

Clients

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Section overview

Beyond any doubts, clients are a cornerstone and the most valuable asset of any type of business. Hence, the **Clients** section is rightfully considered a core element of the whole **JeraSoft Billing**. In the section, user can manage the personal information of any client on the list, trace customer's balances, review resellers a particular client belongs to, etc. The section is presented in the form of a table with the following columns:

Screenshot: *Clients section*

Clients

Client's Templates

New Client

Export List

Mass Edit

Rows 1 – 8 of 8

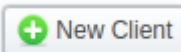
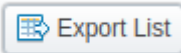
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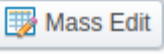















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ID	Name	Balance						Pay Terms	Tags	Reseller
		Available	Live	Fixed						
13	Customer A	32.00 USD	0.00	0.00	—				Company Name	
14	Customer B	-419.78 USD	-419.78	0.00	—				Company Name	
226	Customer C	No Limit USD	0.00	0.00	—				Sub-Reseller B	
227	Customer D	1 000.00 USD	0.00	0.00	—				Sub-Reseller B	
15	Vendor A	No Limit USD	103.70	0.00	—				Company Name	
12	Vendor B	No Limit USD	0.00	0.00	—				Company Name	
19	Vendor C	78.27 USD	78.27	0.00	—				Company Name	
11	Voxbone	7.03 USD	-2.97	-1.60	7/7				Company Name	


Column Name	Description	
ID	Client's identification number	
Name	Client's name	
Balance	Client's balance values	
	• Available	'Live' client's balance including allowed credit
	• Live	Client's balance calculated on the basis of the performed payments and processed calls
	• Fixed	Client's balance calculated on the basis of the outstanding invoices and performed payments
Pay Terms	Payment terms of each client	
Tags	List of tags, applied to a client	
Reseller	Name of reseller's company respective client belongs to	

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

Button/Icon	Description
	Allows adding a new client to the system
	Allows exporting a list of user's clients in a .csv file

	Allows managing the last invoice date of a client	
	Identifies the Orig client	
	Identifies the Term client	
	Identifies the Orig/Term client	
	Allows accessing the list of client's accounts in the Accounts section (an icon will be colored if an account is assigned)	
	Allows accessing the client's current routing plan (an icon will be colored if the plan is assigned)	
	Allows accessing the Traffic Processing section for dynamic routing management	
	Allows viewing client's rates (an icon will be colored if a rate table is assigned)	
	• ORIG	Rate tables for origination calls
	• TERM	Rate tables for termination calls
	Allows accessing the Subscriptions section for new clients packages management	
	Allows accessing the Transactions section for client's balance management	
	Allows accessing the Invoices section for client's invoices management	
	Allows accessing the Balance Report section for client's balance report (Live or Fixed) management (last 7 days of statistics)	
	Allows accessing the Summary Report section for client's summary report management (last 7 days of statistics)	
	Allows accessing the Mail Queue section to view sent emails history	
	Allows accessing the Audit Log section to view change history	
	Allows deleting a client from the system	


Warning

When you **delete the client** by changing the status to **deleted** or clicking a respective icon , the Client Panel of this client will be disabled and origination/termination settings of its accounts will be turned off. However, its accounts will not be deleted from the system.




Helpful Tip

- If the prepaid mode is enabled, calls will be subject to balance check on a stage of call authorization (when RADIUS Authorization is used). If the postpaid mode is enabled, calls duration will be limited to **Max all length** setting in **Configuration > Settings**.
- You can search through clients by **Name** and by first letters only (**start with** rule). To find all clients with a specified main email, use * (asterisk) in the **Main Email** field.


Advanced Search

In the top right corner of the section above the table, the **Advanced Search** drop-down menu is located. By clicking on a red downwards arrow  icon (clients in the section are filtered by **Active** status by default), the following drop-down menu is displayed:

Screenshot: Advanced Search drop-down menu

Information block	Fields & Description
General Settings	General information about the client
	<ul style="list-style-type: none"> • Name <p>Indicate a client's name</p>
	<ul style="list-style-type: none"> • Reseller <p>Select a reseller new client belongs to (this name will be used in invoices)</p>
	<ul style="list-style-type: none"> • Currency <p>Define preferred currency (will be used in invoices)</p>
	<ul style="list-style-type: none"> • Timezone <p>Choose the timezone from the drop-down list of all available. This timezone will be used in invoices by default. UTC is a default parameter for a timezone</p> <div>  Attention If this parameter is not indicated, the timezone of the database will be automatically applied to the client's settings of the zone. It could lead to some problems while working with packages, rate tables, or time profiles. </div>
	<ul style="list-style-type: none"> • Status <p>Select a respective status for the client:</p> <ul style="list-style-type: none"> • active • stop • deleted
	<ul style="list-style-type: none"> • Client's Template <p>Here you can apply the required template from the list to a new customer</p>
	<ul style="list-style-type: none"> • Tags <p>You can indicate tag(s) here that will be applied to a new customer. The tag doesn't need to be pre-existent in the system. You can provide an unlimited number of tags for each client.</p>
	<ul style="list-style-type: none"> • Tax Profile <p>You can specify a tax profile, which will be reflected in invoices. In order to select a tax profile in this field, the tax profile should be created first in the section Configuration>Taxes profiles. Check out the Taxes Profiles article for more information.</p> <p>There can be 3 types of the tax profiles used:</p> <ul style="list-style-type: none"> • Customer (you will need to manage the tax values manually) • SureTax (integration with a third-party tax calculation service) • Compliance (integration with a third-party tax calculation service) <div>  Attention For proper usage of SureTax and Compliance, the Invoice Number should contain only Latin and numeric characters. Max length is 40 symbols. Dst and Src Numbers should be in the NPANXXNNNN (10 digits) format. More info about these third-party tax calculation services can be found in the article US Taxation. </div>
	<ul style="list-style-type: none"> • Bill Events by <p>Select how the system should bill events of a new client – by setup time, by connect time or by disconnect time (most switch models use disconnect time)</p>
	<ul style="list-style-type: none"> • Hidden Numbers c checkbox <p>When checked, allows you to hide some part of the client's destination numbers in invoices, xDRs reports and during export.</p> <div>  Tip If the client has the Hidden Numbers option enabled and the code appears in the code deck from the invoice template, the number, code, and code name become hidden. If the code doesn't appear in the code deck, the last *n characters of the number are hidden. The code deck from the rate table is only used to identify code names. </div>

Client Panel checkbox	Activates/deactivates the login procedure to the client's control panel for this client. Customer can get access to this control panel by using the following link: http://vcs_address/clients/ , after filling in the following fields:	
	• Login	Client's login
	• Password	Client's password
Originator Settings	Settings for your customers, who send events to your switch. Clients' originator settings are as follows:	
	• Unlimited checkbox	Here you can set the unlimited credit for a client if you enable the checkbox. It is disabled by default.
	• Credit limit	The additional field next to the Unlimited checkbox. Here you can set the credit limit allowed for a client. You could fill this field with any of the positive or negative numbers, but no more than 9 digits. If the Unlimited checkbox is marked, this field becomes inactive .
	• Payment Terms	Select the payment terms template from the general list of all available ones in the Payment Terms section
	• Rate Table	From the list of all rate tables in the Rate Tables section, select an origination one for this client
	• Routing Plan	Select an appropriate routing plan that will be used to route all calls of this customer (but it may be overridden for any of the customer's accounts in the <i>Accounts</i> tab). The full list of routing plans is presented in the Routing Plans section
	• Capacity	Indicate the origination capacity of channels for this client. For unlimited amount, leave empty
Terminator Settings	Settings for your vendors, whom you send events from your switch. Clients' termination settings are as follows:	
	• Rate Table	From the list of all rate tables, select a termination one for this client
	• Credit limit	Define the credit limit you have on the vendor's side. It will be applied to vendors during the routing check to remove them from the routing result if vendor balance + credit limit hits the entered threshold.
	• Capacity	Define the termination capacity of channels for this client. For unlimited amount, leave empty
Low Balance Notifications	Here you can set up whether the system should send low balance notifications or not when the client's Available balance is lower than a set threshold	
	• Notify Client	When clients' balance+credit is below the entered value, the system will send a notification to email, specified in the clients' Billing Email field
	• Notify Admin	When clients' balance+credit is below the entered value, the system will send a notification to an administrator via Events Log
	• Threshold	Available balance threshold, below which the special capacity setting will be applied
	• Capacity	Origination capacity limit that will be applied when the available balance is below the threshold
Autoinvoicing checkbox	Activates/deactivates the automatic invoice generation feature for the current client. Information block parameters are:	
	• Template	Select an invoice template for this customer

	<ul style="list-style-type: none"> • Last Invoiced 	Specify the last date when the client was invoiced
Rate Notification checkbox	Here you can enable or disable automatic rates notifications for the current client	
	<ul style="list-style-type: none"> • Format 	Select the desirable format of rate notification (.xlsx or .csv)
	<ul style="list-style-type: none"> • Notify Type 	<p>Specify a type of notification:</p> <ul style="list-style-type: none"> • All rates - full rates list will be sent • Only changed rates - only changed rates will be sent • All rates (not repeated codes) - if there are two or more new rates with different effective dates for the same code, several files will be sent, each containing a full list of rates and only one unique rate for this code <div>  Tip <ol style="list-style-type: none"> 1. The system will push notification after adding new rates. Please note, if the user changes the Effective Date field of current rates manually, they will also be included in the notification. 2. When you <i>force</i> Rate Notification, it does not send all the rates with the Effective Date in the future but only the rates that it will be late to send with the next scheduled notification (according to the Agreement assigned to the Rate Table). If there's no Agreement, the Rate Notification <u>will not be sent</u>. 3. We recommend using forced notifications for testing purposes. It doesn't cancel a regular notification nor change the last export date. </div>
Company Info	Some additional information about a client can be entered here	
	<ul style="list-style-type: none"> • Name 	Company name
	<ul style="list-style-type: none"> • Main Email 	Company email for general inquiries. Use only Latin characters.
	<ul style="list-style-type: none"> • NOC Email 	Company email for technical related questions. Use only Latin characters.
	<ul style="list-style-type: none"> • Notify about Factors Watcher blocks checkbox 	This tool watches over different parameters and generates alerts if some conditions are met. This function is optional, i.e. you can enable or disable them in the Clients form
	<ul style="list-style-type: none"> • Billing Email 	Automatically generated invoices and notifications will be sent to this email address. Use only Latin characters.
	<ul style="list-style-type: none"> • Rates Email 	Company email for rates related questions. Use only Latin characters.
	<ul style="list-style-type: none"> • Address 	Physical company address
	<ul style="list-style-type: none"> • Zip Code 	Postal code for SureTax integration
	<ul style="list-style-type: none"> • Tax ID 	Customer's tax ID

• Reg ID	Customer's registration ID
• Account Details	Reference information about the client's bank account or payment details
• Locale	The preferred locale that will be sent as a reply to RADIUS Authorization. It is used for IVR platforms to define the language

⚠ Attention

Autoinvoicing tool sends rates in separate files for each time profile used in a certain Rate Table.

Please note, the **email address should contain only Latin characters** for proper work of email notifications and invoices.

⚠ Warning

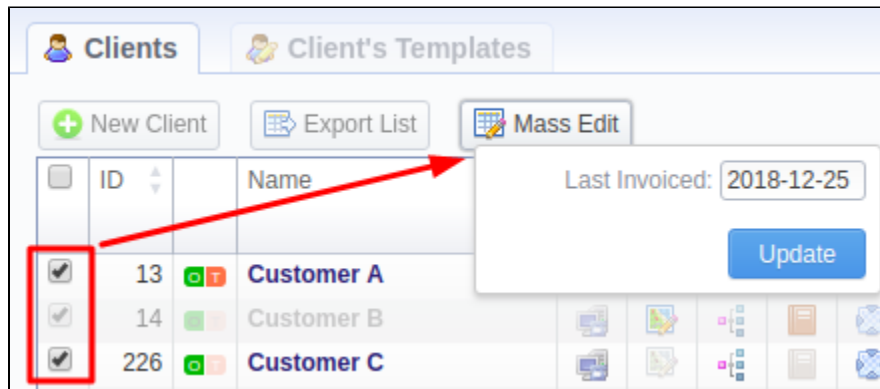
The **Full Delete** button can be used to remove a client from the system permanently, disregarding any statistics or rate tables data connections. Please use this feature with care – the deleted client cannot be restored by any means

Mass Edit

If there is a need to **change the last invoice date** (i.e. the day that the client has already been invoiced for) for more than one client, you can use **Mass Edit** functionality. Follow the next steps:

- Select target Clients;
- Click the **Mass Edit** button and specify the date in the **Last Invoiced** field;
- Click the **Update** button.

Screenshot: Mass edit functionality



Clients Templates

This section allows you to create a client template, where you can specify the main information about a client, originator settings, etc. Further, this template can be used to set the billing and tariff parameters for customers, managers, or resellers in several clicks. For more details, check out a related article: [Clients Templates](#).

Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty