Routing Plans

In this article

- Section overview
- Advanced Search
- Adding a New Routing Plan
- Routing Rules tab
- Import/Export tab
- Routing Plan
- Knowledge Base Articles

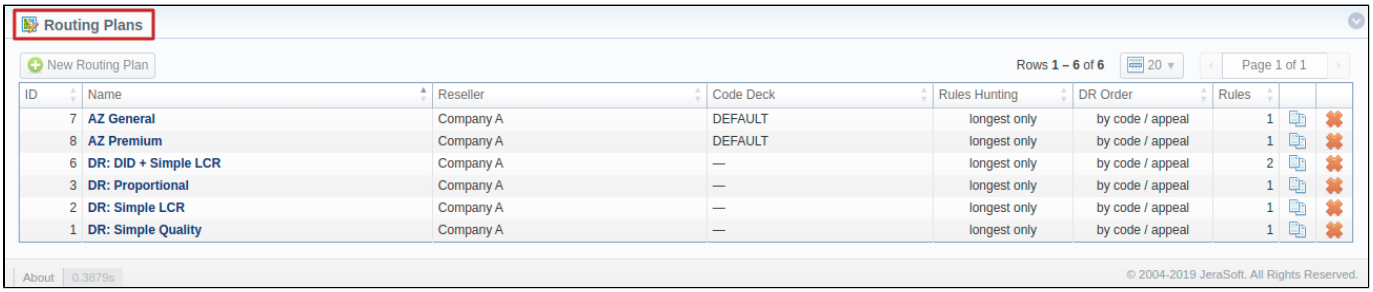
Section overview

The **Routing Plans** section is available if your JeraSoft Billing includes the **Routing Module**. To access the *Routing Plans* section, please log in to your system and go to **Routing > Routing Plans**.

This section allows managing your routing rules for customers, providers, and destinations. Each routing plan should be assigned to a respective customer (originator) for the proper work of the routing process.

You can combine both routing rules (**dynamic** and **static**) while creating a routing plan and also assign separate rules to each destination. Here you can find a list of created routing plans.

Screenshot: Routing Plans section



Column	Description
ID	ID number of a routing plan
Name	Name of a routing plan
Reseller	Name of a reseller a corresponding routing plan has been assigned to as an owner
Code Deck	Name of code deck that has been applied to a corresponding routing plan
Rules Hunting	A respective hunting rule that has been applied to a routing plan
DR Order	A name of dynamic routing order that has been selected to organize routing rules
Rules	A number of rules specified in a respective routing plan

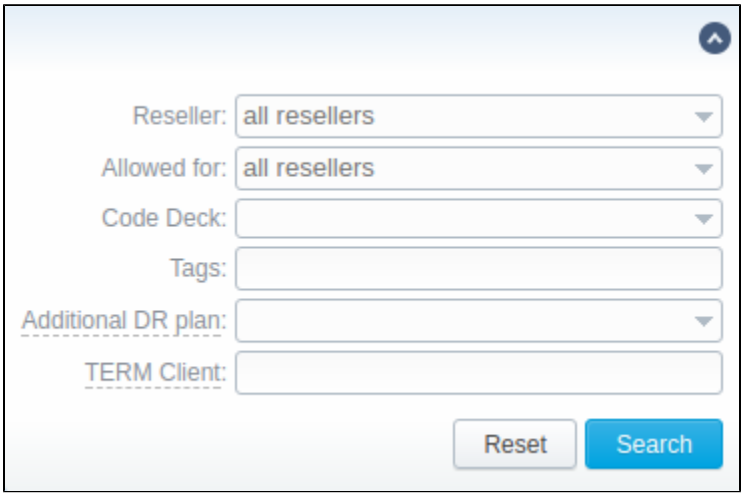
Functional **buttons/icons** presented in the section are as follows:

Button/Icon	Description
New Routing Plan	Allows to create a new routing plan
	Allows to copy an existing routing plan to the section
	Allows deleting a routing plan from the system

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



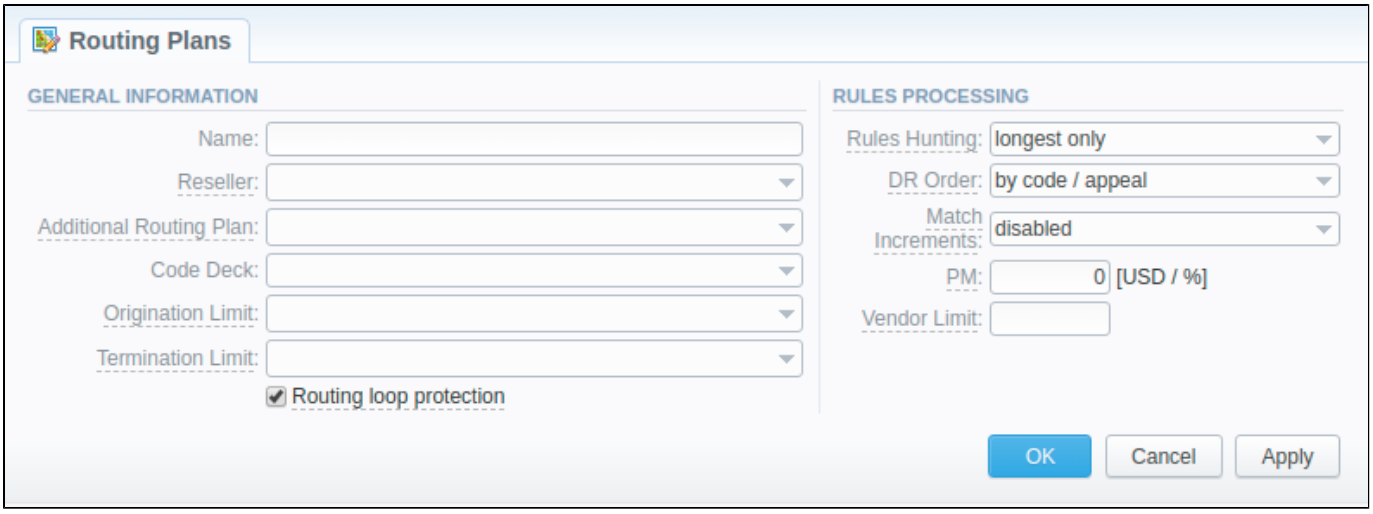
Field	Description
Reseller	Select from the list of all Resellers, Sub-resellers and Managers registered in the system
Allowed for	Select from the list of all Resellers, Sub-resellers, and Managers that are assigned to a routing plan in the ***Origination Limit*** field
Code Deck	Select from the list of all Code Decks in the system
Tags	Specify a certain Tag that was added to a routing plan
Additional DR Plan	Select a routing plan that was assigned as an additional in the ***Additional Routing Plan*** field
TERM Client	Specify a termination client that was assigned to any routing plan rule

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

Adding a New Routing Plan

To create a new routing plan, click the **New Routing Plan** button, and fill in the following fields in the pop-up window.

Screenshot: Routing Plans window



Information Block	Fields Description
General Information	General routing plan information

	Name	Title of a routing plan
	Reseller	Define the reseller/owner of a current routing plan
	Additional Routing Plan	Specify a DR plan, which will be additional for a current plan
	Code Deck	Select a Code Deck if you wish to have names of your code to be specified in the ***Code Name*** field
	Origination Limits	Define the company or companies, which will have access to this routing plan (also this restriction will be extended to their sub-companies). If there is no specified company, the following routing plan is available for all companies.
	Termination Limits	Select the company or companies, which will have a limit in termination for vendors who use it (sub-companies are not included)
	Rooting Loop Protection checkbox	Excludes originating client from the list of terminators. If it is unchecked, it will be possible to route calls between different accounts of the same client. It is **enabled** by default.
Rules Processing	Options of rules processing	
	Rules Hunting	Select a hunting mode (the way how rules will be executed). They are as follows: • ***longest only*** – routing will find only the longest matching code • ***all matching*** – all possible matches will be found, including even the shortest codes By default, the **longest only** option is set.
	DR Order	Specify a method of routes sorting in a routing table. The options are: • ***by appeal/code*** – routes will be sorted according to their resulting appeal value and then grouped by codes • ***by code/appeal*** – routes will be grouped by codes and then sorted by appeal value By default, the **by code/appeal** option is set.
	Match Increments	Define if the system should check whether Customers' increments proportionally overlap Vendors' increments: • ***disabled*** - selected by default • ***dynamic only*** - will exclude vendors with increments that do not match customers' rates from the routing list for dynamic rules. • ***dynamic and static*** - will exclude vendors with increments that do not match customers' rates from the routing list for dynamic and static rules. **Sample Scenarios** (see table below)
	PM	Define a Profit Margin value for a current rule here. It can be specified either as a percent value (e.g., ***16%***), or in a system currency (e.g., ***5*** for ***5 USD***).
	Vendor Limit	Determine the number of allowed routes for the same vendor to use (if a vendor has multiple accounts). You can set the **limit only for accepted account routes**, not including the accounts blocked by the term groups. If the field is left empty, the number is unlimited.

