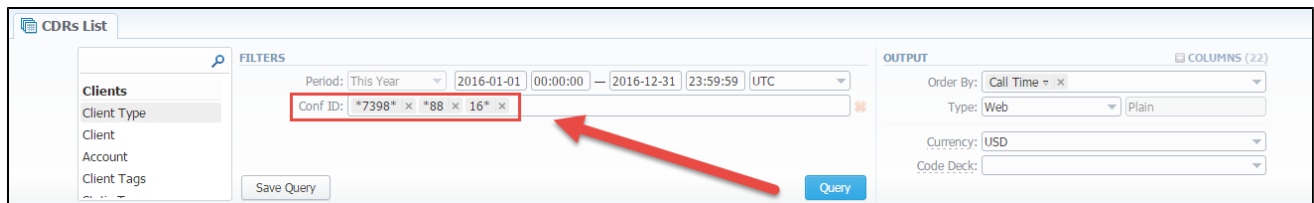
5. Currently, you can filter calls by **partial Conf ID** in the *CDRs list section*. To perform a partial search, please use an asterisk (*) in the "Conf ID" field of the filters sub-panel.

 **How to perform a search by partial Conf ID:**

For example, the Conf ID of a respective call is 1647398901830024226688. To filter calls by:

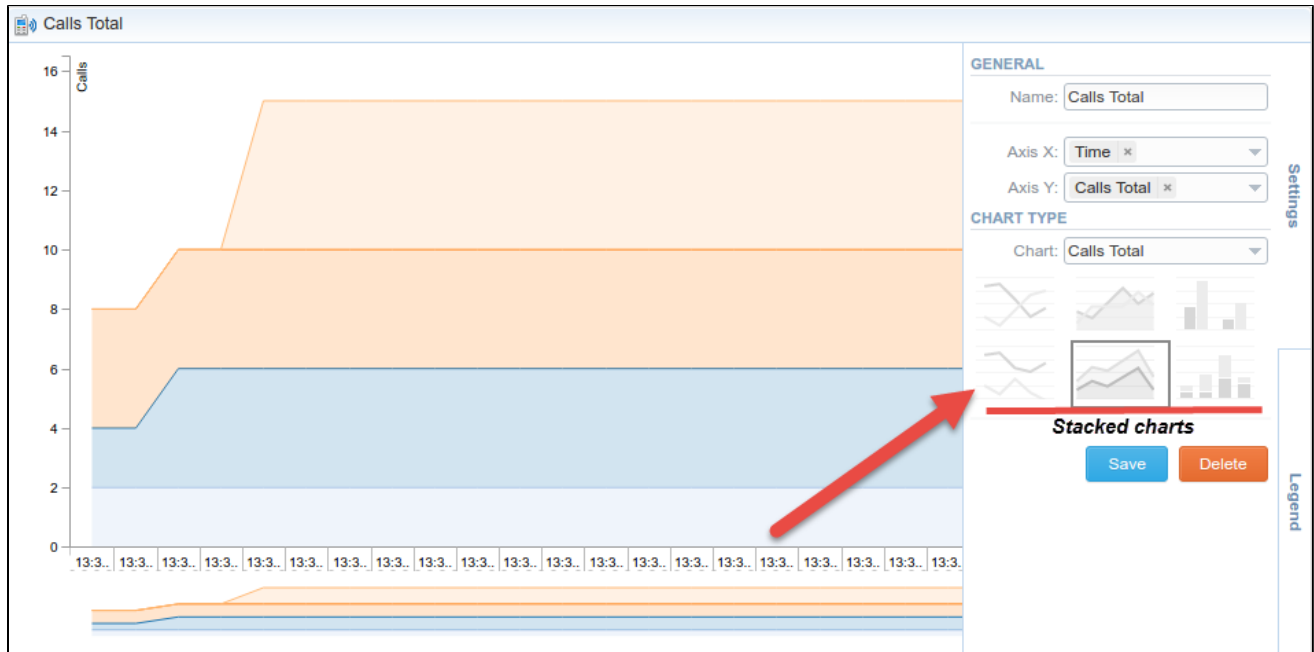
- To filter calls by the **first digits of Conf ID**, enter digits + asterisk(*): **16***.
- To search calls by the **middle digits of Conf ID**, enter a search term by this formula: asterisk(*) + digits + asterisk(*): ***7398***. It will match any Conf ID containing the string 7398, even if it occurs in the middle of a large number.
- To find calls by the **last digits of Conf ID**, enter asterisk(*) + digits: ***88**.

Screenshot: CDRs List section



6. New chart types (**stacked bar/area/line**) are accessible in the *chart type settings*. Use the stacked charts to display cumulative series of values and emphasize the total (see screenshot below).

Screenshot: Chart Settings



Tools

Rates Analysis

In this section, next fields (**Originators**, **Terminators**, **Rate Tables**) are **included by default** in the list of chosen filters per report. So, there is no need to select these fields from the drop-down list of filters.

Screenshot: Rates Analysis section

Factors Watcher

1. Now, Factors Watcher tool *allows blocking all number of the client or account*, if you group by the client/account respectively. A while ago it was only possible to block by code/code name. To configure these settings, you need to:

- 1) open the **Tools Factors Watcher** section;
- 2) create a new factors watcher and group by the *Client/Account*;
- 3) open again already created factors watcher;
- 4) then, add a rule and choose **Block Client/Account** in the "Action" column.

Thus, a new preset with ***code** (i.e. all numbers) for specified *Client/Account* will appear.

✔ The options *Block Client/Account* will be invisible if you skip the second step (i.e. create a new factors watcher and group by the *Client/Account*) and "Group By #" fields are empty. If you group data by the *Client*, the option "Block Account" won't be visible in the drop-down list of the "Action" column.

Screenshot: Factors Watcher settings

Factors Watcher Factors Watcher example

[Add rule](#)

Priority	Match				Factors	Action	Lock Period	Periodic lock	Expiration Date	
0	origination					Alert	0 min	<input type="checkbox"/>		


Match — you can use "*" wildcard in these fields.

Factors — you should list watch rules in this field delimited by ";". List of correct fields:
 - time_total, time_billed, acd_std, acd_cur, pdl, scd, time_package - with measurement unit: minutes;
 - calls_total, calls_notzero, calls_success, calls_busy, calls_nochannel, calls_error - with measurement unit: numbers;
 - cost_total, rate_avg - with measurement unit: money;
 - asr_std, asr_cur - with measurement unit: percentage (%).

[OK](#) [Cancel](#) [Apply](#)

2. Moreover, you can **add a time profile** in the *Factors Watcher* settings. When you choose the time profile, it will take into account the statistics in the *Factors Watcher* according to the chosen value, for example at peak times.

✓ However, if you click the "Test Query", it displays the statistics without the selected time profile.

3. The **quantity of active presets is visible** in the "Presets" column of the *Factors Watcher* section. Click the icon  in this column for quick access to the full list of presets for proper factors watcher.

4. The users can add the Factors Watcher based on the side-by-side Summary Report. All you need to do is:

- open *Factors Watcher* section and click the "New Factors Watcher" button;
- fill out the "Name" field and others according to your needs;
- then specify intervals in the next fields: "Analyze interval of", "Period Start" and "Period Offset".
- and click the "Test Query" button.

5. Also, **new parameters for rules** are available among the list of factors. For example: **cost_total_1** (of the 1st period), **cost_total_2** (of the 2nd period), **cost_total_diff** (difference in %).

Therefore, you can adjust factors by your own using the next formula and pre-existing factors: *factors_name_1* - value for the first period; *factors_name_2* - value for the second period; *factors_name_diff* - a difference between periods.

You can find an example on the screenshots below:

Screenshot: Factors Watcher settings

Factors Watcher Factors Watcher B

[Add rule](#)

Priority	Match				Factors	Action	Lock Period	Periodic lock	Expiration Date	
0	origination			vcs4	asr_cur_diff < -10; acd_cur_diff < -20	Alert	55 min	<input type="checkbox"/>		

Match — you can use "*" wildcard in these fields.

Factors — you should list watch rules in this field delimited by ";". List of correct fields:
 - time_total, time_billed, acd_std, acd_cur, pdl, scd, time_package - with measurement unit: minutes;
 - calls_total, calls_notzero, calls_success, calls_busy, calls_nochannel, calls_error - with measurement unit: numbers;
 - cost_total, rate_avg - with measurement unit: money;
 - asr_std, asr_cur - with measurement unit: percentage (%).

You can adjust factors indicated above with reference to side-by-side reports by the next formula:
 - factors_name_1 (e.g. time_total_1) - value for the first period;
 - factors_name_2 - value for the second period;
 - factors_name_diff - difference between periods.

[OK](#) [Cancel](#) [Apply](#)

Summary Report

FILTERS

Period 1: Custom 2016-06-23 15:52:47 - 2016-06-24 15:52:47 UTC
 Compare Period 2: Custom 2016-06-22 15:52:47 - 2016-06-23 15:52:47
 Client Type: Client
 Owner: test
 Group By: VoIP Gateway x Client x Call Origin x

OUTPUT

Order By:
 Limit: No limit
 Type: Web Plain
 Currency: USD
 Code Deck:

Export to CSV Export to XLSx Show Chart

VoIP Gateway	VoIP Gateway ID	Client	Call Origin	Cost Total P1	Cost Total P2	Time Package P1	Time Package P2	ASR Cur P1	ASR Cur P2	ACD Std P1	ACD Std P2	ASR Std P1	ASR Std P2	ACD Cur P1	ACD Cur P2	PDD Avg P1	PDD Avg P2	SCD Avg P1	SCD Avg P2	Average Rate P1	Average Rate P2	CDRs List P1	CDRs List P2
vcs4	12	All destinations	termination	0.0000	-0.3087	0.00	0.00	0.00	62.86	0.00	1.30	0.00	85.29	0.00	1.72	0.00	0.00	0.00	5.50	0.0000	0.0082		
vcs4	12		termination	0.0000	-1.0733	0.00	0.00	0.00	57.69	0.00	0.63	0.00	70.83	0.00	0.72	0.00	0.00	0.00	3.20	0.0000	0.1000		
vcs4	12		origination	0.0000	14.5000	0.00	0.00	100.00	0.00	1.98	0.00	100.00	0.00	1.98	0.00	0.00	0.00	0.00	4.50	0.0000	0.4567		
vcs4	12		termination	0.0000	-2.7500	0.00	0.00	0.00	100.00	0.00	1.83	0.00	100.00	0.00	1.83	0.00	0.00	0.00	5.00	0.0000	0.3000		
vcs4	12		termination	0.0000	-0.5922	0.00	0.00	0.00	27.27	0.00	0.62	0.00	55.56	0.00	1.04	0.00	0.00	0.00	3.00	0.0000	0.1900		
vcs4	12		origination	0.0000	2.8550	0.00	10.00	0.00	47.54	0.00	0.73	0.00	71.43	0.00	1.00	0.00	0.00	0.00	4.52	0.0000	0.1500		

6. The **Factors Watcher** section has **auto-complete drop-down lists** for following fields of the "Match" column: *Client, Account, Code, Code Name, VoIP Gateway* (see screenshot below). It's implemented to prevent users from entering wrong data.

Routing

Routing Plans

You can also **add tags** to the routing rules. Therefore, *Routing Rules* tab has these fields: **"Originator Tags"** and **"Terminator Tags"**.

- **"Originator Tags"**- you can here specify respective orig tags assigned to the account, client or client's template. If nothing is specified, it works for all.
 - all** - applies for originators with all next specified tags.
 - any** - applies for originators with at least one of next specified tags.
- **"Terminator Tags"** - here you can add term tags assigned to the account that that will be used for terminators. If nothing is indicated, it works only for terminators without tags. Please note, this parameter available only for dynamic rules.

