

# Resellers

## In this article

- [Section overview](#)
- [Advanced Search](#)
- [Adding a New Reseller](#)
- [Adding a New Manager](#)
- [Reseller Removal](#)
- [Custom Fields](#)
- [Rates Notifications](#)
- [Autocharge Settings](#)
- [Configuration Syntax](#)
- [Knowledge Base Articles](#)

## Section overview

**Reseller** in JeraSoft Billing, in the majority of cases, is a company who 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 can 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

| Resellers                     |               |               |  |                 |                                            |  |         |  |       |            |
|-------------------------------|---------------|---------------|--|-----------------|--------------------------------------------|--|---------|--|-------|------------|
| + New Company                 |               | + New Manager |  | Rows 1 – 4 of 4 |                                            |  |         |  |       |            |
| ID                            | Name          |               |  |                 | Available Balance                          |  | Clients |  | Cards | Call Shops |
| 3                             | Reseller 1    |               |  |                 | No Limit USD                               |  | 3       |  | 114   | 0          |
| 20                            | Manager 1     |               |  |                 |                                            |  | 0       |  | 0     | 0          |
| 21                            | Sub-manager 1 |               |  |                 |                                            |  | 0       |  | 0     | 1          |
| 15                            | Reseller 2    |               |  |                 | 0.00 USD                                   |  | 1       |  | 0     | 0          |
| About   Get Support   0.1830s |               |               |  |                 | © 2004-2018 JeraSoft. All Rights Reserved. |  |         |  |       |            |

| 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:

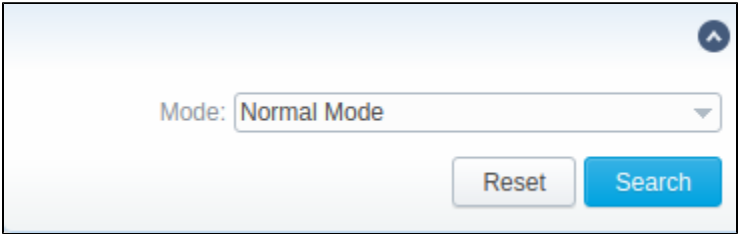
| Button/Icon   | Description                                                         |
|---------------|---------------------------------------------------------------------|
| + New Company | Allows creating a new reseller                                      |
| + New Manager | Allows creating a new 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 <a href="#">Audit log section</a>                      |
|  | Allows viewing reseller's balance operations in the <a href="#">Transactions section</a>                                          |
|  | Allows viewing a list of reseller's/manager's clients in the <a href="#">Clients section</a>                                      |
|  | Allows viewing a list of reseller's/manager's calling cards in the <a href="#">Calling Cards section</a>                          |
|  | Allows viewing a list of reseller's/manager's call shops for a current reseller/manager in the <a href="#">Call Shops section</a> |

## 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: <ul style="list-style-type: none"><li>• <b>Normal Mode</b> - only resellers with Active status will be displayed</li><li>• <b>Archive Mode</b> - all resellers regardless of the status will be displayed</li></ul> |

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

Resellers

SYSTEM INFORMATION

Name:

Parent:

...root...

Currency:

USD

Status:

Active

Client's Template:

Tax Profile:

Gateways:

TERMINATOR SETTINGS

TERM Rates:

TERM Capacity:

FRAUD PROTECTION

Notification Frequency:

0

Skip Digits:

0

ORIGINATOR SETTINGS

Credit limit:

0 USD

Unlimited

ORIG Rates:

ORIG Capacity:

INVOICING INFORMATION

Date:

Real Date

Template:

default | PDF

No Tpl:

Last No:

10000

CONTACT INFORMATION

Email:

Postal Address:

Tax ID:

Reg ID:

Bank Account:

COMPANY LOGO

Choose File

No file chosen

MAIL TEMPLATE: INVOICE

MAIL TEMPLATE: INVOICE UNPAID REMINDER

MAIL TEMPLATE: OVERDUE REMINDER

MAIL TEMPLATE: LOW BALANCE NOTIFICATION

MAIL TEMPLATE: RATES NOTIFICATOR

MAIL TEMPLATE: FACTORS WATCHER

MAIL TEMPLATE: REPORTS WATCHER

OKCancelApply

| Information block  | Fields Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| System Information | General information about a company                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|                    | <ul style="list-style-type: none"> <li>• <b>Name</b></li> </ul> <p>Specify the name of one of your companies (or affiliates). This field is mandatory.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|                    | <ul style="list-style-type: none"> <li>• <b>Parent</b></li> </ul> <p>Indicate a parent for a reseller or make it a root one. By default, the field value is set to <b>root</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|                    | <ul style="list-style-type: none"> <li>• <b>Currency</b></li> </ul> <p>Select a preferred currency for rates and invoices from the drop-down list of all available ones (see the <a href="#">Currencies section</a>)</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|                    | <ul style="list-style-type: none"> <li>• <b>Status</b></li> </ul> <p>Define the status of a reseller:</p> <ul style="list-style-type: none"> <li>• <b>Active</b></li> <li>• <b>Deleted</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                    | <ul style="list-style-type: none"> <li>• <b>Client Template</b></li> </ul> <p>Select a template that will be used for all clients belonging to this reseller or manager by default (see the <a href="#">Clients Template section</a>)</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|                    | <ul style="list-style-type: none"> <li>• <b>Tax Profile</b></li> </ul> <p>Indicate a tax profile that will be used for this reseller and reflected in invoices (refers to the <a href="#">Taxes Profiles section</a>).</p> <ul style="list-style-type: none"> <li>• <b>SureTax</b> 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 <a href="#">US Taxation</a> article.</li> </ul> <div style="background-color: #ffffcc; padding: 10px; margin-top: 10px;"> <p> <b>Attention</b></p> <p>For proper usage of SureTax, <b>Invoice Number</b> should contain only Latin and numeric characters. Max length is 40 symbols. <b>Dst</b> and <b>Src Numbers</b> should be in the <b>NPANXXNNNN</b> (10 digits) format.</p> </div> |

|                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                 |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  | <ul style="list-style-type: none"> <li>• <b>Gate ways</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Select gateway(s) for this reseller                                                                                                                                                                                                                                                                             |
| <b>Terminator Settings</b>       | Reseller's billing settings for outgoing calls                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                 |
|                                  | <ul style="list-style-type: none"> <li>• <b>TERM Rates</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <p>Rates for outgoing events from customers under a current reseller. Enables resellers billing mode</p> <div>  <b>Tip</b><br/> For more information about resellers billing mode, address this <a href="#">article</a> </div> |
|                                  | <ul style="list-style-type: none"> <li>• <b>TERM Capacity</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Termination capacity for all clients, belonging to this reseller. Leave this field empty for unlimited capacity                                                                                                                                                                                                 |
| <b>Fraud Protection</b> checkbox | <p>Enables/disables administrator notification in case of multiple simultaneous calls to the same number from the current Reseller.</p> <div>  <b>Attention</b><br/> Please note that all notifications can be found in <b>System &gt; Events Log</b>. If you want to receive them to exact email, go to the <b>Configuration</b> tab of the <b>Events Log</b> section, and add a new rule with the indication of target email and <b>aaa.fraud</b> value in the <b>Tag</b> field. </div> <p>Here you need to specify the following:</p> |                                                                                                                                                                                                                                                                                                                 |
|                                  | <ul style="list-style-type: none"> <li>• <b>Notification Frequency</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Set minimum time in seconds between sent notifications (minimum interval must be <b>0 sec</b> )                                                                                                                                                                                                                 |
|                                  | <ul style="list-style-type: none"> <li>• <b>Skip Digits</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Define the quantity 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.                                                                                        |
| <b>Origination Settings</b>      | Current Reseller's billing settings for incoming calls                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                 |
|                                  | <ul style="list-style-type: none"> <li>• <b>Postpaid</b> checkbox</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 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.                           |
|                                  | <ul style="list-style-type: none"> <li>• <b>Credit</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | The additional field next to the <b>Postpaid</b> checkbox. User can indicate an amount of reseller's credit                                                                                                                                                                                                     |
|                                  | <ul style="list-style-type: none"> <li>• <b>ORIG Rates</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Specify rates for incoming events from customers under a current reseller. Enables resellers billing mode                                                                                                                                                                                                       |
|                                  | <ul style="list-style-type: none"> <li>• <b>ORIG Capacity</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Indicate origination capacity for all clients, belonging to this reseller. Leave this field empty for unlimited capacity                                                                                                                                                                                        |
| <b>Invoicing Information</b>     | Current Reseller's invoicing settings                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                 |
|                                  | <ul style="list-style-type: none"> <li>• <b>Date</b></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <p>Allows you to select how the system sets an invoicing date:</p> <ul style="list-style-type: none"> <li>• <b>Real date</b> – sets an invoicing date to actual invoicing date</li> <li>• <b>Last day</b> – sets an invoicing date to date of last day of invoicing period</li> </ul>                           |

|                                |                                                                                                                                                                                                                                                                                                    |                                                                                                                                   |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
|                                | <ul style="list-style-type: none"> <li>• <b>Templ<br/>ate</b></li> </ul>                                                                                                                                                                                                                           | Select an invoice template that will be assigned to a reseller                                                                    |
|                                | <ul style="list-style-type: none"> <li>• <b>No<br/>Tpl</b></li> </ul>                                                                                                                                                                                                                              | Allows to define a default format of invoice's name                                                                               |
|                                | <ul style="list-style-type: none"> <li>• <b>Last<br/>No</b></li> </ul>                                                                                                                                                                                                                             | Define the last used invoice number                                                                                               |
| <b>SureTax<br/>Settings</b>    | 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 <a href="#">US Taxation</a> . |                                                                                                                                   |
|                                | <ul style="list-style-type: none"> <li>• <b>Client<br/>Numb<br/>er</b></li> </ul>                                                                                                                                                                                                                  | Specify a unique number that identifies an individual in the SureTax service                                                      |
|                                | <ul style="list-style-type: none"> <li>• <b>Valida<br/>tion<br/>Key</b></li> </ul>                                                                                                                                                                                                                 | Define a unique validation key of the SureTax service                                                                             |
| <b>Contact<br/>Information</b> | Some additional information                                                                                                                                                                                                                                                                        |                                                                                                                                   |
|                                | <ul style="list-style-type: none"> <li>• <b>Email</b></li> </ul>                                                                                                                                                                                                                                   | Company's email (it is required to specify an email to receive notifications). Use only Latin characters. This field is mandatory |
|                                | <ul style="list-style-type: none"> <li>• <b>Posta<br/>l<br/>Addre<br/>ss</b></li> </ul>                                                                                                                                                                                                            | Company's postal address                                                                                                          |
|                                | <ul style="list-style-type: none"> <li>• <b>Tax<br/>ID</b></li> </ul>                                                                                                                                                                                                                              | An ID of the tax-paying entity                                                                                                    |
|                                | <ul style="list-style-type: none"> <li>• <b>Reg<br/>ID</b></li> </ul>                                                                                                                                                                                                                              | Company's registration ID                                                                                                         |
|                                | <ul style="list-style-type: none"> <li>• <b>Bank<br/>Acco<br/>unt</b></li> </ul>                                                                                                                                                                                                                   | Company's bank account info                                                                                                       |
| <b>Company<br/>Logo</b>        | 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.                                                                                                             |                                                                                                                                   |
| <b>Mail<br/>Templates</b>      | 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

The screenshot shows a dialog box titled 'Resellers' with a red border around the title bar. The dialog is divided into two sections: 'SYSTEM INFORMATION' and 'CONTACT INFORMATION'. In the 'SYSTEM INFORMATION' section, there are four fields: 'Name' (text input with 'Manager' entered), 'Parent' (dropdown menu showing 'Reseller 1'), 'Status' (dropdown menu showing 'Active'), and 'Client's Template' (empty dropdown). The 'CONTACT INFORMATION' section has two fields: 'E-mail' (empty text input) and 'Postal Address' (empty text area). At the bottom right, there are three buttons: 'OK' (blue), 'Cancel' (gray), and 'Apply' (gray).

| Information block   | Fields Description                  |                                                                                                                                  |
|---------------------|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| System Information  | General information about a Manager |                                                                                                                                  |
|                     | • <b>Name</b>                       | Here you can specify the name of a manager. This field is mandatory.                                                             |
|                     | • <b>Parent</b>                     | Select a parent for a manager                                                                                                    |
|                     | • <b>Status</b>                     | Select the current status of a manager: <ul style="list-style-type: none"><li>• <b>Active</b></li><li>• <b>Deleted</b></li></ul> |
| Contact Information | Some additional information         |                                                                                                                                  |
|                     | • <b>Email</b>                      | Manager's email. Use only Latin characters.                                                                                      |
|                     | • <b>Postal Address</b>             | 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

The screenshot shows a web interface for editing a manager's profile. At the top, there's a tab labeled 'Resellers' and a title 'Manager 1'. Below this, the 'SYSTEM INFORMATION' section contains fields for 'Name' (Manager 1), 'Parent' (Reseller 1), 'Status' (Active), and 'Client's Template' (Active). The 'Status' dropdown menu is open, showing 'Active' and 'Deleted' options. A red arrow points to the 'Deleted' option. Below this, the 'CONTACT INFORMATION' section contains fields for 'E-mail' (manager@mail.com) and 'Postal Address'. At the bottom, there are four buttons: 'Full Delete' (highlighted with a red border), 'OK', 'Cancel', and 'Apply'.

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

Edit Reseller

**Custom Fields**

Rates Notifications

Reseller 1

CUSTOM FIELDS

+ Add Custom Field

|                 |            |  |
|-----------------|------------|--|
| Field Key       | Title      |  |
| voip_phone_sell | VoIP Phone |  |

CUSTOM PACKAGE FIELDS

+ Add Custom Field

|           |       |  |
|-----------|-------|--|
| Field Key | Title |  |
|           |       |  |

OK

Cancel

Apply

## Rates Notifications

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

Screenshot: Rates Notifications

Edit Reseller

Custom Fields

**Rates Notifications**

Reseller 1

STEP 2: SPECIFY DATE AND FORMAT OPTIONS

Date Format:

Code Deck:

Codes Output: separate rows

Data format: CSV

Fields Delimiter: ;

☒ with headers row

☐ codes from code deck

HEADER TEXT

FOOTER TEXT

Column #1: Code

Column #2: Code Name

Column #3: Rate

Column #4:

Column #5:

Column #6:

Column #7:

Column #8:

Column #9:

Column #10:

Column #11:

Column #12:

Column #13:

OK

Cancel

Apply

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

| Field                   | Description                                                                                                                                                                                                                                                                       |                        |                                       |                         |                                                                                   |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|---------------------------------------|-------------------------|-----------------------------------------------------------------------------------|
| <b>Date Format</b>      | 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 <b>25-02-2018</b> .                                                                                                                              |                        |                                       |                         |                                                                                   |
| <b>Code Deck</b>        | Select a code deck here to rewrite code names in an export file if needed                                                                                                                                                                                                         |                        |                                       |                         |                                                                                   |
| <b>Codes Output</b>     | Select a way codes must be displayed <table> <tr> <td>• <b>Separate Rows</b></td><td>Each code is placed into a single row</td></tr> <tr> <td>• <b>Delimited List</b></td><td>Codes are grouped by a code name in a row. For example, <b>5510, 5511, 5512</b>.</td></tr> </table> | • <b>Separate Rows</b> | Each code is placed into a single row | • <b>Delimited List</b> | Codes are grouped by a code name in a row. For example, <b>5510, 5511, 5512</b> . |
| • <b>Separate Rows</b>  | Each code is placed into a single row                                                                                                                                                                                                                                             |                        |                                       |                         |                                                                                   |
| • <b>Delimited List</b> | Codes are grouped by a code name in a row. For example, <b>5510, 5511, 5512</b> .                                                                                                                                                                                                 |                        |                                       |                         |                                                                                   |

|                                      |                                                                                                                |                                                                                                           |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
|                                      | <ul style="list-style-type: none"><li><b><i>Ranges List</i></b></li></ul>                                      | Codes are grouped by a code name into ranges plus delimiter. For example, <b><i>5510-5512, 5515</i></b> . |
| <b>Data Format</b>                   | Specify an output file format, <b>.xls</b> or <b>.csv</b>                                                      |                                                                                                           |
| <b>Fields Delimiter</b>              | Set a delimiter for the fields if you've chosen <b>.csv</b> . For <b>.xls</b> format this field is unavailable |                                                                                                           |
| <b>With headers row</b> checkbox     | Include a row with column names in a file                                                                      |                                                                                                           |
| <b>Codes from code deck</b> checkbox | Include only codes, which are present in a specified <b>Code Deck</b>                                          |                                                                                                           |
| <b>Header Text/Footer Text</b>       | 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                                                                                                                                                                                                                               |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Code / Code Name</b>          | Code or Code Name of a respective rate                                                                                                                                                                                                    |
| <b>Effective Date</b>            | Date on which a rate to be applied                                                                                                                                                                                                        |
| <b>Rate</b>                      | Price                                                                                                                                                                                                                                     |
| <b>Min Volume</b>                | The minimum volume of chargeable events                                                                                                                                                                                                   |
| <b>Interval</b>                  | Chargeable interval                                                                                                                                                                                                                       |
| <b>Grace Volume</b>              | Free of charge interval                                                                                                                                                                                                                   |
| <b>Setup Fee</b>                 | Interval of a setup fee                                                                                                                                                                                                                   |
| <b>Profile</b>                   | Time profile ( <i>all time, business time, non-business time, weekends</i> )                                                                                                                                                              |
| <b>End Date</b>                  | Date on which the rate ends                                                                                                                                                                                                               |
| <b>Previous Rate</b>             | Rate used before the present time                                                                                                                                                                                                         |
| <b>Prev Diff</b>                 | Shows how current rate differs from a previous one after import                                                                                                                                                                           |
| <b>Prev Diff Status</b>          | Shows how the current rate's status changed in comparison to a previous one (unchanged, increased, decreased)                                                                                                                             |
| <b>Prev Diff (export)</b>        | Shows how the current rate differs from a previous one after export                                                                                                                                                                       |
| <b>Prev Diff Status (export)</b> | Rate's changes after the last export. Shows the status of how the current rate differs from a previous one.<br>The rate will have an <b>unchanged</b> status if the <b>Effective date</b> is lower than the <b>Last Notification Date</b> |

| 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)        |

|               |                                             |
|---------------|---------------------------------------------|
| <b>Notes</b>  | Additional information                      |
| <b>Tag</b>    | Tags that are assigned to a respective rate |
| <b>Policy</b> | 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

| Field            | Description                                                                                                                                                               | Value             |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| Login            | Add your API login ID                                                                                                                                                     | sdgfsdgh          |
| Transaction Key  | Add your API transaction key                                                                                                                                              | *****             |
| Gateway Currency | Currency which will be used by user to perform a payment.                                                                                                                 | U.S. Dollar (USD) |
| System Currency  | This setting reflects currency of the gateway. Amount received will be treated as a specified currency. Leave empty if not required for the gateway (e.g., top-up cards). | USD               |
| Payment Account  | Specify account which will be used for transactions from this payment gateway.                                                                                            | General           |

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

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

## Configuring Mail Templates

There are also different mail templates you can configure in your company's profile:

Screenshot: Mail Templates

- MAIL TEMPLATE: INVOICE
- MAIL TEMPLATE: INVOICE UNPAID REMINDER
- MAIL TEMPLATE: OVERDUE REMINDER
- MAIL TEMPLATE: LOW BALANCE NOTIFICATION
- MAIL TEMPLATE: RATES NOTIFICATOR
- MAIL TEMPLATE: FACTORS WATCHER
- MAIL TEMPLATE: REPORTS WATCHER

| 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)") |

|                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Mail Template: Overdue Reminder</b>         | Used when sending a payment notification to a customer (sending notification on "Notify Days (after)")                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Mail Template: Low Balance Notification</b> | Used when sending a low balance notification to a customer <div>  <b>Tip</b><br/> You can <b>add a rounding rule</b> for a client's balance during low balance notification. For example, to round up to 2 decimal places, you need to add the variable <code>\${client['balance']}</code> in the <b>Mail template: Low Balance Notification</b> in reseller's settings and specify the number of rounding decimals in the <b>Totals Precision</b> field of the <b>Currencies</b> section. </div> |
| <b>Mail Template: Rates Notificator</b>        | Used when sending a rate changes notification to a customer                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Mail Template: Factors Watcher</b>          | Used when sending a notification to a customer once a Preset by Factors Watcher has been added                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Mail Template: Reports Watcher</b>          | Used when sending reports by email                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

All mail templates have the following structure:

Screenshot: Reseller/Mail Template: Factors Watcher form

MAIL TEMPLATE: FACTORS WATCHER

From: "\${company['name']}" <\${company['c\_email']}>

BCC:

Subject: Factors watcher notification \${company['name']}

Direction \${direction} blocked by: \${reason}

--

Autogenerated by JeraSoft VCS

| Field            | Description                                                                            |                                                                                                                           |
|------------------|----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>From</b>      | Specify a name and email of a company                                                  |                                                                                                                           |
| <b>BCC</b>       | Specify who will receive a blind copy of an email                                      |                                                                                                                           |
| <b>Subject</b>   | Indicate an email subject that may contain company name, invoice number, etc.          |                                                                                                                           |
| <b>Mail Body</b> | Content of the letter. On the screenshot above the following information is specified: |                                                                                                                           |
|                  | <ul style="list-style-type: none"> <li><b>Direction {direction}</b></li> </ul>         | Code or Code name that will be automatically filled in by the system                                                      |
|                  | <ul style="list-style-type: none"> <li><b>Reason {reason}</b></li> </ul>               | Values specified in Factors Watcher settings (for example, <b>calls_total</b> > 0).                                       |
|                  | <ul style="list-style-type: none"> <li><b>Values {values}</b></li> </ul>               | Actual value, which was exceeding the one specified in Factors Watcher settings (for example, <b>calls_total</b> = 1234). |

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                                                                                               |
|-----------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| <code>\${client['status']}</code>             | Client's status: <ul style="list-style-type: none"><li>• <b>Active</b></li><li>• <b>Deleted</b></li></ul> |
| <code>\${client['name']}</code>               | Client's name                                                                                             |
| <code>\${client['balance']}</code>            | Client's live balance                                                                                     |
| <code>\${client['balance_accountant']}</code> | Client's fixed balance                                                                                    |
| <code>\${client['credit']}</code>             | Client's available credit                                                                                 |
| <code>\${client['c_company']}</code>          | Client's official company name                                                                            |
| <code>\${client['c_address']}</code>          | Post address of a client's company                                                                        |
| <code>\${client['c_email']}</code>            | Client's email                                                                                            |
| <code>\${client['locale']}</code>             | Client's location                                                                                         |
| <code>\${client['currencies_id']}</code>      | Currency ID, used by a client                                                                             |
| <code>\${client['tz']}</code>                 | Timezone of a client                                                                                      |
| <code>\${client['taxes_profiles_id']}</code>  | Taxes profile's ID, used by a client                                                                      |
| <code>\${client['tax_id']}</code>             | Customers tax ID of a client's company                                                                    |
| <code>\${client['reg_id']}</code>             | Registration ID of a client's company                                                                     |

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

| Templates Configuration Syntax                 | Description                                                                                                |
|------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| <code>\${company['status']}</code>             | Company's status: <ul style="list-style-type: none"><li>• <b>Active</b></li><li>• <b>Deleted</b></li></ul> |
| <code>\${company['balance']}</code>            | Company's current balance                                                                                  |
| <code>\${company['balance_accountant']}</code> | Company's fixed balance                                                                                    |
| <code>\${company['credit']}</code>             | Company's available credit                                                                                 |
| <code>\${company['c_address']}</code>          | Company's postal address                                                                                   |
| <code>\${company['c_email']}</code>            | Email of a company                                                                                         |
| <code>\${company['locale']}</code>             | Company's location                                                                                         |
| <code>\${company['currencies_id']}</code>      | Company's currency ID                                                                                      |
| <code>\${company['tz']}</code>                 | Company's timezone                                                                                         |
| <code>\${company['taxes_profiles_id']}</code>  | Company's taxes profiles                                                                                   |
| <code>\${company['name']}</code>               | Name of a company                                                                                          |
| <code>\${company['tax_id']}</code>             | Company's customers tax ID                                                                                 |
| <code>\${company['reg_id']}</code>             | Company's registration ID                                                                                  |

#### Configuration Syntax for Mail Template: Invoice and Payment Reminder Notification

| Templates Configuration Syntax   | Description  |
|----------------------------------|--------------|
| <code>\${invoice['c_dt']}</code> | Invoice date |

|                                           |                        |
|-------------------------------------------|------------------------|
| <code>\${invoice['type']}</code>          | Invoice type           |
| <code>\${invoice['amount']}</code>        | Invoice total sum      |
| <code>\${invoice['period_start']}</code>  | Invoice period start   |
| <code>\${invoice['period_finish']}</code> | Invoice period end     |
| <code>\${invoice['due_date']}</code>      | Invoice due date       |
| <code>\${invoice['no']}</code>            | Invoice number         |
| <code>\${invoice['descr']}</code>         | Invoice comments       |
| <code>\${invoice['tz']}</code>            | Invoice timezone       |
| <code>\${invoice['state']}</code>         | Invoice state          |
| <code>\${invoice['name']}</code>          | Invoiced client's name |
| <code>\${client['currency']}</code>       | Client's currency      |

**Configuration Syntax for Mail Template: Low Balance Notification**

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

**Configuration Syntax for Mail Template: Rates Notificator**

| Templates Configuration Syntax      | Description                            |
|-------------------------------------|----------------------------------------|
| <code>\${msg['rt_name']}</code>     | Rate table name                        |
| <code>\${msg['lastedit_dt']}</code> | Date when a rate table was edited last |
| <code>\${date}</code>               | Date when the notification was sent    |

**Configuration Syntax for Mail Template: Reports Watcher**

| Templates Configuration Syntax        | Description                                                           |
|---------------------------------------|-----------------------------------------------------------------------|
| <code>\${report["title"]}</code>      | Title of a report template                                            |
| <code>\${report["interval"]}</code>   | Actual report period                                                  |
| <code>\${report["title-full"]}</code> | Title of a report template with indication of an actual report period |
| <code>\${report["webUrl"]}</code>     | URL to view a report on the web portal                                |
| <code>\${report["id"]}</code>         | 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