Customer Rate		Vendor Rate		Result	Notes
Min Time	**Pay Internal**	**Min Time**	**Pay Interval**		
60	60	60	60	OK	Exact match
30	6	30	1	OK	Full overlap
30	6	6	6	OK	Full overlap
1	1	30	6	FAIL	Vendor Increments are higher
7	7	6	6	FAIL	Even though Customers increments are higher, with call duration of 7 seconds this case will lead to 7 seconds billed on customer and 12 seconds billed on vendor

Attention

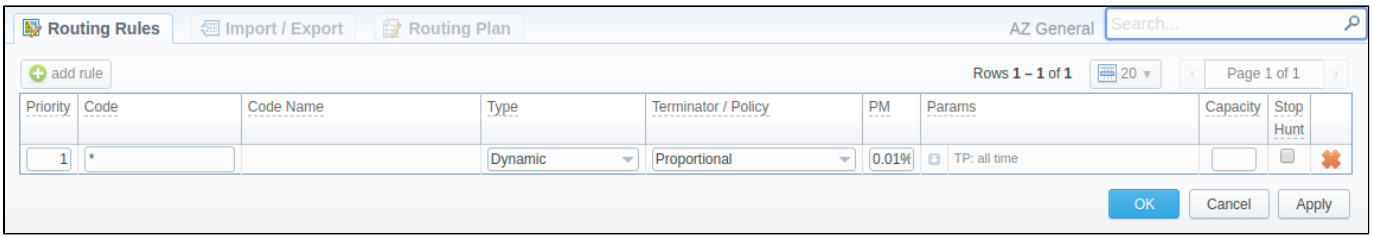
Please note that the ***Origination Limit*** and ***Termination Limit*** fields are visible only during:

- new routing plan creation;
- editing of already created routing plan if a specified *Reseller* of this routing plan has **at least one sub-reseller or manager**.

Routing Rules tab

Once a routing plan has been created, routing rules are to be determined (see screenshot below). To do that, click on a routing plan's name and you will enter **Routing Rules** tab, then click the **Add rule** button and fill in the following fields:

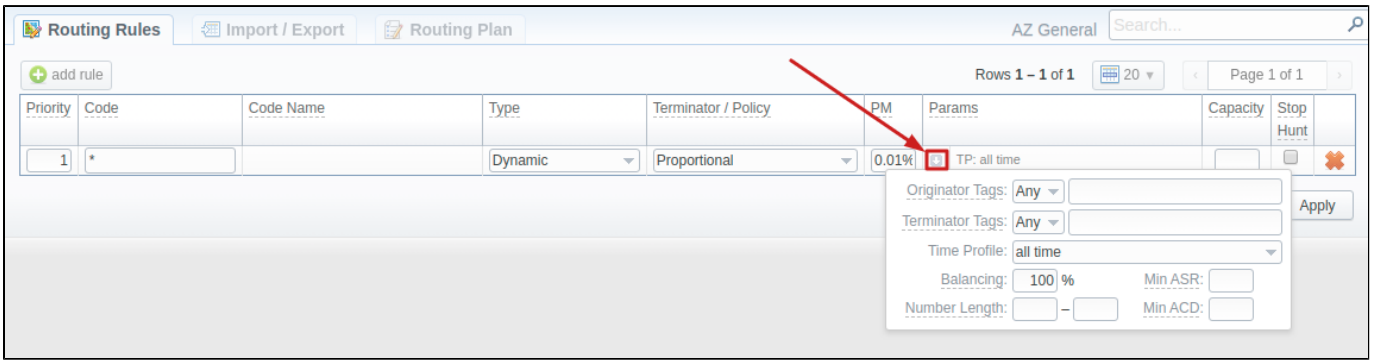
Screenshot: Routing Rules tab



Field	Description
Priority	Define a priority of rule execution if two or more rules have similar code or code name specified
Code	Enter a code, which will be used in a current routing rule, use * as a wildcard.
Code Name	If you have a code deck assigned to this routing plan, a corresponding code name, specified in the ***Code*** field, will be displayed automatically. If no code deck is attached, the field will remain empty.
Type	Select a type of routing for a current rule: • ***Static Client*** - if selected, in the ***Terminator/Policy*** field you can specify a certain termination client • ***Static Account*** - if selected, in the ***Terminator/Policy*** field you can specify a certain termination account of a client • ***Dynamic*** - if selected, in the ***Terminator/Policy*** field you can specify a certain dynamic policy for the rule • ***DID*** - if selected, the ***Terminator/Policy*** and ***Code*** fields become inactive
Terminator /Policy	If you selected static type, you may specify a termination client/account here; if you selected dynamic type, specify routing policy for the current rule
PM	Define a *Profit Margin* value for a current rule here. **Attention** If the ***PM*** field has been specified both for the entire routing plan and for a certain rule, **the latter has a higher priority.**
Params	A number of additional parameters available by clicking the icon (see screenshot below)
• ***Originator Tags***	You can specify respective originator tags here. If nothing is specified, it works for all. • ***all*** - applies for originators if all specified tags are present. • ***any*** - applies for originators if at least one of the specified tags is presented.
• ***Terminator Tags***	Here you can add terminator tags that will be used for terminators. If nothing is indicated, it works only for terminators **without** tags. Please note, this parameter is available only for dynamic rules
• ***Time Profile***	Specify a time profile from the list

	• ***Balancing***	Define the percentage or proportion amount of traffic, which will be sent to a respective vendor who participates in balancing **Attention** Please note that after changing *balancing value***,** it is needed to restart SIP and/or RADIUS daemons. Among the rules of the same priority, balancing will not be performed if the value is 100 or more in the ***Balancing*** field.
	• ***Number Length***	Set **minimum** and **maximum** length of destination number that will be matched by this routing rule
	• ***Min ASR***	Specify **minimum** ASR value to reject the routes that don't correspond to it
	• ***Min ACD***	Specify **minimum** ACD value to reject the routes that don't correspond to it
Capacity	Limit capacity for the current rule (leave blank for unlimited)	
Stop Hunt *checkbox*	If this field is checked, it means that rule search will be stopped when matched with the current one and all the consecutive rules will not be executed for a current call. The logic will be respected even if the rule marked with "Stop Hunt" will be rejected due to some reason during routing. If ***Stop Hunt*** is enabled, but the rule was rejected due to "*Orig Tags*" mismatch or "*Reseller Mismatch*" reasons, the option will be ignored to continue looking for routes, which are filtered based on originator.	

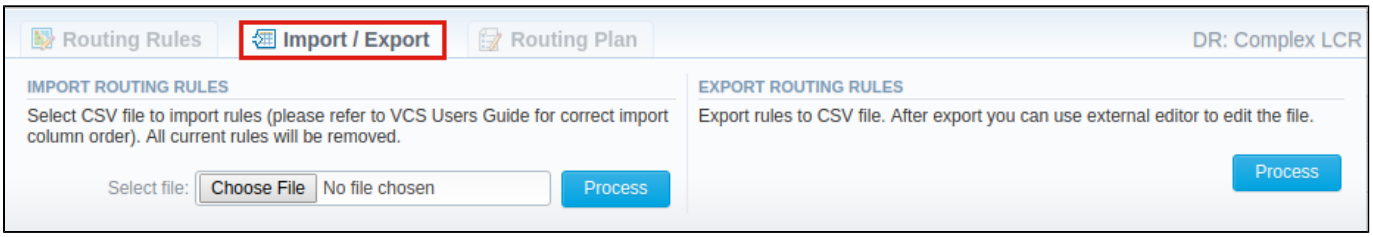
Screenshot: Routing rules settings



Import/Export tab

The Import/Export tab allows a user to either upload desired routing rules (choose a file on a computer through a form and click **Process**) or download current routing plan rules in a .csv file by clicking the **Process** button (see screenshot).

Screenshot: Import/Export tab



Please pay attention that the column order in importing file must correspond to the one presented in the screenshot below.

Screenshot: Importing file format

Code	Code name	Priority	Type	Client	Account	Policy	PM	Time Profile	Number length min	Number length max	Balancing	Originator Tags	Terminator Tags	Capacity	Stop Hunt
1268*		1	Static	Vendor Figaro				all time			100				
7		1	Dynamic			Simple LCR		all time			100				
1758*		1	Static	Vendor Lotos				all time			100				
1		1	Static	Vendor Figaro			5%	all time		15	70				
1		1	Static	Vendor Lotos				all time			30				
1		2	Dynamic			Simple Quality		all time			100	origination group 1	Termination group		
*		2	Dynamic			Simple LCR		all time			100				
2		1	Static	Vendor Figaro				all time			50	origination group 2			
3		1	Static	Vendor Profit				all time			100				
4		1	Static	Vega_DID_provider				all time			100				

Attention

After all information has been entered and rules created, you need to go to ***Management > Clients/Accounts*** sections and assign this routing plan to one or more of your origination clients or client's accounts.

Routing Plan

If you wish to change your routing plan settings, you can always do so by going to the Routing Plan tab. The list of fields in a tab is identical to that on a routing plan creation page (see screenshot below).

Screenshot: Routing Plan tab

Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty