Clients

In this article

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

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
New Client	Allows adding a new client to the system
Export List	Allows exporting a list of user's clients in a **.csv** file

Mass Edit	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.

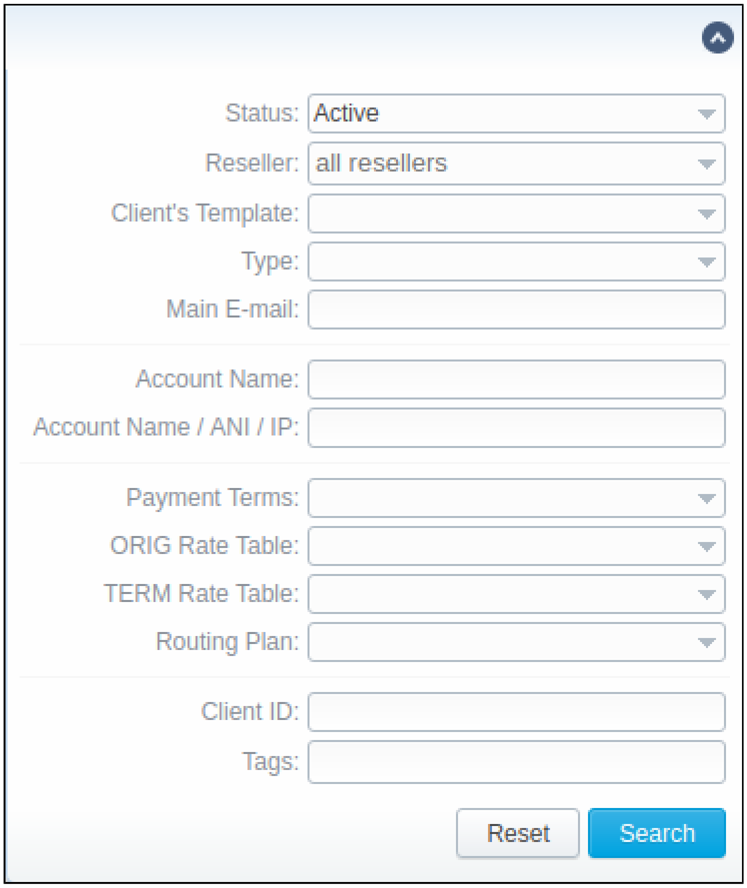
Helpful Tip

- 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

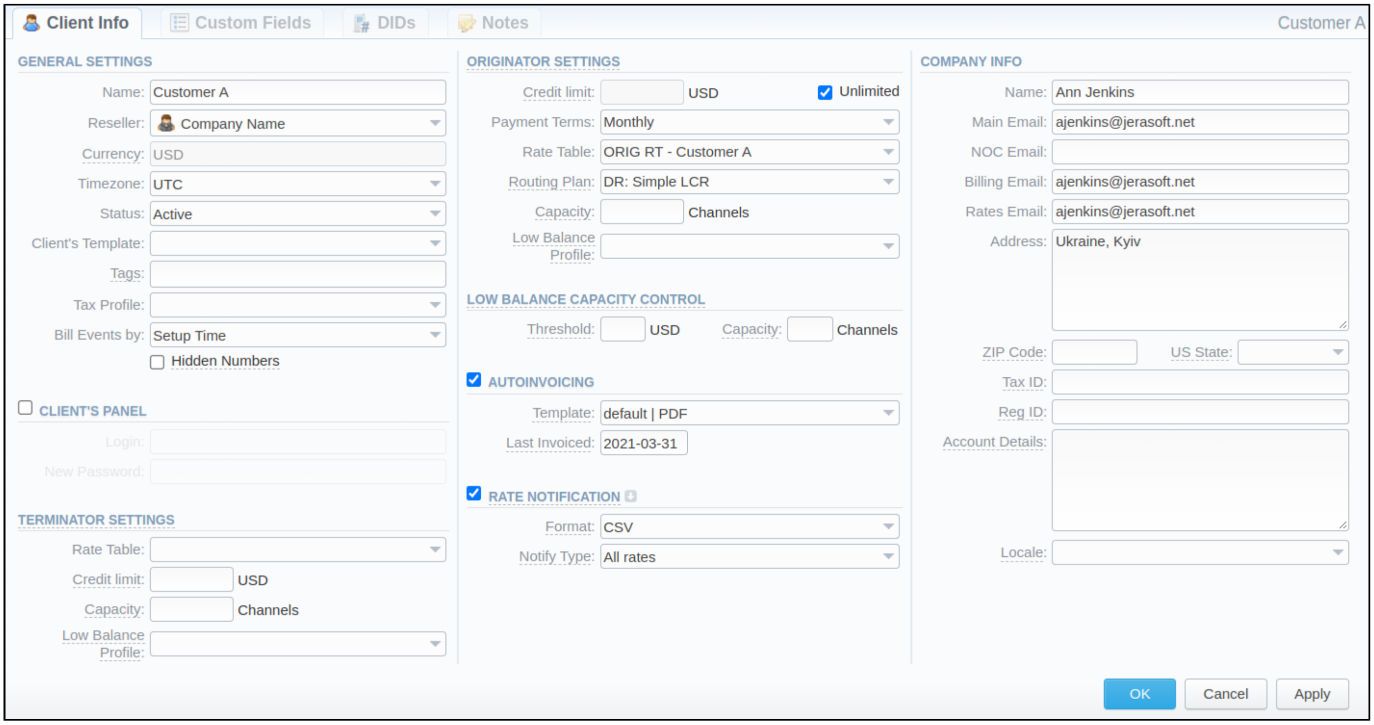


To apply the specified search criteria, click the **Search** button; to cancel the applied parameters, click **Reset**.

Adding New Client

To add a new customer in the system, click the **New Client** button in the top-left corner of the section. A pop-up window with the following fields will show up:

Screenshot: Adding a new client



Information block	Fields & Description	
General Settings	General information about the client	
	• ***Name***	Indicate a client's name
	• ***Reseller***	Select a reseller new client belongs to (this name will be used in invoices)
	• ***Currency***	Define preferred currency (will be used in invoices)
	• ***Timezone***	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 ⚠ **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.
	• ***Status***	Select a respective status for the client: • ***active*** • ***stop*** • ***deleted***
	• ***Client's Template***	Here you can apply the required template from the list to a new customer
	• ***Tags***	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.

	• ***Tax Profile***	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. There can be 3 types of the tax profiles used: • **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) **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.
	• ***Bill Events by***	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)
	• ***Hidden Numbers*** checkbox	When checked, allows you to hide some part of the client's destination numbers in invoices, xDRs reports and during export. **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.
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 *Accounts* 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
	• ***Low Balance Profile***	From the list of all available, select a Low Balance Profile for this client
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 the vendor's live balance + credit limit hits the entered threshold.
	• ***Capacity***	Define the termination capacity of channels for this client. For unlimited amount, leave empty
	• ***Low Balance Profile***	From the list of all available, select a Low Balance Profile for this client
Low Balance Capacity Control	Here you can set up whether the system should limit capacity or not when the client's **Available** balance is lower than a set threshold	
	• ***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
	• ***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	
	• ***Format***	Select the desirable format of rate notification (**.xlsx** or **.csv**)

	• ***Notify Type***	Specify a type of notification: • ***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 **Tip** 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 *force* 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 will not be sent. 3. We recommend using forced notifications for testing purposes. It doesn't cancel a regular notification nor change the last export date.
Company Info	Some additional information about a client can be entered here	
	• ***Name***	Company name
	• ***Main Email***	Company email for general inquiries. Use only Latin characters.
	• ***NOC Email***	Company email for technical related questions. Use only Latin characters.
	• ***Billing Email***	Automatically generated invoices and notifications will be sent to this email address. Use only Latin characters.
	• ***Rates Email***	Company email for rates related questions. Use only Latin characters.
	• ***Address***	Physical company address
	• ***Zip Code***	Postal code for SureTax integration
	• ***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

Useful Tip

You can use multiple emails per field if necessary. Just separate them with a comma or semicolon.

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

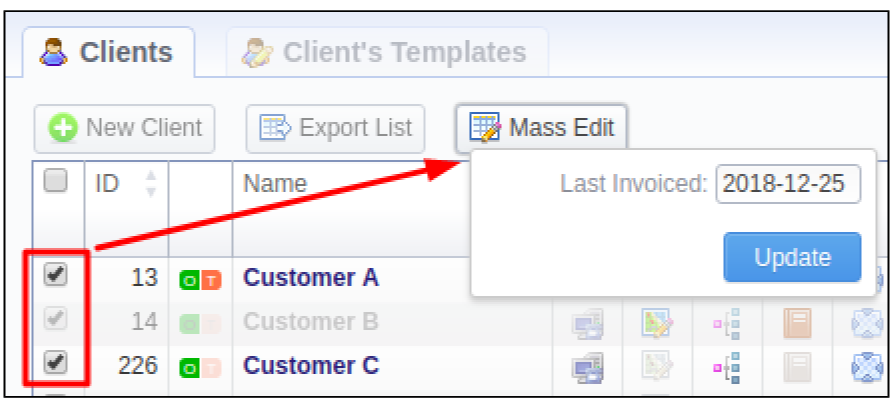
The **Full Delete** button can be used to remove a client from the system permanently, disregarding any statistics or rate tables data connections. Please use this feature with care – the deleted client cannot be restored by any means

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