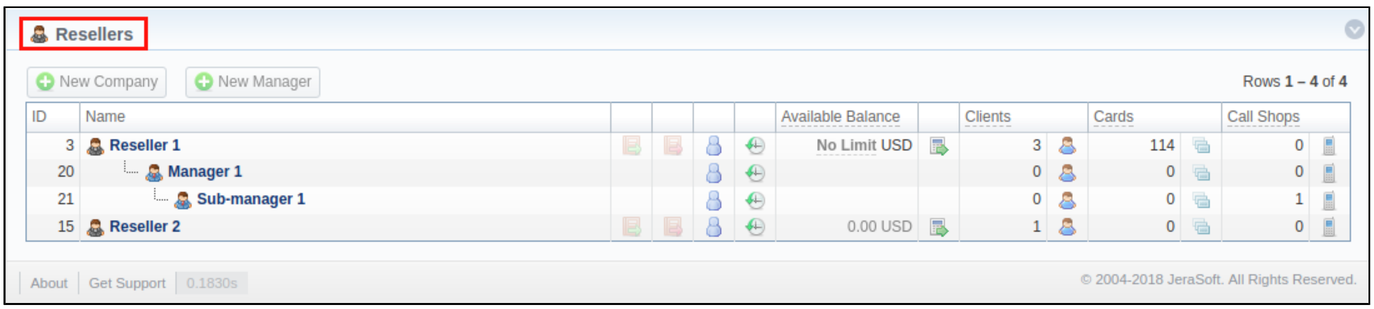
Resellers

In this article

Section overview

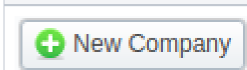
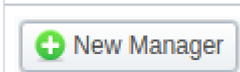
Reseller in JeraSoft Billing, in the majority of cases, is a company that has a certain amount of clients and governs their activities in the system. Like any company, it can have a range of managers, each responsible for a certain group of company clients. The **Manager** has limited functionality: doesn't have his own balance, therefore, cannot perform any transactions; neither origination nor termination rate table cannot be assigned to him, etc. The **Resellers** section is designed to provide a user with a possibility to **track and manage their company information and activity**, **build a hierarchy of company affiliates**, **or assign its managers**. The section is presented in the form of a table with the following columns:

Screenshot: Resellers section



Column name	Description
ID	Reseller's/Manager's identification number
Name	Name of a reseller/manager
Available Balance	Reseller's available balance (live balance + credit)
Clients	The total amount of a respective reseller's/manager's clients
Cards	The total amount of a respective reseller's/manager's calling cards
Call Shops	Total number of a respective reseller's/manager's call shops

The following functional buttons and icons are present in the section:

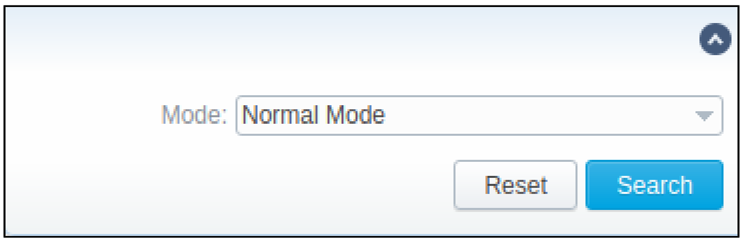
Button/Icon	Description
	Allows creating a new reseller
	Allows creating a new manager
	Allows assigning an origination rate table to a respective reseller
	Allows assigning a termination rate table to a respective reseller
	Allows viewing a list of a following reseller's/manager's users

	Allows viewing history of changes for a respective reseller/manager in the **Audit log section**
	Allows viewing reseller's balance operations in the **Transactions section**
	Allows viewing a list of reseller's/manager's clients in the **Clients section**
	Allows viewing a list of reseller's/manager's calling cards in the **Calling Cards section**
	Allows viewing a list of reseller's/manager's call shops for a current reseller/manager in the **Call Shops section**

Advanced Search

In the top right corner of the section above the table, an **Advanced Search** drop-down menu is located. By clicking on a blue downward arrow icon, a drop-down menu with the following structure is displayed:

Screenshot: Advanced Search drop-down menu



Field	Description
Mode	Select a mode for the resellers' display: • ***Normal Mode*** - only resellers with Active status will be displayed • ***Archive Mode*** - all resellers regardless of the status will be displayed

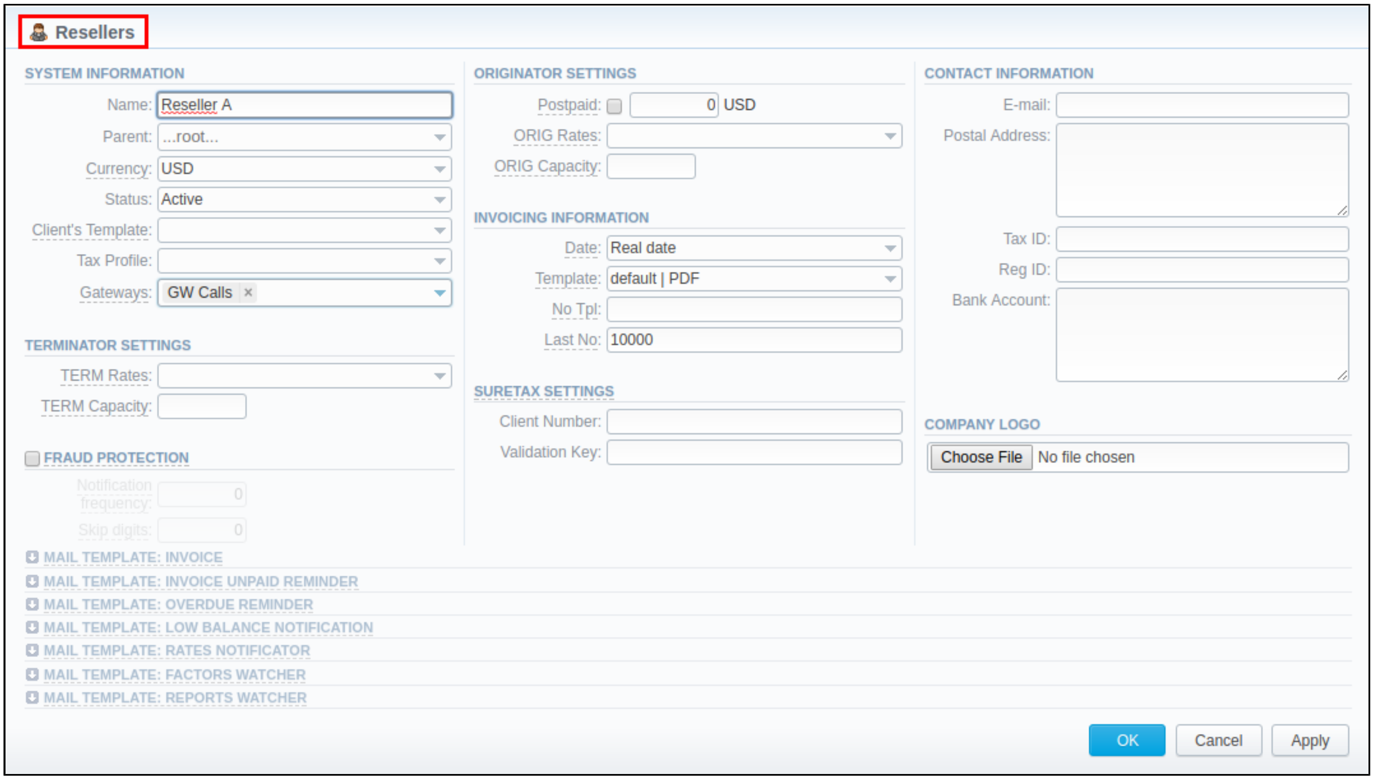
To apply the specified search criteria, click the **Search** button; to cancel the applied parameters, click **Reset**.

Adding a New Reseller

To add a company, you need to:

- click the **New Company** button;
- fill in all the required fields in the appeared pop-up window (see below) and click **OK**.

Screenshot: Adding a new company



Information block	Fields Description	
System Information	General information about a company	
	• ***Name***	Specify the name of one of your companies (or affiliates). This field is mandatory.
	• ***Parent***	Indicate a parent for a reseller or make it a root one. By default, the field value is set to ***root***
	• ***Currency***	Select a preferred currency for rates and invoices from the drop-down list of all available ones (see the **Currencies section**)
	• ***Status***	Define the status of a reseller: • ***Active*** • ***Deleted***
	• ***Client Template***	Select a template that will be used for all clients belonging to this reseller or manager by default (see the **Clients Template section**)
	• ***Tax Profile***	Indicate a tax profile that will be used for this reseller and reflected in invoices (refers to the **Taxes Profiles section**). • ***SureTax*** is a tax, levied on top of another tax. It allows managing your compliance with tax law. This profile is used for further calculation in invoices. To get more details, check out the *US Taxation* article. **Attention** For proper usage of SureTax, ***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.

	• ***Gateways***	Select gateway(s) for this reseller
Terminator Settings		Reseller's billing settings for outgoing calls
	• ***TERM Rates***	Rates for outgoing events from customers under a current reseller. Enables resellers billing mode **Tip** For more information about resellers billing mode, address this article
	• ***TERM Capacity***	Termination capacity for all clients, belonging to this reseller. Leave this field empty for unlimited capacity
Fraud Protection checkbox		Enables/disables administrator notification in case of multiple simultaneous calls to the same number from the current Reseller. **Attention** Please note that all notifications can be found in **System > Events Log**. If you want to receive them to exact email, go to the **Configuration** tab of the **Events Log** section, and add a new rule with the indication of target email and ***aaa.fraud*** value in the ***Tag*** field. Here you need to specify the following:
	• ***Notification Frequency***	Set minimum time in seconds between sent notifications (minimum interval must be ***0 sec***)
	• ***Skip Digits***	Define the amount of the last number digits, which will be ignored when determining a destination number. For instance, with one digit for ignoring, the numbers 123456 and 123457 will be considered the same number.
Origination Settings		Current Reseller's billing settings for incoming calls
	• ***Postpaid*** checkbox	Here you can set a specific payment mode for a client. Postpaid mode means that a client will have unlimited credit. Otherwise, the client's Balance + Credit value will be checked on RADIUS or SIP authorization. When this field is checked, the Credit field becomes unavailable.
	• ***Credit***	The additional field next to the ***Postpaid*** checkbox. User can indicate an amount of reseller's credit
	• ***ORIG Rates***	Specify rates for incoming events from customers under a current reseller. Enables resellers billing mode
	• ***ORIG Capacity***	Indicate origination capacity for all clients, belonging to this reseller. Leave this field empty for unlimited capacity
Invoicing Information		Current Reseller's invoicing settings
	• ***Date***	Allows you to select how the system sets an invoicing date: • ***Real date*** – sets an invoicing date to actual invoicing date • ***Last day*** – sets an invoicing date to date of last day of invoicing period

	• ***Template***	Select an invoice template that will be assigned to a reseller
	• ***No Tpl***	Allows to define a default format of invoice's name
	• ***Last No***	Define the last used invoice number
SureTax Settings	SureTax profile settings. SureTax is a third-party tax calculation engine. This tax calculation is based on the location of the customer's taxing jurisdiction. This profile is used for further calculation in invoices. To get more details, check out the article: US Taxation	
	• ***Client Number***	Specify a unique number that identifies an individual in the SureTax service
	• ***Validation Key***	Define a unique validation key of the SureTax service
Contact Information	Some additional information	
	• ***Email***	Company's email (it is required to specify an email to receive notifications). Use only Latin characters. This field is mandatory
	• ***Postal Address***	Company's postal address
	• ***Tax ID***	An ID of the tax-paying entity
	• ***Reg ID***	Company's registration ID
	• ***Bank Account***	Company's bank account info
Company Logo	Here you can add a file with a company's logo. To delete the company logo, open the edit form of a respective Reseller with a logo, then click the delete icon to remove the old logo.	
Mail Templates	A detailed description of all Mail Templates and their configuration is presented at the end of the article	

Attention

- Changes in Resellers' settings will not be applied instantly. They will be automatically reloaded at the next run of the **Cache Manager** service.
- ***Parent Reseller* has access to all information of its *Sub-Resellers***, and also can assign **any routing plan and rate table** to its *Sub-Resellers*.

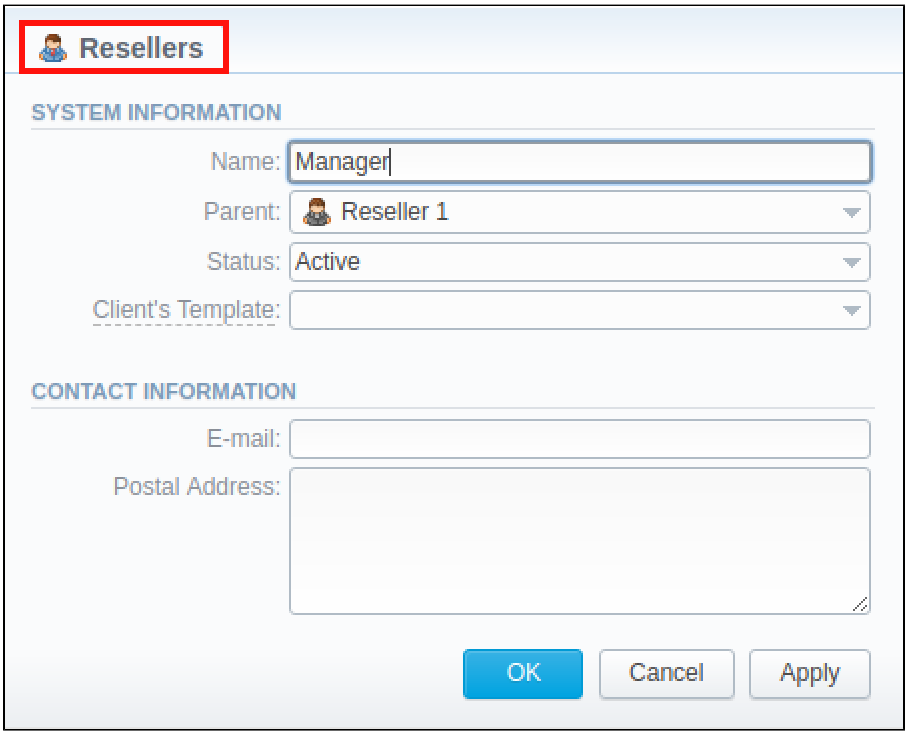
Attention

Email Rates Import Settings information block has been removed from the **Resellers** settings in **VCS 3.16.0** due to the introduction of the **Data Source** section.

Adding a New Manager

To add a manager, click the **New Manager** button. After specifying the required fields, click **OK**.

Screenshot: Adding a new manager

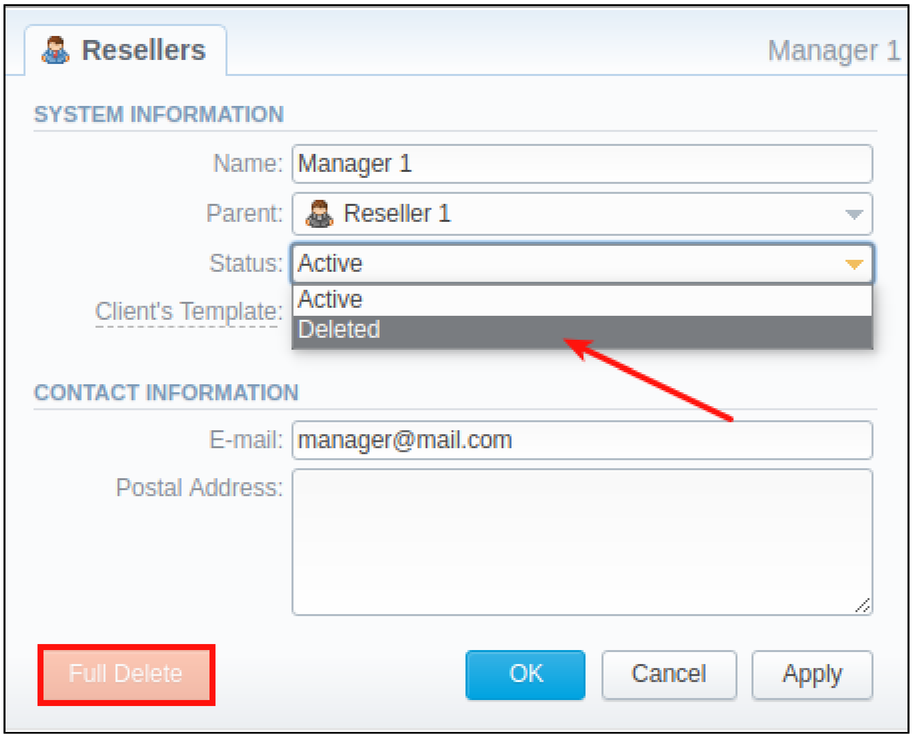


Information block	Fields Description	
System Information	General information about a Manager	
	• ***Name***	Here you can specify the name of a manager. This field is mandatory.
	• ***Parent***	Select a parent for a manager
	• **Status**	Select the current status of a manager: • ***Active*** • ***Deleted***
Contact Information	Some additional information	
	• ***Email***	Manager's email. Use only Latin characters.
	• ***Postal Address***	Manager's postal address

Reseller Removal

To delete a Reseller/Manager from the system, you need to **change the status** from ***Active*** to ***Deleted*** in the Reseller's/Manager's profile editing form.

Screenshot: Editing reseller's status



Please note, that, in fact, a Reseller/Manager **will not be deleted fully**, it will be **archived**. To display them, use **Advance Search** (see above). To delete a profile completely, you need to click **Full Delete** in this editing window.

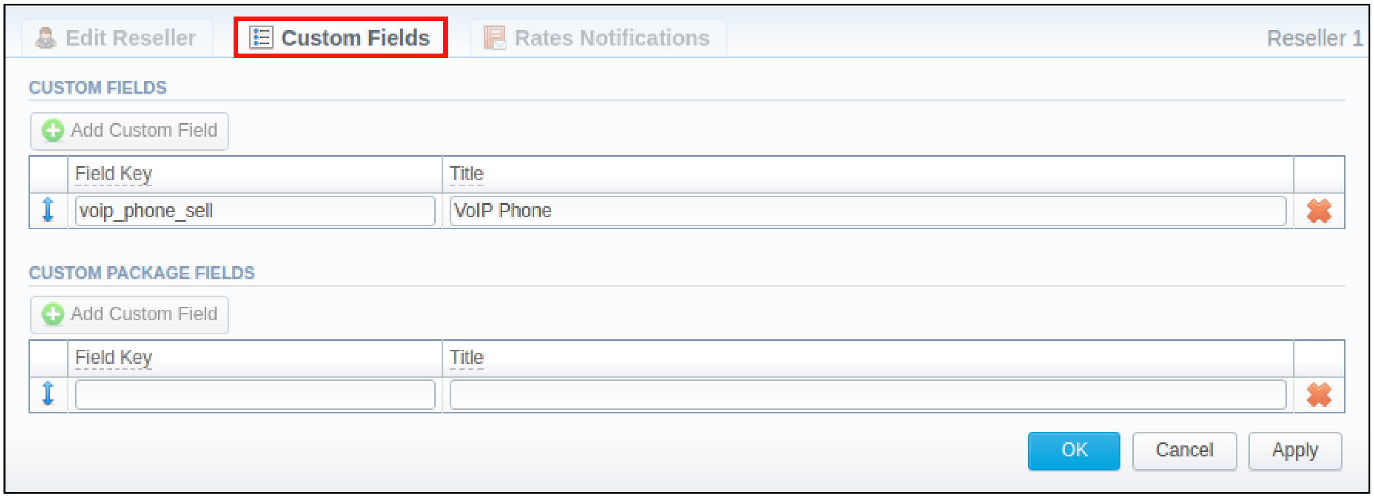
Custom Fields

- **Custom Fields** are used as custom variables that will be represented as readable text in invoice templates. A Custom Field allows adding information about a client.
- **Custom Package Fields** are also used as custom variables that allow adding information about a package.

To add a new field, follow these steps:

1. Click the **Add Custom Field** button.
2. Specify the ***Field Key*** and ***Title*** fields for a custom item. For example, ***voip_phone_sell*** as Key and ***VoIP Phone*** as common Title, which will be visible for all clients. Please note that the ***Field Key* must contain word characters only**.
3. Add respective notes to the ***VoIP Phone*** field in the ***Client's settings/Package settings*** > ***Custom Fields*** tab.
4. Create an invoice template and assign it to a target reseller. Then, the ***Clients Custom Fields*** and ***Package Custom Fields*** tables will appear in the **Invoice Template** settings. You simply need to add those tables to the invoice template.
5. Finally, you can generate an invoice.

Screenshot: Custom Fields



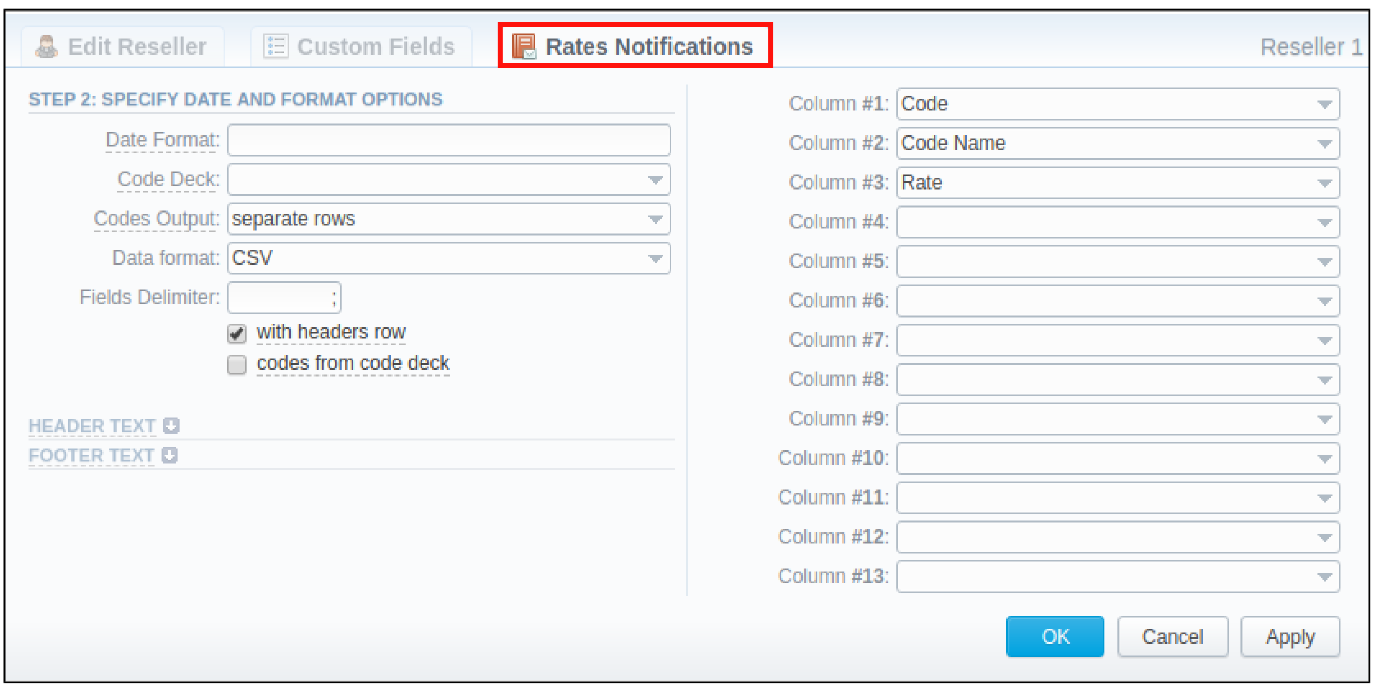
Rates Notifications

Rates Notification settings in the **Resellers** profile allow creating a **default rate notification** for the clients that belong to a target reseller.

Attention

- If any rate table (**child**) in the system has the assigned **parent** rate table, clients will be notified through the **Rate Notification** service about the changes in **both tables**.
- If the child and parent rate tables both have the rule for the same code, priority is given to a **child one**. However, if the rule in a child rate table has expired due to the ***End Date*** field value, and a parent rule is still active, notifications will regard the latter one.

Screenshot: Rates Notifications



To configure these settings, open the **Rate Notifications** tab in the reseller profile. The structure of a tab is as follows:

Field	Description
Date Format	Specify the date format in your export file. Example of the field syntax: if you enter ***"%d-%m-%Y"*** here, your date will look like ***25-02-2018***.
Code Deck	Select a code deck here to rewrite code names in an export file if needed

Codes Output	Select a way codes must be displayed	
	• ***Separate Rows***	Each code is placed into a single row
	• ***Delimited List***	Codes are grouped by a code name in a row. For example, ***5510, 5511, 5512***.
	• ***Ranges List***	Codes are grouped by a code name into ranges plus delimiter. For example, ***5510-5512, 5515***.
Data Format	Specify an output file format, **.xls** or **.csv**	
Fields Delimiter	Set a delimiter for the fields if you've chosen **.csv**. For **.xls** format, this field is unavailable	
With headers row checkbox	Include a row with column names in a file	
Codes from code deck checkbox	Include only codes, which are present in a specified ***Code Deck***	
Header Text/Footer Text	Allows to specify additional text into an exported file as a header and footer, respectively	

Description of all columns that could be selected for a rate notification is provided below:

> Note that the first selected column will be the one used for sorting the rates list.

Column Name	Description
Code / Code Name	Code or Code Name of a respective rate
Effective Date	Date, on which a rate to be applied
Rate	Price
Min Volume	The minimum volume of chargeable events
Interval	Chargeable interval
Grace Volume	Free of charge interval
Setup Fee	Interval of a setup fee
Profile	Time profile (*all time, business time, non-business time, weekends*)
End Date	Date, on which the rate ends
Previous Rate	Rate used before the present time
Prev Diff	Shows how current rate differs from a previous one after import
Prev Diff Status	Shows how the current rate's status changed in comparison to a previous one (unchanged, increased, decreased)
Prev Diff (export)	Shows how the current rate differs from a previous one after export
Prev Diff Status (export)	Rate's changes after the last export. Shows the status of how the current rate differs from a previous one. The rate will have an ***unchanged*** status if the ***Effective date*** is lower than the ***Last Notification Date***

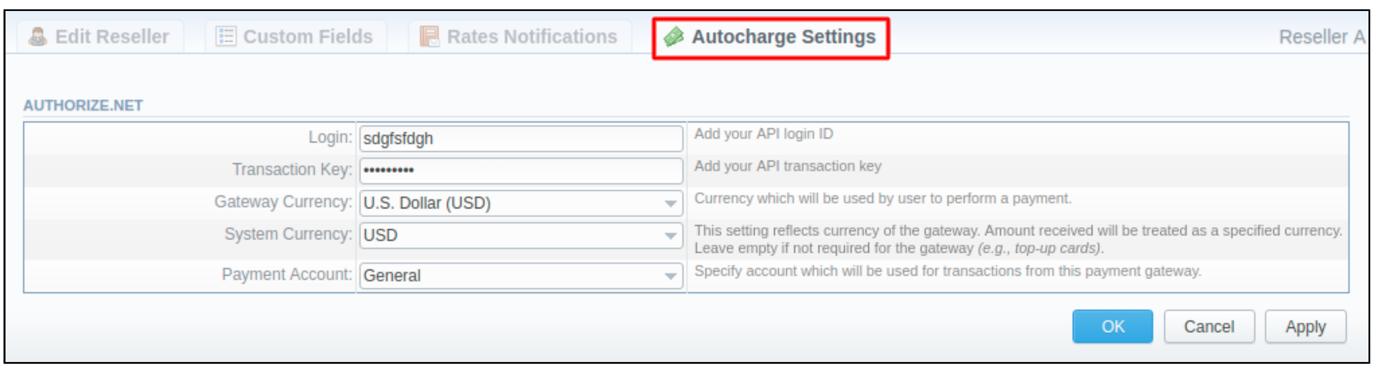
Step 1: Notification type: All rates unique mode - First Notification: 07/07/2017						
Code	Rate	Effective From	Previous Rate	Prev Diff	Prev Diff Status	Prev Diff Status (export)
1	10	07/01/2017 00:00:00 +0000	-	-	new	unchanged
2	10	07/01/2017 00:00:00 +0000	-	-	new	unchanged
3	10	07/01/2017 00:00:00 +0000	-	-	new	unchanged
Step 2: Added new rates with effective date 07/21/2017 - Second Notification: 07/14/2017						
Code	Rate	Effective From	Previous Rate	Prev Diff	Prev Diff Status	Prev Diff Status (export)
1	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
2	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
3	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
Step 3: Rate with code 1 was edited and the increase was canceled - Third Notification: 07/21/2017						
Code	Rate	Effective From	Previous Rate	Prev Diff	Prev Diff Status	Prev Diff Status (export)
1	**10**	07/21/2017 00:00:00 +0000	10	0	unchanged	**unchanged**
2	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
3	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
Step 4: Rate with code 2 was edited and added a new rate for code 3 - Fourth Notification: 07/28/2017						
Code	Rate	Effective From	Previous Rate	Prev Diff	Prev Diff Status	Prev Diff Status (export)
1	10	07/21/2017 00:00:00 +0000	10	0	unchanged	unchanged
2	**20**	07/21/2017 00:00:00 +0000	10	10	increased	**unchanged**
3	20	07/31/2017 00:00:00 +0000	15	5	increased	increased (5.0000)

Notes	Additional information
Tag	Tags that are assigned to a respective rate
Policy	Indicated policy of the rate
Status	Define a current rate status

Autocharge Settings

Autocharge Settings in the **Resellers** profile allow configuring the settings for Authorize.net payment gateway. These settings will be true for all the clients under the respected Reseller.

Screenshot: Autocharge Settings



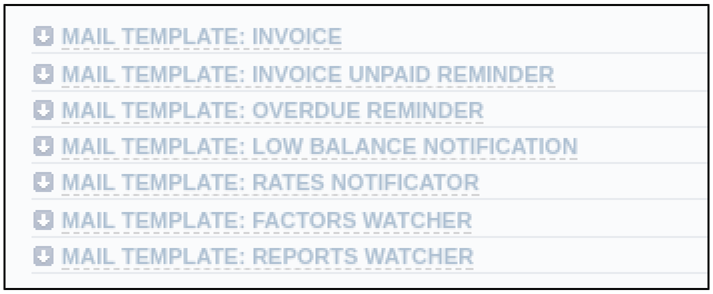
To configure these settings, open the **Autocharge Settings** tab in the reseller profile. The structure of a tab is as follows:

Field	Description
Login	API login
Transaction Key	API transaction key
Gateway Currency	A currency declared by the Payment Gateway
System Currency	Default JeraSoft Billing system currency
Payment Account	Payment Account name

Configuring Mail Templates

Also, there are different mail templates you can configure in your company's profile:

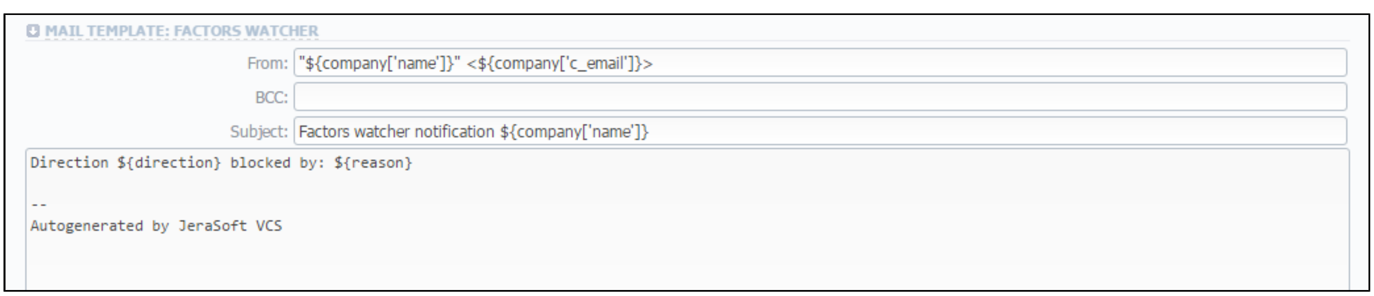
Screenshot: Mail Templates



Template Name	Description
Mail Template: Invoice	Used when sending an invoice to the customer
Mail Template: Invoice Unpaid Reminder	Used when sending a payment notification to a customer (sending notification on *"Notify Days (before)"*)
Mail Template: Overdue Reminder	Used when sending a payment notification to a customer (sending notification on *"Notify Days (after)"*)
Mail Template: Low Balance Notification	Used when sending a low balance notification to a customer **Tip** You can **add a rounding rule** for a client's balance during 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*** in reseller's settings and specify the number of rounding decimals in the ***Totals Precision*** field of the **Currencies** section.
Mail Template: Rates Notificator	Used when sending a rate changes notification to a customer
Mail Template: Factors Watcher	Used when sending a notification to a customer once a Preset by Factors Watcher has been added
Mail Template: Reports Watcher	Used when sending reports by email

All mail templates have the following structure:

Screenshot: Reseller/Mail Template: Factors Watcher form



<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td>From</td><td colspan="2">Specify a name and email of a company</td></tr>
<tr><td>BCC</td><td colspan="2">Specify who will receive a blind copy of an email</td></tr>
<tr><td>Subject</td><td colspan="2">Indicate an email subject that may contain company name, invoice number, etc.</td></tr>
<tr><td rowspan="3">Mail Body</td><td colspan="2">Content of the letter. On the screenshot above, the following information is specified:</td></tr>
<tr><td>• Direction {direction}</td><td>Code or Code name that will be automatically filled in by the system</td></tr>
<tr><td>• Reason {reason}</td><td>Values specified in Factors Watcher settings (for example, calls_total >0).</td></tr>
</table>

To configure any of these templates, simply click on its name. Below, you will find a full list of templates configuration syntax used in almost all kinds of configured mails concerning Clients' and Resellers' data and configuration syntax, which is used in a foregoing list of mail templates.

Configuration Syntax

General Configuration Syntax Concerning Clients' Data

Templates Configuration Syntax	Description
${client['status']}	Client's status: • ***Active*** • ***Deleted***
${client['name']}	Client's name
${client['balance']}	Client's live balance
${client['balance_accountant']}	Client's fixed balance
${client['credit']}	Client's available credit
${client['c_company']}	Client's official company name
${client['c_address']}	Post address of a client's company
${client['c_email']}	Client's email
${client['locale']}	Client's location
${client['currencies_id']}	Currency ID, used by a client
${client['tz']}	Timezone of a client
${client['taxes_profiles_id']}	Taxes profile's ID, used by a client
${client['tax_id']}	Customers tax ID of a client's company
${client['reg_id']}	Registration ID of a client's company

General Configuration Syntax Concerning Company's/Reseller's Data

Templates Configuration Syntax	Description
${company['status']}	Company's status: • ***Active*** • ***Deleted***
${company['balance']}	Company's current balance
${company['balance_accountant']}	Company's fixed balance
${company['credit']}	Company's available credit

${company['c_address']}	Company's postal address
${company['c_email']}	Email of a company
${company['locale']}	Company's location
${company['currencies_id']}	Company's currency ID
${company['tz']}	Company's timezone
${company['taxes_profiles_id']}	Company's taxes profiles
${company['name']}	Name of a company
${company['tax_id']}	Company's customers tax ID
${company['reg_id']}	Company's registration ID

Configuration Syntax for Mail Template: Invoice and Payment Reminder Notification

Templates Configuration Syntax	Description
${invoice['c_dt']}	Invoice date
${invoice['type']}	Invoice type
${invoice['amount']}	Invoice total sum
${invoice['period_start']}	Invoice period start
${invoice['period_finish']}	Invoice period end
${invoice['due_date']}	Invoice due date
${invoice['no']}	Invoice number
${invoice['descr']}	Invoice comments
${invoice['tz']}	Invoice timezone
${invoice['state']}	Invoice state
${invoice['name']}	Invoiced client's name
${client['currency']}	Client's currency

Configuration Syntax for Mail Template: Low Balance Notification

Templates Configuration Syntax	Description
${client['balance_avail']}	Client's available balance: live balance + credit
${client['currency']}	Client's currency
${client['alert_threshold']}	Notification for a client regarding reaching a balance limit
${client['alert_athreshold']}	Notification for an administrator regarding reaching a balance limit

Configuration Syntax for Mail Template: Rates Notificator

Templates Configuration Syntax	Description
${msg['rt_name']}	Rate table name
${msg['lastedit_dt']}	Date when a rate table was edited last
${date}	Date when the notification was sent

Configuration Syntax for Mail Template: Reports Watcher

Templates Configuration Syntax	Description
${report["title"]}	Title of a report template
${report["interval"]}	Actual report period

${report["title-full"]}	Title of a report template with indication of an actual report period
${report["webUrl"]}	URL to view a report on the web portal
${report["id"]}	ID of a report template

Tip

If you want the date of sending a letter to be present, you can add the **${date}** variable in any mail template.

Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty