

Routing Plans

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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.

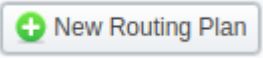


You can combine both routing rules (**dynamic** and **static**) while creating a routing plan, also assign separate rules to each destination. Here you can find a list of created routing plans.

Screenshot: *Routing Plans* section


Routing Plans							
New Routing Plan							
Rows 1 – 6 of 6 20 Page 1 of 1							
ID	Name	Reseller	Code Deck	Rules Hunting	DR Order	Rules	
7	AZ General	Company A	DEFAULT	longest only	by code / appeal	1	
8	AZ Premium	Company A	DEFAULT	longest only	by code / appeal	1	
6	DR: DID + Simple LCR	Company A	—	longest only	by code / appeal	2	
3	DR: Proportional	Company A	—	longest only	by code / appeal	1	
2	DR: Simple LCR	Company A	—	longest only	by code / appeal	1	
1	DR: Simple Quality	Company A	—	longest only	by code / appeal	1	

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
	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

Reseller:

all resellers

Allowed for:

all resellers

Code Deck:

Tags:

Additional DR plan:

TERM Client:

Reset

Search

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

Routing Plans

GENERAL INFORMATION

Name:

Reseller:

Additional Routing Plan:

Code Deck:

Origination Limit:

Termination Limit:

☒ Routing loop protection

RULES PROCESSING

Rules Hunting:

longest only

DR Order:

by code / appeal

Match Increments:

disabled

PM:

0

 [USD / %]


Vendor Limit:

OK

Cancel

Apply

Information Block	Fields Description
General Information	General routing plan information

	<table><tr><td>Name</td><td>Title of a routing plan</td></tr><tr><td>Reseller</td><td>Define the reseller/owner of a current routing plan</td></tr><tr><td>Additional Routing Plan</td><td>Specify a DR plan, which will be additional for a current plan</td></tr><tr><td>Code Deck</td><td>Select a Code Deck if you wish to have names of your code to be specified in the Code Name field</td></tr><tr><td>Origination Limits</td><td>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.</td></tr><tr><td>Termination Limits</td><td>Select the company or companies, which will have a limit in termination for vendors who use it (sub-companies are not included)</td></tr><tr><td>Rooting Loop Protection checkbox</td><td>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.</td></tr></table>	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.																									
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Rules Processing	Options of rules processing																																							
	<div>Rules Hunting</div> <div>Select a hunting mode (the way how rules will be executed). They are as follows:<ul style="list-style-type: none">• longest only – routing will find only the longest matching code• all matching – all possible matches will be found, including even the shortest codesBy default, the longest only option is set.</div>																																							
	<div>DR Order</div> <div>Specify a method of routes sorting in a routing table. The options are:<ul style="list-style-type: none">• 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 valueBy default, the by code/appeal option is set.</div>																																							
	<div>Match Increments</div> <div>Define if the system should check whether Customers' increments proportionally overlap Vendors' increments:<ul style="list-style-type: none">• 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.<div><div></div><div>Sample Scenarios</div><table><thead><tr><th colspan="2">Customer Rate</th><th colspan="2">Vendor Rate</th><th rowspan="2">Result</th><th rowspan="2">Notes</th></tr><tr><th>Min Time</th><th>Pay Internal</th><th>Min Time</th><th>Pay Interval</th></tr></thead><tbody><tr><td>60</td><td>60</td><td>60</td><td>60</td><td>OK</td><td>Exact match</td></tr><tr><td>30</td><td>6</td><td>30</td><td>1</td><td>OK</td><td>Full overlap</td></tr><tr><td>30</td><td>6</td><td>6</td><td>6</td><td>OK</td><td>Full overlap</td></tr><tr><td>1</td><td>1</td><td>30</td><td>6</td><td>FAIL</td><td>Vendor Increments are higher</td></tr><tr><td>7</td><td>7</td><td>6</td><td>6</td><td>FAIL</td><td>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</td></tr></tbody></table></div></div>	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
Customer Rate		Vendor Rate		Result	Notes																																			
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30	6	30	1	OK	Full overlap																																			
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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																																			
	<div>PM</div> <div>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).</div>																																							
	<div>Vendor Limit</div> <div>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.</div>																																							

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*

Routing Rules

Import / Export

Routing Plan

AZ General

Search...

+ add rule

Rows 1 - 1 of 1

20


Page 1 of 1

Priority	Code	Code Name	Type	Terminator / Policy	PM	Params	Capacity	Stop Hunt
1	*		Dynamic	Proportional	0.01%	TP: all time		

OK

Cancel

Apply

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 i
Type	<div>Select a type of routing for a current rule:<ul style="list-style-type: none">• 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</div>
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 r
PM	<div>Define a <i>Profit Margin</i> value for a current rule here.<div><div>Attention</div><div>If the PM field has been specified both for the entire routing plan and for a certain rule, the latter has a higher priority.</div></div></div>
Params	<div>A number of additional parameters available by clicking the  icon (see screenshot below)</div> <div><div><div>O r i g i n a t o r T a g s</div><div><div>You can specify respective originator tags here. If nothing is specified, it works for all.<ul style="list-style-type: none">• all - applies for originators if all specified tags are present.• any - applies for originators if at least one of the specified tags is presented.</div></div></div></div>

• 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

• 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*, you will need to restart the **Traffic Rules manager** or wait till its next run.

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Among the rules of the same priority, balancing will not be performed if the value is 100 or more in the **Balancing** field.

✓

Useful tip

To balance routes equally among, say, three vendors, you can set **Balancing** to 33/33/33 for them OR 1/1/1 OR 99/99/99, etc.

Priority	Code	Code Name	Type
1	1907	ALASKA	Static Client
1	1907	ALASKA	Static Client
1	1907	ALASKA	Static Client
1	212	MOROCCO	Static Client
1	212	MOROCCO	Static Client
1	212	MOROCCO	Static Client

• Number Length

Set **minimum** and **maximum** length of destination number that will be matched by this routing rule

	• M i n A S R	Specify minimum ASR (successful records percentage) value to reject the routes that don't correspond to it
	• M i n A C D	Specify minimum ACD (in Service units) 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, this means that rule search will be stopped when matched with the current one and all the consecutive rules will not be ex	

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				

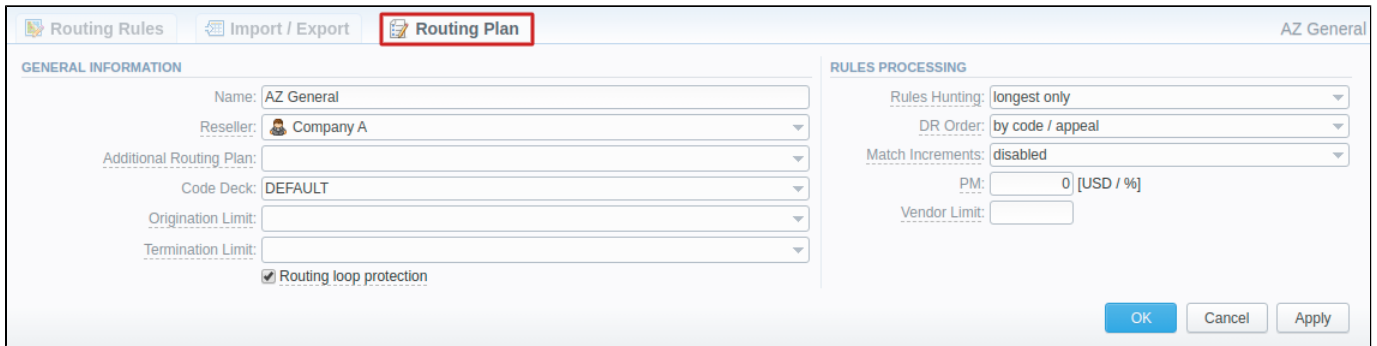
Attention

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*



The screenshot displays the 'Routing Plan' tab in a software application. The tab is highlighted with a red border. The interface is divided into two main sections: 'GENERAL INFORMATION' and 'RULES PROCESSING'. The 'GENERAL INFORMATION' section contains fields for 'Name' (AZ General), 'Reseller' (Company A), 'Additional Routing Plan', 'Code Deck' (DEFAULT), 'Origination Limit', 'Termination Limit', and a checked box for 'Routing loop protection'. The 'RULES PROCESSING' section includes dropdown menus for 'Rules Hunting' (longest only), 'DR Order' (by code / appeal), and 'Match Increments' (disabled), as well as input fields for 'PM' (0) and 'Vendor Limit'. At the bottom right, there are buttons for 'OK', 'Cancel', and 'Apply'.

Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty