

Rates Analysis

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Rates Analysis Form

Rates Analysis is an advanced feature of the **JeraSoft Billing Rates Management Module**. It allows you to analyze and compare rates within the JeraSoft Billing web interface without the usage of any third-party software.

Screenshot: Rates Analysis section

Rates Analysis

Events

Dst Code

Dst Code Name

Country Name

Extras

Actual On

Master Table

Lowest Position

Get Margins For

Tan

FILTERS

Outlook:

rates comparison

Service:

Calls

Originators:

Terminators:

Rate Tables:

Client Tags:

Group By:

Dst Code

Save Query

Query

OUTPUT

Type:

Web

Currency:

USD

Dst Code Deck:

Simulate Long:

Creating a New Analysis Report

To analyze and compare different rates, you need to fill in the form with the next parameters:

Information Block	Field Description
Filters	On the Filters menu, select the required parameters for the report. To cancel any filter, click on the delete  icon next to the filter. You can start a quick search by typing filters' names in the field at the top of a drop-down menu with filters.
	<div><div>Outlook</div><div>Choose the form of the rate analysis report for data display. Please note that this field is mandatory and should be filled in to make a report.<ul style="list-style-type: none">• Rates comparison - compares rates in general and particular rates assigned to certain Clients and Accounts.• Least costs list - shows the cheapest rate for each code in a particular rate table</div></div>
	<div><div>Service</div><div>Select a service for rates analysis</div></div>
	<div><div>Originators</div><div>Specify origination clients for analysis</div></div>
	<div><div>Terminators</div><div>Indicate termination clients for analysis</div></div>
	<div><div>Rate Tables</div><div>Define rate tables for analysis</div></div>
	<div><div>Client Tags</div><div>Select clients matching specified tags for analysis</div></div>
	<div><div>Group by</div><div>Select a grouping option from the following list:<ul style="list-style-type: none">• Dst Code - aggregation by default output.• Dst Code Name - grouping by rate rows with the same names and rates for all codes in each rate table.This option is intended to simplify grouping, the system will automatically group data in specified columns.</div></div>
	<div><div>Additional Filters</div><div></div></div>

The accessible additional filters are:

- **Events:** *Dst Code, Dst Code Name, Country Name*
- **Extras:** *Client Tags, Actual On, Master Table, Lowest Position, Get Margins For, Tag, Rate Age*

Events settings

Dst Code	Specify a code of the needed destination.
Dst Code Name	Define a code name of the desired destination.
Country Name	Enter the name of the respective country.

Extra settings

Actual on	Define the Effective Date of rates.
Master Table	Specify a rate table that all other rate tables will be compared to. ⚠ Attention Please note that this field is active only during rate tables analysis
Lowest Position	Enter the number of the position from the full list of rates. For example, if you are looking for the cheapest destination in several rates, type 1 in this field. Please note that this feature only works with the Master Table option.
Tag	Indicate a tag, which relates to a specified rate table
Get margins for	Define a rate table, from which the respective margins will be taken. It is used to analyze margins.
Rate age	Specify the number of days

Output

This information block contains settings of the report output data.	
Type	Choose a format of the report from a drop-down list: <ul style="list-style-type: none"> • Web • CSV • Excel XLS • Excel XLSx <p>If CSV, Excel XLS or Excel XLSx type has been selected, an additional Send to field will be displayed. In this field, you can specify emails of the clients, to which the current report in the selected format will be sent.</p>
Currency	Specify a currency of the report. All values will be automatically converted to the specified currency in the report.
Code Deck	Select a code deck from a drop-down list. All codes in the following report will be presented according to the specified code deck.
Simulate long codes checkbox	Check if a rate table does not have codes, which are presented in other tables for simulating them using shorter codes. ⚠ Attention If you check the Simulate long codes checkbox, the system will try to simulate the longest available code with the shorter one. For example, we analyze two rate tables, one of which has code 380, and the other has 380 and 38044 codes. When the mentioned checkbox is active, the first rate table will have unavailable 38044 code simulated with the price of available 380. Rates like these have the Simulated label when you hover the mouse pointer over them and are colored in light-red, light-green and grey respectively.

After clicking the **Query** button, the system will form a list of rates with prices for each destination. The highest rate available for the destination is colored in red, the lowest – in green, and middle rates are colored in black.

Screenshot: Rates Analysis section

Rates Analysis

Events
Dst Code
Dst Code Name
Country Name
Extras
Actual On
Master Table
Lowest Position
Get Margins For
Tag

FILTERS
Outlook: rates comparison
Service: Calls
Originators: coolguy x bestCustomer x Client 0 ORIG x
Terminators: bestCustomer x client2 x Client 0 TERM x ghosterm x
Rate Tables: ORIG RT - bestCustomer x ORIG RT - client2 x ORIG RT - coolguy x
RT 0 ORIG x RT 0 TERM x TERM RT - bestCustomer x
Client Tags:
Group By: Dst Code x
Save Query Query

OUTPUT
Type: Web
Currency: USD
Dst Code Deck: DEFAULT
Simulate Long:

Export to CSV Export to XLSx

Dst Code	Dst Code Name	ORIG RT - bestCustomer	ORIG RT - client2	ORIG RT - coolguy	RT 0 ORIG	RT 0 TERM	TERM RT - bestCustomer	coolguy Orig	bestCustomer Orig	Client 0 ORIG Orig	bestCustomer Term	Client 0 TERM Term	ghosterm Term
1	USA	2.0000	5.0000	0.5000	-	-	0.7000	-	-	-	-	-	-
123	Code 123	-	-	-	4.0000	2.0000	-	-	-	-	-	-	-
3	-	-	0.4000	-	-	-	-	-	-	-	-	-	-
417	Code 417	-	-	-	5.0000	3.0000	-	-	-	-	-	-	-

Also, there is a possibility to **select all** values in the **Rates Analysis form** for the following fields: **Rate tables**, **Originators**, **Terminators**.

Screenshot: Rates Analysis section

Rates Analysis

Events
Dst Code
Dst Code Name
Country Name
Extras
Actual On
Master Table
Lowest Position
Get Margins For
Tag

FILTERS
Outlook: rates comparison
Service: Calls
Originators: ALL x
Terminators: ALL x
Rate Tables: ALL x
Client Tags:
Group By: Dst Code x
Save Query Query

OUTPUT
Type: Web
Currency: USD
Dst Code Deck: DEFAULT
Simulate Long:

By clicking the **Info** icon above the report on the right, the **user's name** and **time/date**, when a report was generated, will be displayed in a pop-up window.

Screenshot: Info icon


Generated by: Administrator on 01/24/2018 16:17:47 +0000

Creating a New Template

Also, you can create a template and save specified parameters by clicking the **Save Query** button. A pop-up window with settings will appear, where you need to fill out the following form:

Screenshot: New Template form

Reports Templates				
RATES ANALYSIS				
Title:	<input type="text"/>	<input checked="" type="checkbox"/> WATCH (NOT AVAILABLE FOR WEB OUTPUT TYPE)		
Reseller:	<input type="text" value="all resellers"/>	Recipients:	<input type="text"/>	
Visibility:	<input type="text" value="Private"/>	Run Time:	<input type="text" value="06:00"/>	
		Run Time Timezone:	<input type="text" value="UTC"/>	
		Days of Week:	<input type="text" value="Mo x Tu x We x Th x Fr x Sa x Su x"/>	
REPORT QUERY				
<ul style="list-style-type: none"> Events Dst Code Dst Code Name Country Name Extras Actual On Master Table Lowest Position Get Margins For Tag 	FILTERS		OUTPUT	
	Outlook:	<input type="text" value="rates comparison"/>	Type:	<input type="text" value="Web"/>
	Service:	<input type="text" value="Calls"/>	Currency:	<input type="text" value="USD"/>
	Originators:	<input type="text" value="coolguy x bestCustomer x Client 0 ORIG x"/>	Dst Code Deck:	<input type="text" value="DEFAULT"/>
	Terminators:	<input type="text" value="bestCustomer x client2 x Client 0 TERM x ghosterm x"/>	Simulate Long:	<input type="checkbox"/>
	Rate Tables:	<input type="text" value="ORIG RT - bestCustomer x ORIG RT - client2 x ORIG RT - coolguy x RT 0 ORIG x RT 0 TERM x TERM RT - bestCustomer x"/>		
	Client Tags:	<input type="text"/>		
	Group By:	<input type="text" value="Dst Code x"/>		
				<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/>

Section	Description						
Rates Analysis	Here you can specify parameters for the template that will be used while running reports						
	<table><tr><td>Title</td><td>Specify a name of the template</td></tr><tr><td>Reseller</td><td>Indicate a Reseller for the report template</td></tr><tr><td>Visibility</td><td><p>It allows controlling the visibility of respective reports templates. You can set up whether you want to keep templates private or leave them visible for users under a specified Reseller.</p><p>To enable this option, select one parameter from the drop-down list:</p><ul style="list-style-type: none">• Public - available for users according to the settings of the Reseller field.• Private - accessible strictly for the creator.</td></tr></table>	Title	Specify a name of the template	Reseller	Indicate a Reseller for the report template	Visibility	<p>It allows controlling the visibility of respective reports templates. You can set up whether you want to keep templates private or leave them visible for users under a specified Reseller.</p> <p>To enable this option, select one parameter from the drop-down list:</p> <ul style="list-style-type: none">• Public - available for users according to the settings of the Reseller field.• Private - accessible strictly for the creator.
	Title	Specify a name of the template					
	Reseller	Indicate a Reseller for the report template					
Visibility	<p>It allows controlling the visibility of respective reports templates. You can set up whether you want to keep templates private or leave them visible for users under a specified Reseller.</p> <p>To enable this option, select one parameter from the drop-down list:</p> <ul style="list-style-type: none">• Public - available for users according to the settings of the Reseller field.• Private - accessible strictly for the creator.						
Watch	<p>This tool allows to generate the report automatically at the appropriate time and send the results to the list of emails.</p> <div> Attention</div> <p>Please note that this tool is not available for Web output type, only for CSV/Excel XLS/Excel XLSx</p>						
	<table><tr><td>Recipients</td><td>Specify recipients. You can indicate your own email, or other users of the system, or even 3rd parties</td></tr><tr><td>Run Time</td><td>Indicate an appropriate time to generate a report automatically, it could be several times, for example, 10:00, 12:00, 18:00</td></tr><tr><td>Days of Week</td><td>Indicate days of the week to generate a report automatically. For example, you can run a report only on Monday or each day of the week.</td></tr></table>	Recipients	Specify recipients. You can indicate your own email, or other users of the system, or even 3rd parties	Run Time	Indicate an appropriate time to generate a report automatically, it could be several times, for example, 10:00, 12:00, 18:00	Days of Week	Indicate days of the week to generate a report automatically. For example, you can run a report only on Monday or each day of the week .
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Run Time	Indicate an appropriate time to generate a report automatically, it could be several times, for example, 10:00, 12:00, 18:00						
Days of Week	Indicate days of the week to generate a report automatically. For example, you can run a report only on Monday or each day of the week .						
Report Query	Here you need to check filters and the output type. These values will be pre-selected by default according to the formed rate analysis query.						

After a template has been created, a new **Load Query** button will be added to the section. By clicking it, you can select report settings to be filled in from a list of templates for rates analysis.

Export generated report

You can export report data either in .xls file or .csv that would contain currently presented data. Click the **Export to XLSx** or **Export to CSV** button to download a file of the respective format.

Sharing a Report

The link refers to the report data valid for a specific moment.

You can also view the additional information about the generated report by hovering over the **Info** icon, which is located under the **Output** section:

Title	Description
Generated by	Indicates the Role of the user who generated a report and specifies a generation time
Duration	Time spent to generate a report

Rates Analysis

Events

- Dst Code
- Dst Code Name
- Country Name

Extras

- Actual on
- Master Table
- Lowest Position
- Get Margins for Tax

FILTERS

Outlook: rates comparison

Service: Calls

Originators: client 2 x client 1

Terminators:

Rate Tables:

Client Tags:

Group by: Dst Code

Save Query Query

OUTPUT

Type: Web

Currency: USD

Dst Code Deck:

Simulate Long: ☐

Dst Code	Dst Code Name	client 2 account 2 Orig	cli	Generated by: Administrator on 06/25/2020 11:58:15 +0000 Duration: 0.0702 sec
44	-		0.2100	8000