

JeraSoft Billing 3.9.1

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JeraSoft is pleased to announce the release of VCS 3.9.1, which has some additions and improvements. This document describes the features with most impact on system's functions and also provides with information regarding their usage.

Security

JeraSoft development team is focused on taking care of our customers' security. That is why, we increase the security of our system for preventing threats, attacks and vulnerabilities by adding extra security checks.

Please note!

The following checks are performed:

- The existence of local user "jerasupport";
- The resolvability of a.jerasoft.net by DNS;
- Are SSH / HTTPs ports open for Trusted / Extended networks.

So, if the above conditions are not met, web access to the system will be blocked.

General

1. New variable appears in the *pdf* invoice template, i.e. **{total_cost_gross_text}** that is used for the text representation of the total sum for all charges. For correct functioning of this {total_cost_gross_text} parameter, the currency names should correspond to the official ISO 4217 standard, i.e. EUR, USD, CAD.
2. PayPal fee functionality becomes fully automatic. That means, Fee settings in *Payment Gateways PayPal* section were entirely removed, and now all calculations are made automatically.
Please note that the charged amount includes the PayPal fees. For example, if customer pays 100.00 USD by credit card and the fee for each transaction is 3% of the full amount (3.00 USD), then customer's balance will be recharged for 97.00 USD.
3. The re-rating modes are removed from *System Settings* 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.
4. Starting from this version, *Factors Watcher block notifications* become optional, i.e. you can enable or disable them in Clients form.
5. New option appears in New Client form, i.e. "Postpaid" check box. If postpaid mode is enable the client doesn't have unlimited credit. It is disabled by default.
6. From now on, the configuration "Orig Group" is available in Client's settings (form). This option allows to override *Orig Group* values automatically from all accounts assigned to the following Client.

Screenshot: New Client's form

New Client

SYSTEM INFORMATION

Name:

Reseller: **AUTO Reseller - 111**

Currency: **USD**

Timezone: **default (UTC)**

Status: **Active**

Client's Template:

Groups:

Tax Profile:

Bill Calls by: **disconnect time**

Hidden Numbers

CLIENT PANEL

Login:

Password:

Access:

TERMINATOR SETTINGS

Rate Table:

Capacity: channels

ORIGINATOR SETTINGS

Postpaid: 0 USD

Payment Terms:

Rate Table:

Routing Plan:

Orig Groups:

Capacity: channels

LOW BALANCE NOTIFICATION

Notify Client: USD

Notify Admin: USD

AUTOINVOICING

Template:

Last Invoiced:

RATE NOTIFICATION

Format: **Excel CSV**

Notify type: **All rates**

AUTO PAYMENT

Extra Amount: USD

COMPANY INFO

Name:

Main E-mail:

NOC E-mail:

Notify about Factor Watcher blocks

Billing E-mail:

Rates E-mail:

Address:

Tax ID:

Reg ID:

Account Details:

Locale:

OK **Cancel** **Apply**

Routing

New functionality appears in Routing Plan, i.e. "Routing loop protection" check box. That allows calls from one account of the client to another account of the same client. It is enabled by default.

Screenshot: Routing Plan

New Routing Plan

GENERAL INFORMATION

Name:

Reseller: **AUTO Reseller - 111**

Parent Routing Plan:

Code Deck:

Origination Limit:

Termination Limit:

Routing loop protection

RULES PROCESSING

Rules Hunting: **longest only**

DR Order: **by code / appeal**

PM: 0 [USD / %]

Vendor Limit:

OK **Cancel** **Apply**

Tools

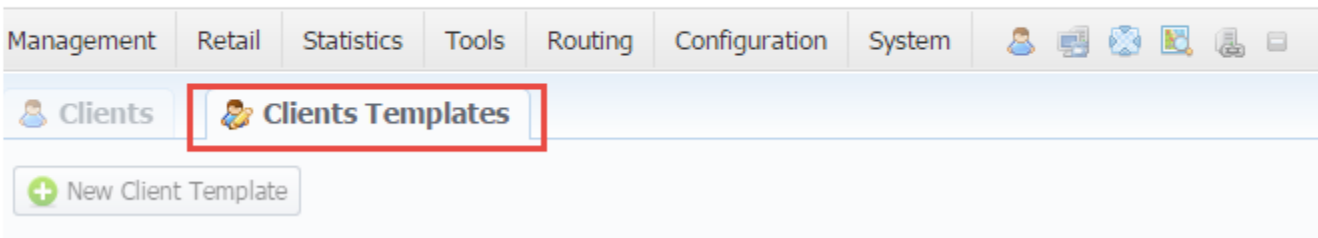
Now rates can be analyzed and compared within all rate tables, originators or terminators using **Rates Analysis tool**.

Screenshot: Rates Analysis search form

Clients Templates

Also, we upgraded the **Clients Templates** tab and there are new interface and functional properties added for making our clients more productive with JeraSoft billing solution. Please see the Clients Templates page for more details.

Screenshot: Client Template section



Tip: In cases when the values (*i.e* Groups, Credit, Rate Table, Routing Plan, Orig Groups, Capacity, Notify Client, Notify Admin) are not specified in the Client's settings, the **Clients Templates** tool allows to take the following values from templates (*i.e.* during authorization) but they **will not be shown** in the **Client's settings**.

For example, when there are no specified values in the Client's settings, they will be taken from assigned template. When there are no values in the template assigned to the Client, they will be taken from *Manager/Reseller's settings*.

Now in *Reseller section* there is an option for *Manager/Reseller* to set a *Client's Template*, *i.e.* 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* (configuration window will pop-up);
- fill out the *Client's Template* field by selecting a template from the drop-down list.



The icon of "*Clients Templates*" (existed in the previous version in Clients section) is removed. Now you need to choose the template from the drop down list that appears with templates available for use.

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



And we upgraded interface settings of the *Client Template* and several fields such as: *Bill calls by*, *Client's package name*, *Access of the Client Panel* have been removed by architectural considerations.

Screenshot: New Client Template



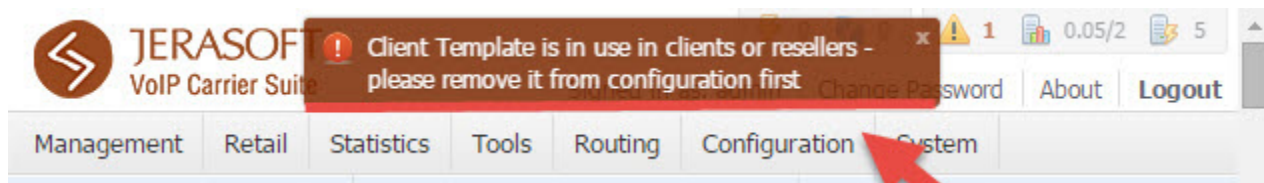
The values overridden from templates, i.e. Routing Plan, Rate Table, Credit, are displayed only on the Client list. They will not be shown on the Client's account.

Functional properties

1. If there are no indicated values (such as Groups, Credit, Rate Table, Routing Plan, Orig Groups, Capacity, Notify Client, Notify Admin) in the Client's Settings, it will automatically override these values from the closest template.
2. The closest template is considered a first template found by following chain: Client his Manager his Reseller
3. If there are no found values mentioned above in the closest template, a further search stops and values are not defined.

When you remove the template, there is a validation of use this template by Client, Manager or Reseller. The pop-up window with notification will appear.

Screenshot: Removing template



Reports

1. If the credit overridden from the template is applied for the Client, the act of adding the package in Clients/Account section will meet with failure. This option will appear in the next version.
2. The drop-down list of available templates for the *Client/Reseller* is the similar for *Routing Plans, Rate Tables*.
3. The change of the Reseller proceeds without any checks of application of this template by the Client/Manager/Reseller.
4. The currency indicated in the *Client Template* and the currency of the customer to which it applies should be the same to work properly.
5. All *Managers*, regardless of a nesting level, have possibility to see the full list of templates that belong only to their *Reseller*.

Check out *Clients Templates* page for more information about the latest modifications and advantages of this feature.

Integrations

We are happy to announce that integration with ITooLabs Cloud PBX has been successfully completed. This integration creates a stable, well-tested and carrier-suitable solution for users of both ITooLabs Cloud PBX and JeraSoft VCS.