Screenshot: *Routing Rules* tab

Routing Rules Import / Export Routing Plan 123123123123 Search...

add rule Rows 1 - 2 of 2 20 Page 1 of 1

Priority	Code	Code name	Type	Terminator / Policy	PM	Params	Capacity	Stop Hunt
1	1	USA Proper	Dynamic	Simple Quality		TP: all time Orig Tag: Term Tag:		
1		USA Proper	Dynamic	Simple Quality				

Time Profile: all time
 Number Length: - digits
 Balancing: 100 %
 Originator Tags: Any
 Terminator Tags: Any

Configuration

From now on, it's not possible to delete or archive a tax profile assigned to the *Client, Call shop, Reseller, Calling card*.

Payment Terms

1. We extended the facility to set automatic **customer reminder emails**. Thus, your customers can receive an **overdue payment notification**.

From now on, the *Payment Terms* form has a new field **"Notify Days (After)"**. Here you need to specify **how many days after the payment date** reminders will be sent to the client and then apply these payment terms to the client. As a result, the system will send reminder notifications via email on the respective dates. It helps to take the stress out of chasing late payment.

Screenshot: *Payment Terms* section

Payment Terms configuration form. Fields include: Name, Payment (every 7 days), Grace Period, Notify Days(Before) (7 day(s) before due date), and Notify Days(After) (day(s) after due date). A red box highlights the Notify Days(After) field, with a red arrow pointing to it.

- From now on, you can **add the rounding rule** for client's balance while low balance notification. For example, to round up to 2 decimal places you need to add the variable `$(client['balance'])` in the **Mail template: Low balance notification** of the Reseller settings and specify the number of rounding decimals in the "Totals precision" in the **Currencies**.

Screenshot: Reseller's settings

Reseller's settings form. Sections include: SYSTEM INFORMATION, TERMINATOR SETTINGS, FRAUD PROTECTION, ORIGINATOR SETTINGS, INVOICING INFORMATION, EMAIL RATES IMPORT SETTINGS, SURETAX SETTINGS, CONTACT INFORMATION, and COMPANY LOGO. A red box highlights the 'MAIL TEMPLATE: OVERDUE REMINDER' option, with a red arrow pointing to it.

- Due to payment terms improvements, the *Reseller* form has a new **Mail Template: Overdue Reminder**. This template is used when the system sends a payment notification to the Client according to the settings of the "Notify Days (After)" field in the *Payment Terms* section.
- When you set up **payment notifications** related to the invoicing (*Invoice*, *Invoice Unpaid Reminder* and *Overdue Reminder*), **the invoice** that you're reminding the customer about **will be sent attached to this email notification**. It's useful in case the client lost or deleted the original invoice.

Tags

JeraSoft team has implemented **tags** that will enable to organize resources more flexible for your billing environment. From now on, new section **Tag** is available in the *Configuration*. Implemented tags provide an advanced work with **international** and **local calls**.

You can apply tags to almost any object in the system: clients, client's templates, accounts, packages, VoIP gateways, rates, routing rules, traffic processing rules, DiDs, taxes profiles.

Basically, tags were integrated to replace previously existing groups (*i.e. orig, term, DID, rate and VoIP host groups*) for unifying VCS functional interface. The tag provides similar functionality as an assigned group. Therefore, an attached tag provides the same functionality as an assigned group. However, with tags, it's easier to manage rates, routing plans/rules, organize clients, filter data in the report, configure routing process by A-number, etc.


! Please be aware, that **Groups were completely removed from the system**. However, **your configurations with groups will be saved**. You will have tags with the same names as they were in groups. But notes of groups will be permanently deleted.



1. **To get started with tags**, you do not need to open the *Tags* section. You can add the tag right in the settings of *clients, client's templates, accounts, rates, VoIP gateways, routing rules, traffic processing rules, packages, DIDs* that you would like to be tagged in the future.
2. Please, **avoid using commas** in the name of the tags.
3. You can provide an **unlimited number of tags** for each resource.
4. Use the "at" (@) sign as a **default tag for rates**.
5. Also, you can **see tags that you created** in the system and **those belonging to your Reseller**.


Screenshot: Tags section

Name	Reseller
Rates within Europe	AutoTest_Company
Regular	AutoTest_Company
Tag A	AutoTest_Company
Tag B	AutoTest_Company
Tag Group B (orig)	AutoTest_Company

 We strongly recommend that you properly configure rates and assign tags. If you configure in the way that some rate tables will have several accessible tags, it will work randomly

Also, you can find out **tags that were used while the call processed in the CDRs list**. These new columns are available for creating a CDRs report:

- **Client Tags** — respective labels that are assigned directly to the *Client*.
- **Static Tags** — tags assigned to *Accounts, Clients* and *Clients Templates*. It's used for reports, invoices, billing and routing. Routing rules are matched by originator tags in the next priority: account orig tags, client tags, client template tags.
- **Dynamic Tags** — labels added to the call during *Traffic Processing*.
- **Rate Tag**— tag that was taken for regular rate
- **Extra Rates Tag** — tag that was taken for an additive rate

 For more information about tags, read the article "[Tags](#)" in our *User Guide*.

Invoices Templates

1. We extended the functionality of the "**Included calls**" option that is located in the "*Attached CDRs list to the invoice*" drop-down menu. Now, you can select following optional parameters:

- a. **All payable** - allows including calls with any duration that have non-zero costs and use packages.
- b. **Non-zero payable** - permits including calls with a non-zero duration that have any cost and use packages.

Best practice example

When you select "**Non-zero payable**" parameter in the "*Attached CDRs list to the invoice*" menu, then:

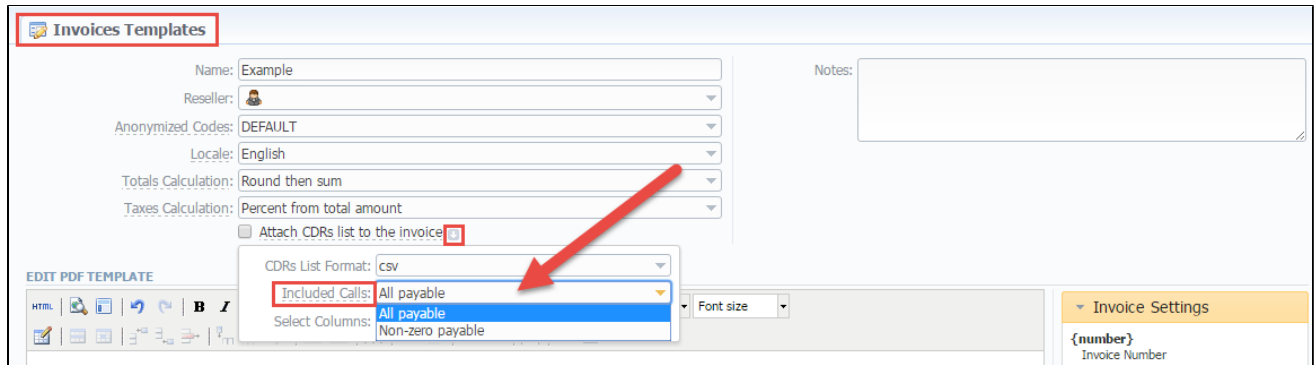
1) created **outgoing** Invoice for Client **will have attached CDRs file with**:

1. incoming/outcoming non-free calls, that should be paid by the Client
2. outcoming free calls with non-zero duration
3. outcoming free calls by package volume limits with a non-zero duration

2) created **incoming** Invoice for Client **will have attached CDRs file with**:

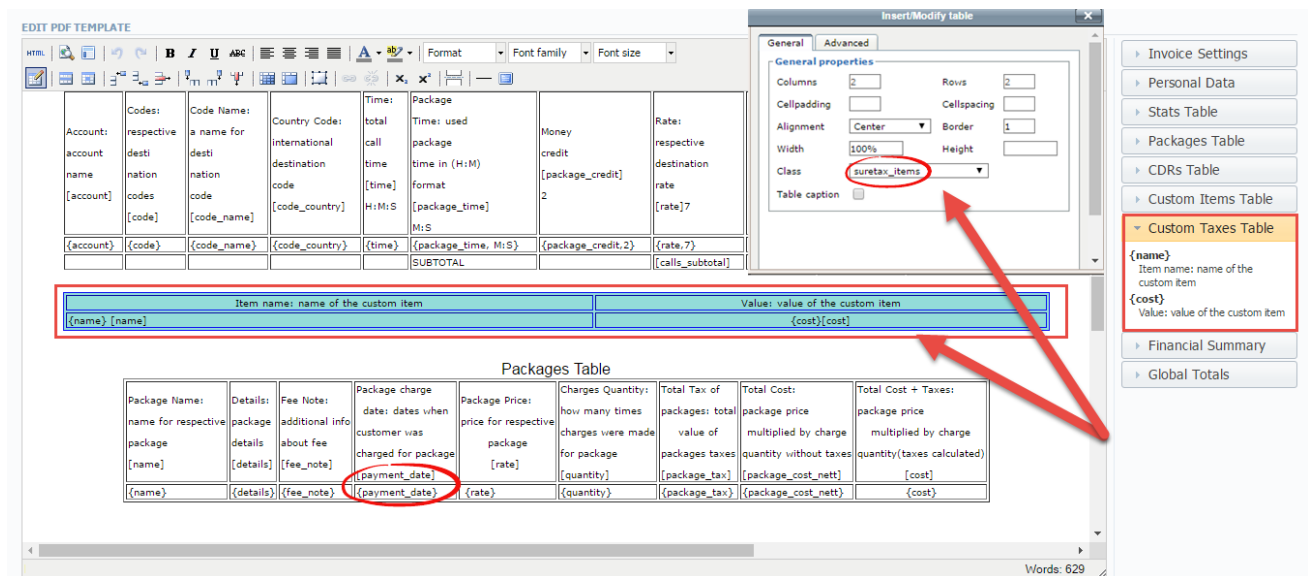
1. incoming/outcoming non-free calls, that should be paid to the Client
2. incoming free calls with non-zero duration
3. incoming free calls by package volume limits with non-zero duration (it's applicable in the case of usage of termination limits)

Screenshot: Invoices Templates settings



2. Invoice Templates have a new group **"Custom Taxes Table"** with variables: *name* and *cost*. While creating taxes table, the table class should be **"suretax_items"**.

Screenshot: Invoice Template settings



4. Now you can add **filtration by the static tags** to the attached file of CDR's list. First, enable **"Attach CDR's list to the invoices"** option. Then, select a respective column (*Static Tags*) in the **"Attach CDR's list to the invoices"** drop-down menu.

5. The parameter **{group_notes}** was removed from the *Invoices templates*. If you need to use this variable, please add respective notes manually in the invoice template.

6. The parameter **{vh_group}** was changed to **{vh_tag}** in the *Stats Table* settings of *Invoices templates*. Please, rename this parameter in your templates to make it work properly.



Please note:

1. For proper usage of SureTax, the *Invoice Number* should contain only Latin and numeric characters. Max length is 40 symbols. *Dst* and *Src Numbers* should be in format *NPANXXNNNN* (10 digits).
2. *CDRs table* of the created invoice displays calls according to the settings of **"Attach CDR's list to the invoices"**
3. *Stats table* of the created Invoice shows calls included in the *CDR's table*.

7. New column **"Cost"** is available for usage in **invoices** and **invoice templates** only in the ***xls** format.

Settings

1. New possibility to create an invoice with zero amount. Check out this option in the **Configuration Settings**. To enable this feature, tick the **"Allow zero invoices"** check box in the **Invoicing settings** sub-panel.

2. Moreover, the **"Round monetary value"** was integrated for invoices. This option forces the values in the CDR's report and CDR's files to be **rounded according to currency settings**. To activate it, go to the *System Settings* and tick the **"Round monetary value"** check box.

VoIP Gateways

1. Due to the modifications of LNP/MNP module, *VoIP Gateways* settings has a new field **"Gateway Type"** with following options:

- **VoIP** - general VoIP gateway that uses SIP, RADIUS, CDR files.
- **LNP/MNP** - a special type of gateway that is used to download LNP/MNP file updates.

2. The number of built-in types of *Files Downloader* is increased and now it's available to choose next types:

- **IMAP** - mail mode to download files.
- **Web (Numuri)** - web mode to download files.

3. **LNP Files Collector** check box allows to enable special file collector that processes downloaded LNP/MNP files and stores them in the database.

Screenshot: *VoIP Gateways settings*

LNP/MNP Databases

This section represents LNP/MNP local databases of two providers: **Numuri** and **TJA**. Here you can find the list of Numuri ranges and TJA numbers downloaded by LNP Files Collector. It's intended to facilitate the administration of number portability.

JeraSoft VCS is integrated with other providers: *Broadvox*, *Vera Networks*, *PCT*.

To find more details about this module and configurations of external data download, open the article ["LNP / MNP Databases"](#) in our User Guide.

Screenshot: *LNP/MNP Databases section*

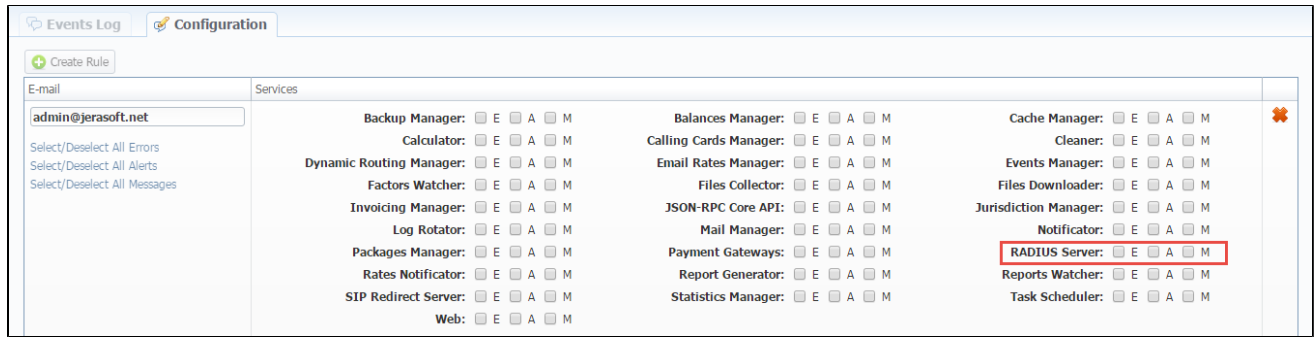
ID	Range Start	Range End	Owner	Modification Date
364	21000	21999	EU Carrier 1	08/29/2016 15:00:00 +0300
365	22000	22999	EU Carrier 2	08/29/2016 15:00:00 +0300
366	23000	23999	EU Carrier 3	08/29/2016 15:00:00 +0300

System

Events Log

Previously existing *RADIUS* configurations (*i.e. RADIUS Accounts/Destinations/Fraud Protection/Routing*) were removed due to the changes of logging on the *RADIUS* server. Now, *RADIUS Server* configuration includes all *RADIUS* settings mentioned above.

Screenshot: *Events log settings/Configuration tab*

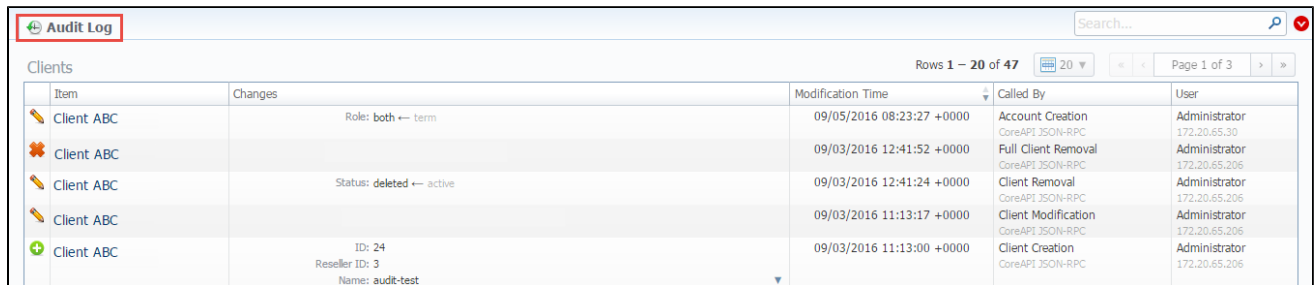


Some loading messages are removed from this section. For example, the alert message for downloading factors watcher is disappeared from the *Events log*. Moreover, the error message of an archive creation of the Backup Manager will be further displayed as an alert message.

Audit Log

A visual representation of this section is modified and the *Quick Search* functionality is extended. Now, you can find logs separately corresponding to a respective action (*creation/modification/removal*) or according to context elements (*Clients/Accounts/Calling Cards/Rate Tables/Invoices*).


Screenshot: *Audit log section*



Now, when you delete a client from the system, his history form will be disabled in the *Audit log* section.

Mail Queue

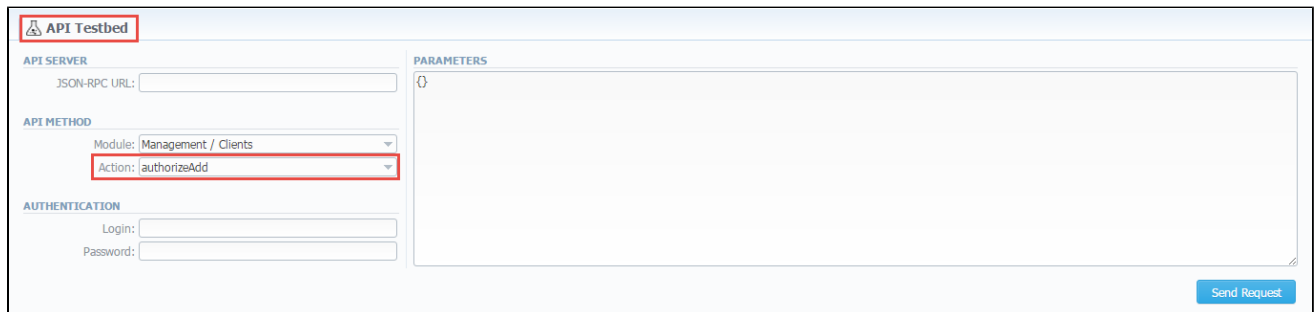
The quick search tool of the **Mail Queue** section was updated:

- You can make a search of the full list of emails by the **Reports Watcher** and **Rates Notificator** parameters. To do this, click the arrow down  on the search toolbar and select a respective parameter in the **"Type"** field.
- New modes **"Nofity (After)"** and **"Nofity(Before)"** are accessible in the **"Type"** field of the search form.

API Testbed

Now, a special API method **"clients/authorizeAdd"** allows adding a pre-configured [Authorize.net](https://authorize.net) client's profile. It enables to transfer the client's credentials via API and there is no need to register the client via *Client's Panel*. It includes next parameters: *id_clients*, *id_customer_profile*, *id_payment_profile*.

Screenshot: *API Testbed settings*



Roles

1. From this version, a created user can **assign the role with respective permissions**. Therefore, if the user has access to create roles, he can assign the role with permission similar to his own or less than it.
2. Now, the user with disabled *Management/Clients* module in the **Roles section** will not see the Clients List from the *Clients Panel*.

Client's Control Panel

1. Now, the Client can see in his statistics the packages currently assigned to him (active, pre-activated) or used (archived) previously. All other packages of the Reseller will be invisible for this Client.
2. Also, when you delete the client (i.e. its status is "*Deleted*" in the *Client's settings*), its login/password for access to the Client's Panel will be reset and you can use it for another client.