# Routing Plans

**In this article**

## Section overview

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

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

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

*Screenshot: Routing Plans section*
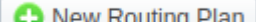


| Column | Description |
|---|---|
| **ID** | ID number of a routing plan |
| **Name** | Name of a routing plan |
| **Reseller** | Name of a reseller a corresponding routing plan has been assigned to as an owner |
| **Code Deck** | Name of code deck that has been applied to a corresponding routing plan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

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

| Button/Icon | Description |
|---|---|
| New Routing Plan | Allows to create a new routing plan |
| (copy icon) | Allows to copy an existing routing plan to the section |
| (delete icon) | Allows deleting a routing planfrom the system |

## Advanced Search

In the top right corner of the section above the table, an **Advanced Search** drop-down menu is located. By clicking on a blue downward arrow ⌄ icon, a drop-down menu with the following structure is displayed:

*Screenshot: Advanced Search drop-down menu*



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

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

## Adding a New Routing Plan

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

*Screenshot: Routing Plans window*



| Information Block | Fields Description |
|---|---|
| **General Information** | General routing plan information |

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

**Sample Scenarios**

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

⚠️ **Attention**

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

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

# Routing Rules tab

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

*Screenshot: Routing Rules tab*



| Field | Description |
|---|---|
| **Priority** | Define a priority of rule execution if two or more rules have similar code or code name specified |
| **Code** | Enter a code, which will be used in a current routing rule, use * as a wildcard. |
| **Code Name** | If you have a code deck assigned to this routing plan, a corresponding code name, specified in the **Code** field, will be displayed automatically. If |
| **Type** | Select a type of routing for a current rule:<br><br>• **Static Client** - if selected, in the **Terminator/Policy** field you can specify a certain termination client<br>• **Static Account** - if selected, in the **Terminator/Policy** field you can specify a certain termination account of a client<br>• **Dynamic** - if selected, in the **Terminator/Policy** field you can specify a certain dynamic policy for the rule<br>• **DID** - if selected, the **Terminator/Policy** and **Code** fields become inactive |
| **Terminator /Policy** | If you selected static type, you may specify a termination client/account here; if you selected dynamic type, specify routing policy for the current r |
| **PM** | Define a *Profit Margin* value for a current rule here.<br><br>⚠ **Attention**<br><br>If the **PM** field has been specified both for the entire routing plan and for a certain rule, **the latter has a higher priority.** |
| **Params** | A number of additional parameters available by clicking the  icon (see screenshot below)<br><br>• **Originator Tags** — You can specify respective originator tags here. If nothing is specified, it works for all.<br><br>• **all** - applies for originators if all specified tags are present.<br>• **any** - applies for originators if at least one of the specified tags is presented. |

- *Terminator Tags*

  Here you can add terminator tags that will be used for terminators. If nothing is indicated, it works only for terminators **without** tags. Ple

- *Time Profile*

  Specify a time profile from the list

- *Expiration Date*

  Here you can determine if a Rule will expire or not. If a date/time is specified here, the respective Rule will stop working after said times

  If empty, the said Rule will work indefinitely.

  ⓘ     If the Expiration Date will be set for the past, it will be highlighted in red to draw attention that it's not in use. With the next run o

- *Balancing*

  Define the percentage or proportion amount of traffic, which will be sent to a respective vendor who participates in balancing

  ⚠ **Attention**

  Please note that after changing *balancing value,* you will need to restart the **Traffic Rules manager** or wait till its next run.

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

  ✓ **Useful tip**

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

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

| | | |
|---|---|---|
| | • *N u m b e r L e n g th* | Set **minimum** and **maximum** length of destination number that will be matched by this routing rule |
| | • *M i n A SR* | Specify **minimum** ASR (successful records percentage) value to reject the routes that don't correspond to it |
| | • *M i n A CD* | Specify **minimum** ACD (in Service units) value to reject the routes that don't correspond to it |
| ***Capaci ty*** | Limit capacity for the current rule (leave blank for unlimited) | |
| ***Stop Hunt*** *checkb ox* | If this field is checked, this means that rule search will be stopped when matched with the current one and all the consecutive rules will not be ex | |

*Screenshot: Routing rules settings*



## Import/Export tab

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

*Screenshot: Import/Export tab*

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

*Screenshot: Importing file format*

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

⚠️ **Attention**

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

# Routing Plan

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

*Screenshot: Routing Plan tab*



# Knowledge Base Articles

**Error rendering macro 'contentbylabel'**

parameters should not be empty