Clients

In this article

Section overview

Beyond any doubts, clients are a cornerstone and the most valuable asset of any type of business. Hence, **Clients** section is rightfully considered as a core element of the whole **JeraSoft VoIP Carrier Suit**. In the section, user can manage personal information of any client on the list, trace customer's balances, review resellers a particular client belongs to, etc. The section is presented in a form of a table with the following columns:

Screenshot: Clients section

Column Name	Description	
ID	Client's identification number	
Name	Client's name	
Balance	Client's balance values	
	• ***Available***	'Live' client's balance including allowed credit
	• ***Live***	Client's balance calculated on a basis of performed payments and processed calls
	• ***Fixed***	Client's balance calculated on a basis of the outstanding invoices and performed payments
Pay Terms	Payment terms of each client	
Tags	List of tags, applied to a client	
Reseller	Name of the reseller's company respective client belongs to	

Functional buttons and **icons**, presented in the section, are as follows:

Button/Icon	Description
New Client	Allows adding a new client to the system

Export List	Allows exporting a list of user's clients in a **.csv** file	
Mass Edit	Allows management of last invoice date of a client	
	Identifies the Orig client	
	Identifies the Term client	
	Identifies the Orig/Term client	
	Allows accessing the list of client's accounts in the **Accounts** section (icon will be colored if any account is assigned)	
	Allows accessing client's current routing plan (icon will be colored if a plan is assigned)	
	Allows accessing the **Traffic Processing** section for dynamic routing management	
	Allows viewing client's rates (icon will be colored if a rate table is assigned)	
	• ***ORIG***	Rate tables for origination calls
	• ***TERM***	Rate tables for termination calls
	Allows accessing the **Client Packages** section for new clients packages management	
	Allows accessing the **Transactions** section for management of client's balance	
	Allows accessing the **Invoices** section for client's invoices management.	
	Allows accessing the **Balance Report** section to manage client's balance report (Live or Fixed)	
	Allows accessing the **Summary Report** section to manage client's summary report	
	Allows accessing the **Mail Queue** section to view sent emails history	
	Allows accessing the **Audit Log** section to view change history	
	Allows deleting a client from the system	

Warning

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 its accounts will be turned off. However, its accounts will not be deleted from the system.

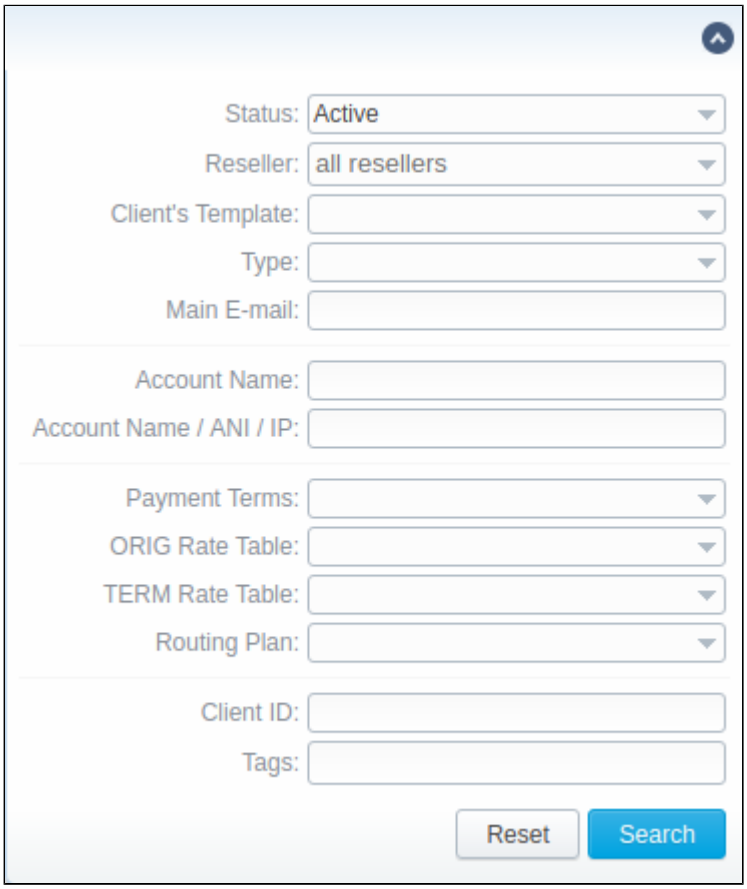
Helpful Tip

- If the prepaid mode is enabled, calls will be subject to balance check on a stage of call authorization (when RADIUS Authorization is used). If the postpaid mode is enabled, calls duration will be limited to ***Max all length*** setting in **Configuration > Settings**.
- You can search through clients by ***Name*** and only by first letters (***start with*** rule). To find all clients with specified main email, use ***** (asterisk) in the ***Main Email*** field.

Advanced Search

In the top right corner of the section above the table, the **Advanced Search** drop-down menu is located. By clicking on a red downwards arrow icon (clients in the section are filtered by ***Active*** status by default), the following drop-down menu is displayed:

Screenshot: Advanced Search drop-down menu

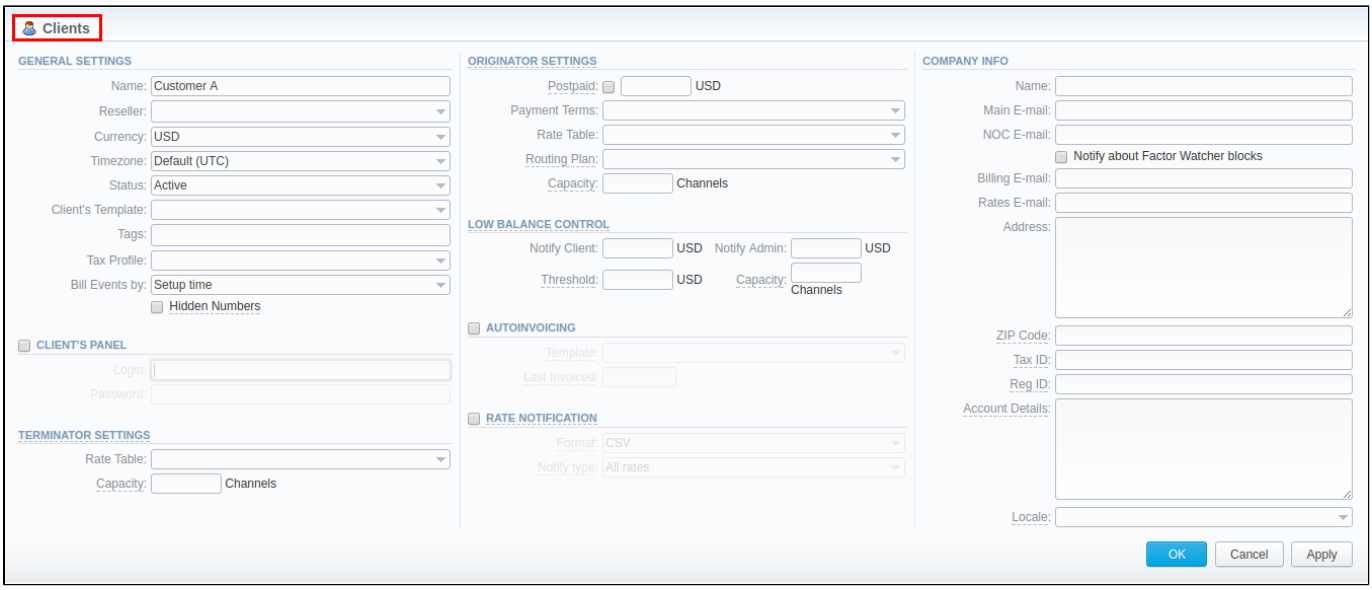


To apply the specified search criteria, press the **Search** button; to cancel the applied parameters, press the **Reset** button.

Adding New Client

To add a new customer to the system, click the **New client** button in a top-left corner of the section. A pop-up window with the following fields will show up:

Screenshot: Adding new client



Information block	Fields & Description	
General Settings	General information about client	
	• ***Name***	Indicate client's name
	• ***Reseller***	Select a reseller new client belongs to (this name will be used in invoices)
	• ***Currency***	Define preferred currency (will be used in invoices)
	• ***Timezone***	Choose the timezone from a drop-down list of all available. This timezone will be used in invoices by default. **UTC** is a default parameter for a timezone ⚠ **Attention** If this parameter is not indicated, the timezone of the database will be automatically applied to the client's settings of the zone. It could lead to some problems while working with packages, rate tables, or time profiles.
	• ***Status***	Select respective status for the client: • ***active*** • ***stop*** • ***deleted***
	• ***Client's Template***	Here you can apply the required template from the list to a new customer
	• ***Tags***	You can indicate tag(s) here that will be applied to a new customer. The tag doesn't need to be pre-existent in the system. You can provide unlimited number of tags for each client.

	• ***Tax Profile***	You can specify a tax profile, which will be reflected in invoices (refers to the **Taxes Profiles** section). • ***SureTax*** is a tax, levied on top of another tax. It allows to manage your compliance with tax law. This profile is used for further calculation in invoices. To get more details, check out the article "How to set SureTax profile?". **Attention** 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 the ***NPANXXNNNN*** **(10 digits)** format.
	• ***Bill Events by***	Select how the system should bill events of a new client – ***by setup time***, ***by connect time*** *or* ***by disconnect time*** (most switch models use **disconnect** time)
	• ***Hidden Numbers*** c heckbox	When checked, it allows you to hide some part of client's destination numbers in invoices, xDR's reports, and during export. **Tip** If the client has the ***Hidden Numbers*** option enabled and the code appears in the code deck from the invoice template, the number, code and code name become hidden. If the code doesn't appear in the code deck, then the last *n characters of the number are hidden. The code deck from the rate table is only used to identify code names.
Client Panel c heckbox	Activates/deactivates the **login** procedure to the client's control panel for this client. Customer can get access to this control panel by using the following link: http://vcs_address/clients/, after filling in the following fields:	
	• ***Login***	Client's login
	• ***Password***	Client's password
Originator Settings	Settings for your customers, who send events to your switch. Clients' origination settings are as follows:	
	• ***Postpaid*** c heckbox	Here you can set needed paid mode for a client. If you enable the postpaid mode, the client will have unlimited credit. It is disabled by default.
	• ***Credit***	Additional field next to the ***Postpaid*** checkbox. Here you can set the **credit limit** allowed for a client. You could fill this field with any positive or negative numbers, but no more than 9 digits. If ***Postpaid*** checkbox is marked, this field becomes **inactive**.
	• ***Payment Terms***	Select the payment terms template from the general list of all available ones in the **Payment Terms** section
	• ***Rate Table***	From the list of all rate tables in the **Rate Tables** section, select an origination one for this client
	• ***Routing Plan***	Select the appropriate routing plan that will be used to route all calls of this customer (but it may be overridden for any of customer's accounts in *Accounts* tab). The full list of routing plans is presented in the Routing Plans section
	• ***Capacity***	Indicate origination capacity of channels for this client. For unlimited amount, leave empty
Terminator Settings	Settings for your vendors, whom you send events from your switch. Clients' termination settings are as follows:	
	• ***Rate Table***	From the list of all rate tables, select a termination one for this client
	• ***Capacity***	Define termination capacity of channels for this client. For unlimited amount, leave empty

Low Balance Notifications	Here you can setup whether the system should make low balance notifications or not when the client's **Available** balance is lower than a set threshold	
	• ***Notify Client***	When clients' balance + credit is below entered value, the system will send a notification to email, specified in the clients' ***Billing e-mail*** field
	• ***Notify Admin***	When clients' balance + credit is below entered value, the system will send a notification to administrator via **Events Log**
	• ***Threshold***	Available balance threshold, below which the special capacity setting will be applied
	• ***Capacity***	Origination capacity limit that will be applied when available balance is below threshold
Autoinvoicing checkbox	Activates/deactivates the automatic invoice generation feature for the current client. Information block parameters are:	
	• ***Template***	Select an **invoice template** for this customer
	• ***Last Invoiced***	Specify the last date when the client was invoiced
Rate Notification checkbox	Here you can enable or disable automatic rates notification for the current client	
	• ***Format***	Select the desirable format of rate notification (.**xls** or .**csv**)
	• ***Notify Type***	Specify a type of notification: • ***All rates*** - full rates list will be sent • ***Only changed rates*** - only changed rates will be sent • ***All rates have unique mode*** - if there are two or more new rates with different effective dates for the same code, several files will be sent, each containing all unchanged rates and only one unique rate for this code **Tip** 1. The system will push a notification after new rates were added. Please note, if the user changes the **Effective Date** field of current rates manually, it won't activate notifications. 2. We recommend using this type of notification for testing purposes. It doesn't cancel a regular notification and doesn't change the last export date.
Auto Payment checkbox	Activates/deactivates the automatic charge from customer's credit card registered in the Authorize.net electronic payment service. Please note that you can register a credit card via the **Refill balance** section on the **Client Panel.**	
	• ***Extra Amount***	Define a payment amount
Company Info	Some additional information about a client can be entered here	
	• ***Name***	Company name
	• ***Main Email***	Company email for general inquiries. Use only Latin characters.
	• ***NOC Email***	Company email for technical related questions. Use only Latin characters.

• ***Notify about Factors Watcher blocks*** checkbox	This tool watches over different parameters and generates alerts if some conditions are met. This function is optional: i.e., you can enable or disable them in the Clients form
• ***Billing Email***	Automatically generated invoices and notifications will be sent to this email address. Use only Latin characters.
• ***Rates Email***	Company email for rates related questions. Use only Latin characters.
• ***Address***	Physical company address
• ***Zip Code***	Postal code for SureTax integration
• ***Tax ID***	Customer's tax ID
• ***Reg ID***	Customer's registration ID
• ***Account Details***	Reference information about client's bank account or payment details
• ***Locale***	Preferred locale, that will be sent as a reply to RADIUS Authorization. It is used for IVR platforms to define the language

Attention

Autoinvoicing tool sends rates in separate files for each time profile used in a certain Rate Table.

Please note, an **email address should contain only Latin characters** for proper work of email notifications and invoices.

Warning

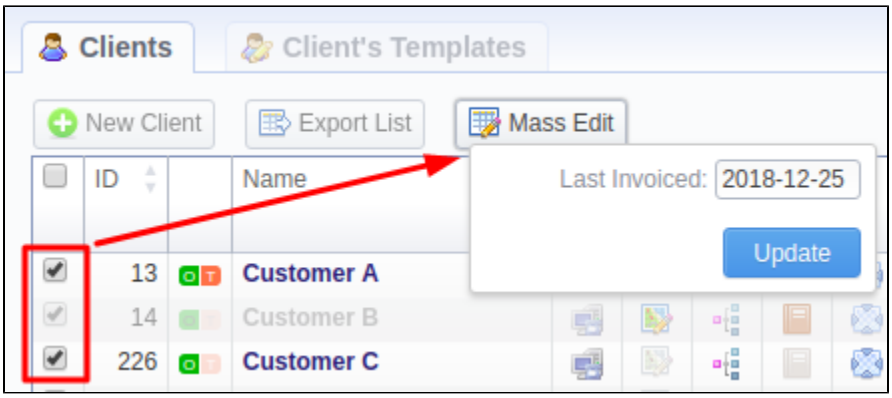
The **Full Delete** button can be used to permanently remove a client from the system, disregarding any statistics or rate tables data connections. Please, use this feature with care – deleted client cannot be restored by any means

Mass Edit

If there is a need to **change last invoice date** (*i.e. the day that the client has already been invoiced for*) for more than one client, you can use **Mass Edit** functionality. Follow the next steps:

- Select target Clients;
- Press the **Mass Edit** button and specify date in the ***Last Invoiced*** field;
- Press the **Update** button.

Screenshot: Mass edit functionality



Clients Templates

This section allows you to create a client template, where you can specify the main information about a client, originator settings, etc. Further, this template can be used to set the billing and tariffication parameters for customers, managers, or resellers in a few clicks. For more details**,** check out a related article: **Clients Templates**.

Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty