

Accounts

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Section overview

This section is designed to create and manage all clients' accounts in the system. Any clients can have an unlimited number of unique accounts. Accounts are a key tool for clients' identification in JeraSoft Billing. The section is presented in the form of a table with the following columns:

Screenshot: Accounts section

The screenshot shows a table titled "Accounts" with the following data:

ID	Client	Account	Name / ANI / IP	Tech Prefix	Orig Details	Term Details
176	Rose orig	rose_orig	Name: rose_orig		<input checked="" type="checkbox"/> RT: RT ORIG - Rose <input checked="" type="checkbox"/> RP: DR: Complex LCR	<input checked="" type="checkbox"/> RT: OC: — TC: — <input checked="" type="checkbox"/> Protocol: — / Proxy: 1 / Port: —
177	Rose term	rose_term	Name: rose_term		<input checked="" type="checkbox"/> RT: OC: —	<input checked="" type="checkbox"/> RT: TC: — <input checked="" type="checkbox"/> Protocol: — / Proxy: 1 / Port: —

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Column Name	Description
ID	Account's identification number
Client	Client's name
Account	Account's name
Name/ANI/IP	The way of clients' identification
Tech Prefix	Technical prefix for users' identification
Orig Details	Originator settings
Term Details	Terminator settings

⚠ Attention

- It's possible to add multiple accounts with the same IP address and different protocols/ports.
- When you **delete an account** from the system, all **associated statistics will be removed, amounts will be refunded and the client's balance will increase**. We recommend deactivating useless accounts instead of completely deleting them from the system. You can deactivate an account by disabling **Originator/Terminator Settings** checkboxes.

The section contains the respective list of functional buttons and icons.

Button/Icon	Description
	Allows creating a new client's account
	Allows filtering accounts by a specified client
	Allows viewing specified client's profile in the Clients section
	Allows viewing client's change history in the Audit log section

	Indicates that the Orig/Term rate table or routing plan is assigned to an account
	Allows deleting an account from the system

Advanced Search

Use the **Advanced Search** drop-down menu for fast navigation in the section (for instance, displaying accounts belonging to a certain client) by clicking on a red downward arrow icon.

You can start a quick search by typing your keywords in a target field and clicking the **Search** button.

Screenshot: Advanced Search drop-down menu

The screenshot shows a vertical list of search criteria fields. At the top is a small blue circular icon with an upward-pointing arrow. Below it are two text input fields: 'Name / ANI / IP:' and 'Tech Prefix:'. Underneath these are two checkboxes: 'Origination:' and 'Termination:'. Following these are dropdown menus for 'Orig Rate Table:', 'Routing Plan:', and 'Tags'. Another set of checkboxes and dropdown menus follows: 'Term Rate Table:' and 'Tags'. At the bottom are two more dropdown menus: 'Client Type:' (set to 'Clients') and 'Client:'. At the very bottom are two buttons: 'Reset' and a larger blue 'Search' button.

Adding New Account

To add a new account, click the **New Account** button and fill in the respective fields. Then click the **OK** button. The list of fields is as follows:

Screenshot: Adding new account

The screenshot shows the 'Accounts' dialog box with the 'Accounts' tab selected. The 'GENERAL' tab is active, displaying fields for 'Client' (set to 'Rose orig'), 'Name' (set to 'New account'), 'IP' (set to '11.11.20.33'), 'Tech Prefix', 'Password', 'Gateway' (set to 'GW Calls'), and 'Notes'. To the right of the general fields are three tabs: 'ORIGINATOR SETTINGS' (selected), 'TERMINATOR SETTINGS', and another partially visible tab. The 'ORIGINATOR SETTINGS' tab contains dropdowns for 'Rate Table' (set to 'RT ORIG - Rose') and 'Routing Plan' (set to 'DR: Complex LCR'), along with fields for 'Tags' and 'Capacity'. The 'TERMINATOR SETTINGS' tab contains dropdowns for 'Rate Table', 'Tags', 'Capacity', 'Protocol', 'Proxy', and 'Port'. At the bottom right are three buttons: 'OK', 'Cancel', and 'Apply'.

Information block	Fields and Description	
General	General information about a new client's account	
General	• Client	Specify a client, to whom this account belongs
	• Name	Define the name of an account for JeraSoft Billing
	• Identify	The <i>JeraSoft Billing system</i> allows client identification in 3 different ways, you need to select one of below-mentioned: <ul style="list-style-type: none"> • IP – gateway IP-address. You can specify multiple addresses, by dividing them with “;”. Moreover, you can specify the subnet with mask here in CIDR-format, e.g., 10.0.0.0/24, 200.200.200.208/28 • Name – gateway name or user login, used for identification • ANI (Automatic Number Identification) – callee's or caller's phone number
	• Tech Prefix	Define technical prefix that is used to identify users when multiple clients use the same gateway
	• Password	Set a user's password that is used with login/password identification on a switch. In addition, it can be used through the default authentication mechanism. For more info, please consult your switch system manuals. Note that you can automatically generate a password or show it by clicking on the  icon or the  icon respectively.
	• Gateway	Specify a gateway for the account, which will be in use only when billing this host calls. It is possible to assign more than one gateway to one account.
	• Notes	Additional information about a current account
	Settings for your customers, who send calls to your switch	
Originator Settings	• Rate Table	Select a rate table for a current origination account (it will have a higher priority than a rate table set for the whole client)
	• Routing Plan	Indicate a routing plan for a current origination account
	• Tag	Specify a tag for a current origination account
	• Capacity	Set limitation for the number of simultaneous calls within this account
	Settings for your vendors, whom you send calls from your switch to	
Terminator Settings	• Rate Table	Select a rate table for a current termination account (it will have a higher priority than a rate table set for the whole client)
	• Tag	Specify a tag for a current termination account

• <i>Capacity</i>	Indicate capacity for respective traffic direction
• <i>Protocol</i>	Select respective protocol for a current termination gateway
• <i>Proxy</i>	Define proxy for a current termination gateway
• <i>Port</i>	Set port for a current termination gateway

 **Attention**

- You can add an **unlimited** number of accounts for **each client**
- It's possible to add multiple accounts with the **same IP** address and **different protocols/ports or different gateways**

Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty