Rates Analysis [old]

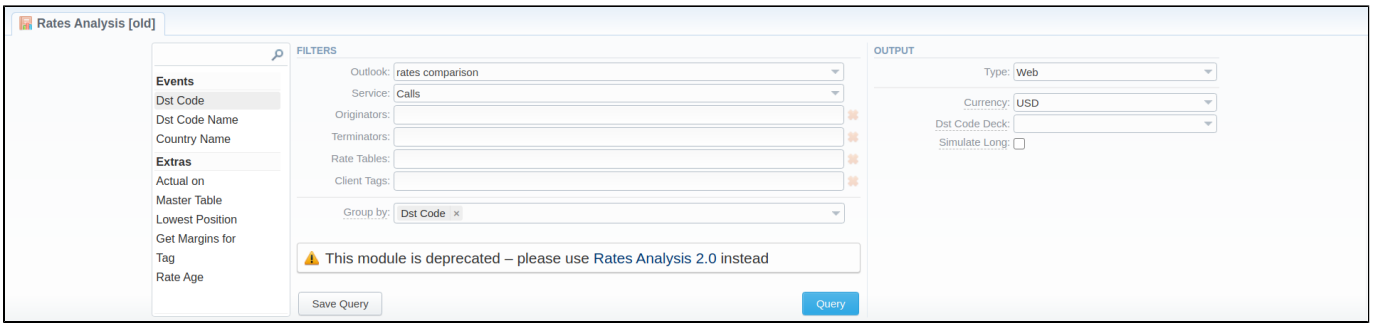
In this article

- Rates Analysis Form
- Creating a New Analysis Report
- Creating a New Template
- Export generated report
- Sharing a Report

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



Creating a New Analysis Report

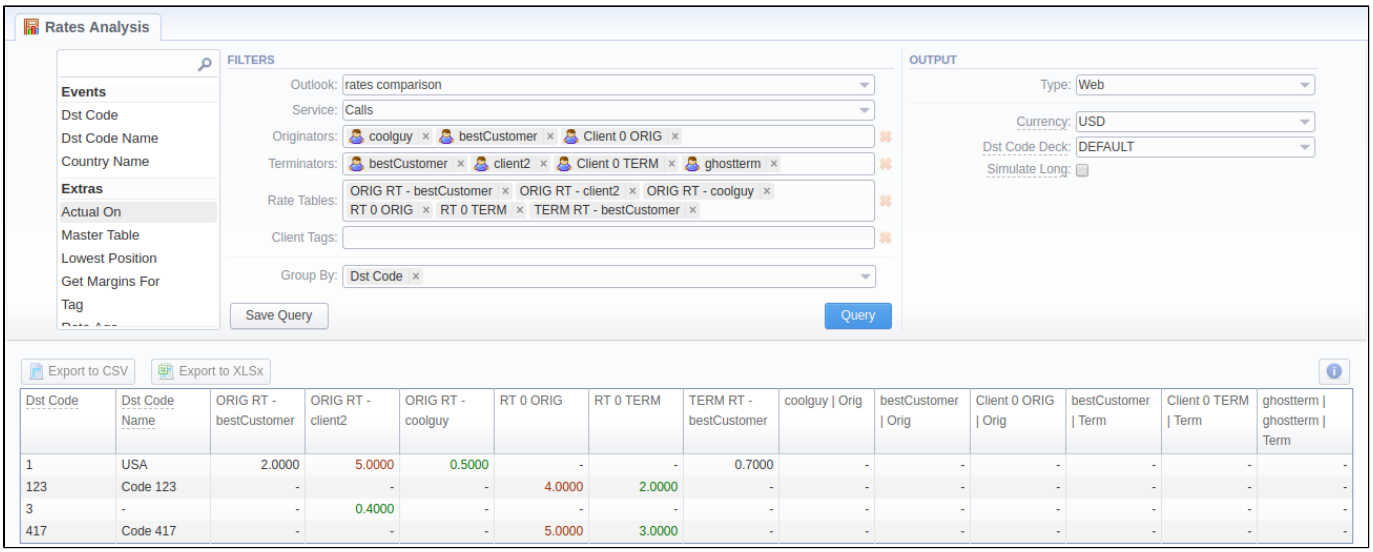
To analyze and compare different rates, you need to fill in the form with the next parameters:

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.	
	Outlook	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. • ***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
	Service	Select a service for rates analysis
	Originators	Specify origination clients for analysis
	Terminators	Indicate termination clients for analysis
	Rate Tables	Define rate tables for analysis
	Client Tags	Select clients matching specified tags for analysis
	Group by	Select a grouping option from the following list: • ***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.
	Additional Filters	

	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: • ***Web*** • ***CSV*** • ***Excel XLS*** • ***Excel XLSx*** 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.
	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



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

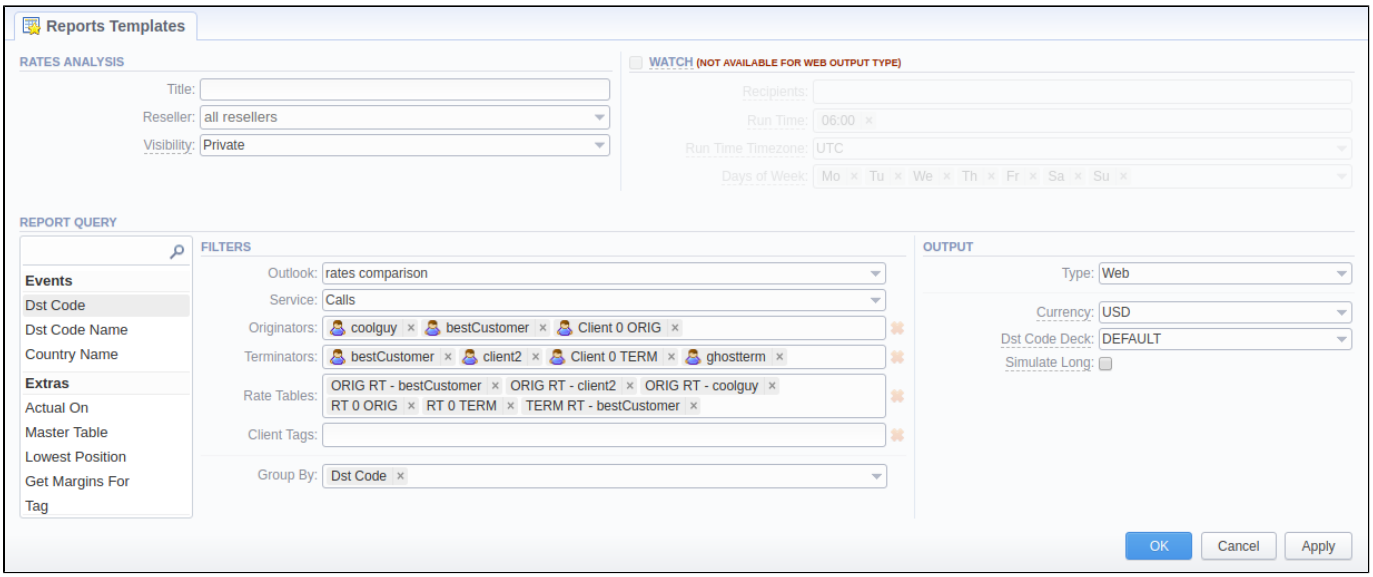
By clicking the **Info** icon above the report on the right, the **user's name** and **time/date**, when a report was generated, will be displayed in a pop-up window.

Screenshot: Info icon

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



Section	Description	
Rates Analysis	Here you can specify parameters for the template that will be used while running reports	
	Title	Specify a name of the template
	Reseller	Indicate a Reseller for the report template
	Visibility	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. To enable this option, select one parameter from the drop-down list: • ***Public*** **-** available for users according to the settings of the ***Reseller*** field. • ***Private*** **-** accessible strictly for the creator.
Watch	This tool allows to generate the report automatically at the appropriate time and send the results to the list of emails. **Attention** Please note that this tool is **not available** for ***Web*** output type, only for ***CSV/Excel XLS/Excel XLSx***	
	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**.
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.

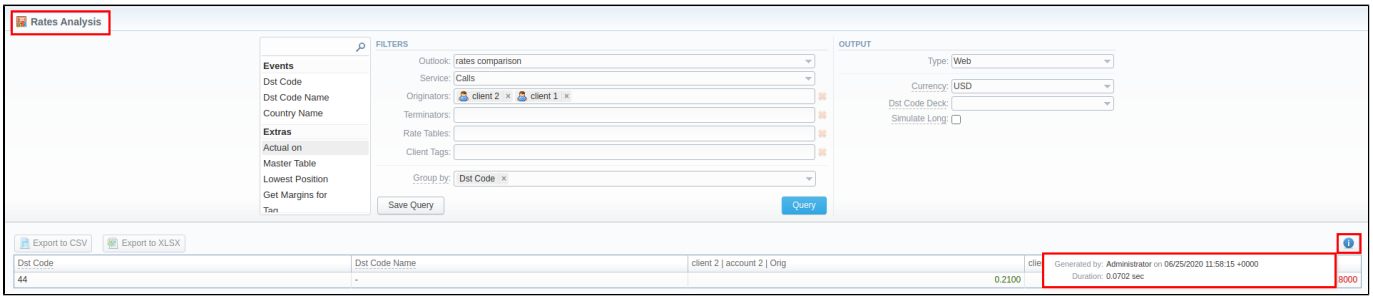
Sharing a Report

Each time you get a report output, the system generates a unique link in the format of "/view?id=<uniq-string>". It allows sharing data between the users, even if they belong to different resellers (the feature works similarly to Share by Link in Google Drive).

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

Example: When you send a link to a report, you ensure the recipient would see the same data as you do. If you change data in the system (for example, perform rerating), the previously copied link to the report will display data valid for the moment of generation (even though the actual data is now different).

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

Screenshot: Rates Analysis Info icon