Clients Templates

In this article

Tab overview

This tab allows you to create a client template where you can specify the main information about a client, originator settings, etc. Moreover, this template can be used to set the billing and tariffication parameters for Customers, Managers, or Resellers in several clicks.

Screenshot: Client's Templates List

Column Name	Description
ID	Client's template identification number
Name	Client's template name
Credit	Credit volume in a template
ORIG Rate Table	Origination rate table, assigned to this client's template
Routing Plan	Routing plan, assigned to this client's template
Tags	List of client's templates tags
Reseller	Name of the reseller's company respective client's template belongs to

Advanced Search

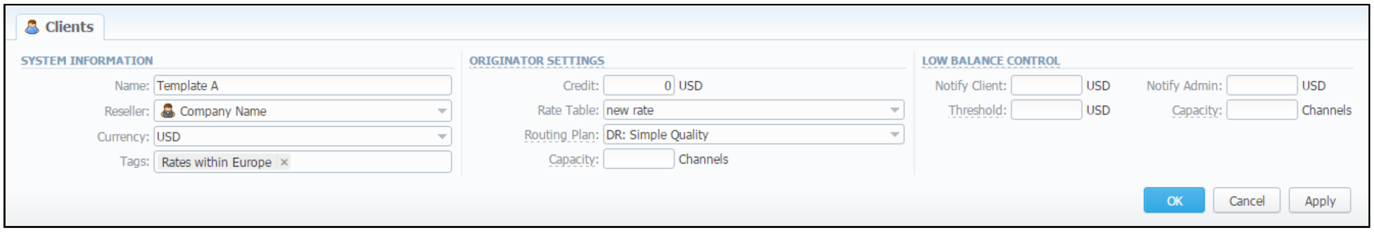
To navigate in the tab effectively, a user is advised to use **Advanced Search** drop-down menu by clicking a blue downward arrow icon in the top right corner of the page.

Screenshot: Advanced Search drop-down menu

Creating a New Client's Template

To create a new template you need to click the **New Client Template** button.
A new pop-up window with the following fields will appear:

Screenshot: New Client Template settings



Information block	Fields Description	
System Information	General information regarding client's template settings	
	• ***Name***	Indicate the title of the client's template
	• ***Reseller***	Select a reseller that will be assigned to this template (this name will be used in invoices)
	• ***Currency***	Indicate preferred currency (will be used in invoices)
	• ***Tags***	Specify tags for a current client
Originator Settings	Billing settings and tariffication parameters for customers, who send the calls to your switch	
	• ***Credit***	Credit limit allowed for a client
	• ***Rate Table***	Select the origination rate table
	• ***Routing Plan***	Select an appropriate routing plan that will be used to route all calls for this customer
	• ***Capacity***	Summary origination capacity for the client
Low Balance Notifications	Here you can set up whether the system should make low balance notifications or not when client's **Available** balance is lower than a set threshold	
	• ***Notify Client***	When clients' balance+credit is below the entered value, the system will send a notification to email, specified in the clients' ***Billing email*** field
	• ***Notify Admin***	When clients' balance+credit is below the entered value, the system will send a notification to an 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 the available balance is below the threshold

Tip

Clients Templates allow you to fill out customer's settings with **standard default values**. If you do not specify the values *(i.e., Credit, Rate Table, Routing Plan, Capacity, Notify Client, Notify Admin)* in the *Client form*, the ***Clients Templates*** will take these values from templates (during authorization).

Please note: the system can fill only empty fields with standard default values overridden from the assigned template. For example, if the client has ***0*** (specified by default) in the ***Credit*** field near the **Postpaid** checkbox, you need to clear it manually. Otherwise, this value will not be taken from the template. But these values **will not be shown** in the **Client form**.

Sample: When there are no values in the Client form, the system will take them from the assigned template. When there are no values in the template assigned to the Client, they will be taken from **Manager's/Reseller's settings**.

Interface properties

The process of applying a template to the client is pretty simple. All you need to do is:

- Go to the **Clients** list, click on the **New Client** button or select the needed client;
- Fill in the ***Client's Template*** field by selecting a needed template from the drop-down list.

In the **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 is:

- Go to the **Reseller** section and select the needed ***Manager/Reseller*** (configuration window will pop-up);
- Fill in the ***Client's Template*** field by selecting a template from the drop-down list.

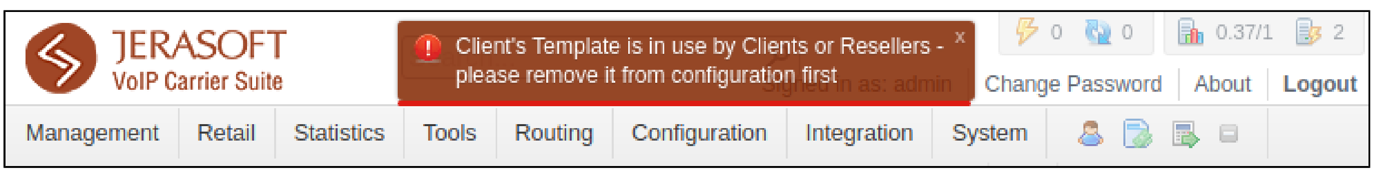
Tip

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

Functional properties

1. If there are no indicated values (such as ***Credit, Rate Table, Routing Plan, 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 the following chain: **Client its Manager its Reseller**
3. If there are no found values mentioned above in the closest template, further search stops and values are not defined.

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



Reports

1. If you want to **change the *Reseller***, you will proceed without any application checks of this template by the ***Client/Manager/Reseller***.
2. The **currency** indicated in the ***Client Template*** and the currency of the customer to which it applies should be the same to work properly.
3. All ***Managers*,** regardless of their nesting level, have a possibility to **see the full list of templates** that **belong to their *Reseller* only.**