

Resellers

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Section overview

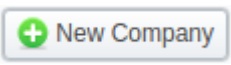







Reseller in JeraSoft Billing, in the majority of cases, is a company that has a certain number of [clients](#) and governs their activities in the system. Like any company, it can have a range of managers, each responsible for a certain group of company clients. The **Manager** has limited functionality: doesn't have his own balance, therefore, he cannot perform any transactions; neither origination nor termination rate table cannot be assigned to him, etc. The **Resellers** section is designed to provide a user with a possibility to **track and manage their company information and activity, build a hierarchy of company affiliates, or assign its managers**. The section is presented in the form of a table with the following columns:

Screenshot: Resellers section

Resellers									
+ New Company		+ New Manager							
				Rows 1 – 4 of 4					
ID	Name					Available Balance	Clients		
3	Company Name					No Limit USD	9		
22	Accounting Manager						0		
21	Rates Manager						0		
20	Sub-company					0.00 USD	0		

Column name	Description
ID	Reseller's/Manager's identification number
Name	Name of a reseller/manager
Available Balance	Reseller's available balance (live balance + credit)
Clients	The total amount of a respective reseller's/manager's clients

The following functional buttons and icons are present in the section:

Button/Icon	Description
	Allows creating a new reseller
	Allows creating a new manager
	Allows assigning an origination rate table to a respective reseller
	Allows assigning a termination rate table to a respective reseller
	Allows viewing a list of a following reseller's/manager's users
	Allows viewing history of changes for a respective reseller/manager in the Audit log section
	Allows viewing reseller's balance operations in the Transactions section
	Allows viewing a list of reseller's/manager's clients in the Clients section

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

Mode: Normal Mode

Reset

Search

Field	Description
Mode	Select a mode for the resellers' display: To apply the specified search criteria, click the Search button; to cancel the applied parameters, click Reset . <ul style="list-style-type: none">Normal Mode - only resellers with Active status will be displayedArchive Mode - all resellers regardless of the status will be displayed

Adding a New Reseller

To add a company, you need to:

- click the **New Company** button;
- fill in all the required fields in the appeared pop-up window (see below) and click **OK**.

Screenshot: Adding a new company

Edit Reseller

Custom Fields

Rates Notifications

Autocharge Settings

Company Name

SYSTEM INFORMATION

ORIGINATOR SETTINGS

CONTACT INFORMATION

TERMINATOR SETTINGS

INVOICING INFORMATION

COMPANY LOGO

MAIL TEMPLATE: INVOICE

MAIL TEMPLATE: INVOICE UNPAID REMINDER

MAIL TEMPLATE: OVERDUE REMINDER

MAIL TEMPLATE: LOW BALANCE NOTIFICATION

MAIL TEMPLATE: RATES NOTIFICATOR

MAIL TEMPLATE: REPORTS MONITORING - EXTERNAL

MAIL TEMPLATE: REPORTS MONITORING - INTERNAL

MAIL TEMPLATE: REPORTS TO EMAIL

MAIL TEMPLATE: PAYMENT CONFIRMATION



Full Delete

OK

Cancel

Apply

Information block	Fields Description
System Information	General information about a company
	<ul style="list-style-type: none">Name Specify the name of one of your companies (or affiliates). This field is mandatory.

	<ul style="list-style-type: none"> • Parent <p>Indicate a parent for a reseller or make it a root one. By default, the field value is set to root</p>
	<ul style="list-style-type: none"> • Currency <p>Select a preferred currency for rates and invoices from the drop-down list of all available ones (see the Currencies section)</p>
	<ul style="list-style-type: none"> • Status <p>Define the status of a reseller:</p> <ul style="list-style-type: none"> • Active • Deleted
	<ul style="list-style-type: none"> • Client's Template <p>Select a template that will be used for all clients belonging to this reseller or manager by default (see the Clients Template section)</p>
	<ul style="list-style-type: none"> • Tax Profile <p>Indicate a tax profile that will be used for this reseller and reflected in invoices (refers to the Taxes Profiles section).</p> <ul style="list-style-type: none"> • SureTax and Compliance are tax calculation services, which allow managing your compliance with tax law. These profiles are used for further calculation in invoices. To get more details, check out the US Taxation article. <div>  Attention <p>For proper usage of SureTax and Compliance, 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.</p> </div>
	<ul style="list-style-type: none"> • Gateways <p>Select gateway(s) for this reseller</p>
	<ul style="list-style-type: none"> • SMTP Credentials <p>Select SMTP Credentials for this Reseller. Credentials are managed in the Data Sources section</p>
Terminator Settings	Reseller's billing settings for outgoing calls
	<ul style="list-style-type: none"> • TERM Rates <p>Rates for outgoing events from customers under a current reseller. Enables resellers billing mode</p> <div>  Tip <p>For more information about resellers billing mode, address this article</p> </div>
	<ul style="list-style-type: none"> • TERM Capacity <p>Termination capacity for all clients, belonging to this reseller. Leave this field empty for unlimited capacity</p>
Origination Settings	Current Reseller's billing settings for incoming calls
	<ul style="list-style-type: none"> • Unlimited checkbox <p>Here you can set a specific payment mode for a client. Unlimited mode means that a client will have unlimited credit. Otherwise, the client's Balance + Credit value will be checked on RADIUS or SIP authorization. When this field is checked, the Credit limit field becomes unavailable.</p>

	<ul style="list-style-type: none"> • Credit limit 	The additional field next to the Unlimited checkbox. User can indicate an amount of reseller's credit
	<ul style="list-style-type: none"> • ORIG Rates 	Specify rates for incoming events from customers under a current reseller. Enables resellers billing mode
	<ul style="list-style-type: none"> • ORIG Capacity 	Indicate origination capacity for all clients, belonging to this reseller. Leave this field empty for unlimited capacity
Invoicing Information	Current Reseller's invoicing settings	
	<ul style="list-style-type: none"> • Date 	<p>Allows you to select how the system sets an invoicing date:</p> <ul style="list-style-type: none"> • Real date – sets an invoicing date to actual invoicing date • Last day – sets an invoicing date to date of last day of invoicing period
	<ul style="list-style-type: none"> • Template 	Select an invoice template that will be assigned to a reseller
	<ul style="list-style-type: none"> • No Tpl 	Allows to define a default format of invoice's name
	<ul style="list-style-type: none"> • Last No 	Define the last used invoice number
Contact Information	Some additional information	
	<ul style="list-style-type: none"> • Email 	Company's email (it is required to specify an email to receive notifications). Use only Latin characters. This field is mandatory
	<ul style="list-style-type: none"> • Postal Address 	Company's postal address
	<ul style="list-style-type: none"> • Tax ID 	An ID of the tax-paying entity
	<ul style="list-style-type: none"> • Reg ID 	Company's registration ID
Company Logo	<ul style="list-style-type: none"> • Bank Account 	Company's bank account info
	<p>Here you can add a file with a company's logo. To delete the company logo, open the edit form of a respective Reseller with a logo, then click the delete icon to remove the old logo.</p>	

Mail Templates	A detailed description of all Mail Templates and their configuration is presented at the end of the article
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Useful Tip

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




Attention

- Changes in Resellers' settings will not be applied instantly. They will be automatically reloaded at the next run of the **Cache Manager** service.
- **Parent Reseller has access to all information of its Sub-Resellers**, and also can assign **any routing plan and rate table** to its Sub-Resellers.

Adding a New Manager


To add a manager, click the **New Manager** button. After specifying the required fields, click **OK**.

Screenshot: Adding a new manager

 **Resellers**

SYSTEM INFORMATION

Name:

Parent:  Reseller 1

Status: Active

Client's Template:

CONTACT INFORMATION

E-mail:

Postal Address:

Information block	Fields Description	
System Information	General information about a Manager	
	• Name	Here you can specify the name of a manager. This field is mandatory.
	• Parent	Select a parent for a manager
	• Status	Select the current status of a manager: <ul style="list-style-type: none"> • Active • Deleted
Contact Information	Some additional information	

• Email	Manager's email. Use only Latin characters.
• Postal Address	Manager's postal address

Reseller Removal

To delete a Reseller/Manager from the system, you need to **change the status** from **Active** to **Deleted** in the Reseller's/Manager's profile editing form.

Screenshot: Editing reseller's status

The screenshot shows the 'Manager 1' profile editing form. The 'Status' dropdown menu is open, showing 'Active' and 'Deleted' options. A red arrow points to the 'Deleted' option. The 'Full Delete' button is highlighted with a red box.

Please note that, in fact, a Reseller/Manager **will not be deleted fully**; it will be **archived**. To display them, use **Advance Search** (see above). To delete a profile completely, you need to click **Full Delete** in this editing window.

Custom Fields

- **Custom Fields** are used as custom variables that will be represented as readable text in invoice templates. A Custom Field allows adding information about a client.
- **Custom Package Fields** are also used as custom variables that allow adding information about a package.

To add a new field, follow these steps:

1. Click the **Add Custom Field** button.
2. Specify the **Field Key** and **Title** fields for a custom item. For example, **voip_phone_sell** as Key and **VoIP Phone** as common Title, which will be visible for all clients. Please note that the **Field Key must contain word characters only**.
3. Add respective notes to the **VoIP Phone** field in the **Client's settings/Package settings > Custom Fields** tab.
4. Create an invoice template and assign it to a target reseller. Then, the **Clients Custom Fields** and **Package Custom Fields** tables will appear in the **Invoice Template** settings. You simply need to add those tables to the invoice template.
5. Finally, you can generate an invoice.

Screenshot: Custom Fields

Edit Reseller

Custom Fields

Rates Notifications

Reseller 1

CUSTOM FIELDS

+ Add Custom Field

Field Key	Title	
voip_phone_sell	VoIP Phone	

CUSTOM PACKAGE FIELDS

+ Add Custom Field

Field Key	Title	

OK

Cancel

Apply

Rates Notifications

Rates Notification settings in the **Resellers** profile allow creating a **default rate notification** for the clients that belong to a target reseller.

Screenshot: Rates Notifications

Edit Reseller

Custom Fields

Rates Notifications

Autocharge Settings

Company Name

TEMPLATE SETTINGS

Output format: CSV

Fields Delimiter: ,

With headers row: Enabled

Export Columns: Code x Code Name x Rate x

Code Deck:

Codes from code deck: Disabled

Codes Output: separate rows

Date Format: %m/%d/%Y %H:%M:%S %z

Billing Increment: Grace Volume x Int x Min x

HEADER/FOOTER TEXT

Header text

Footer text

OK

Cancel


Apply

To configure these settings, open the **Rate Notifications** tab in the reseller profile. The structure of a tab is as follows:

Field	Description
Output format	
Fields Delimiter	Set a delimiter for the fields if you've chosen .csv . For .xls format, this field is unavailable
With headers row	Include a row with column names in a file
Export Columns	Select the columns to export
Code Deck	Select a code deck here to rewrite code names in an export file if needed
Codes from code deck checkbox	Include only codes, which are present in a specified Code Deck
Codes Output	Select a way codes must be displayed
	<ul style="list-style-type: none"> Separate Rows <div>Each code is placed into a single row</div> Delimited List <div>Codes are grouped by a code name in a row. For example, 5510, 5511, 5512</div>

	<ul style="list-style-type: none"> • Ranges List 	Codes are grouped by a code name into ranges plus delimiter. For example, 5510-5512, 5515
Date Format	Specify the date format in your export file. Example of the field syntax: if you enter “%d-%m-%Y” here, your date will look like 25-02-2018	
Header Text/Footer Text	Allows to specify additional text into an exported file as a header and footer, respectively	

Description of all columns that could be selected for a rate notification is provided below:

 Note that the first selected column will be the one used for sorting the rates list.

Column Name	Description					
Code / Code Name	Code or Code Name of a respective rate					
Effective Date	Date, on which a rate to be applied					
Rate	Price					
Min Volume	The minimum volume of chargeable events					
Interval	Chargeable interval					
Grace Volume	Free of charge interval					
Setup Fee	Interval of a setup fee					
Profile	Time profile (<i>all time, business time, non-business time, weekends</i>)					
End Date	Date, on which the rate ends					
Previous Rate	Rate used before the present time					
Prev Diff	Shows how current rate differs from a previous one after import					
Prev Diff Status	Shows how the current rate's status changed in comparison to a previous one (unchanged, increased, decreased)					
Prev Diff (export)	Shows how the current rate differs from a previous one after export					
Prev Diff Status (export)	Rate's changes after the last export. Shows the status of how the current rate differs from a previous one. The rate will have an unchanged status if the Effective date is lower than the Last Notification Date					
Step 1: Notification type: All rates unique mode - First Notification: 07/07/2017						
Code	Rate	Effective From	Previous Rate	Prev Diff	Prev Diff Status	Prev Diff Status (export)
1	10	07/01/2017 00:00:00 +0000	-	-	new	unchanged
2	10	07/01/2017 00:00:00 +0000	-	-	new	unchanged
3	10	07/01/2017 00:00:00 +0000	-	-	new	unchanged
Step 2: Added new rates with effective date 07/21/2017 - Second Notification: 07/14/2017						
Code	Rate	Effective From	Previous Rate	Prev Diff	Prev Diff Status	Prev Diff Status (export)
1	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
2	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
3	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
Step 3: Rate with code 1 was edited and the increase was canceled - Third Notification: 07/21/2017						
Code	Rate	Effective From	Previous Rate	Prev Diff	Prev Diff Status	Prev Diff Status (export)
1	10	07/21/2017 00:00:00 +0000	10	0	unchanged	unchanged
2	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
3	15	07/21/2017 00:00:00 +0000	10	5	increased	increased (5.0000)
Step 4: Rate with code 2 was edited and added a new rate for code 3 - Fourth Notification: 07/28/2017						
Code	Rate	Effective From	Previous Rate	Prev Diff	Prev Diff Status	Prev Diff Status (export)
1	10	07/21/2017 00:00:00 +0000	10	0	unchanged	unchanged
2	20	07/21/2017 00:00:00 +0000	10	10	increased	unchanged
3	20	07/31/2017 00:00:00 +0000	15	5	increased	increased (5.0000)
Notes	Additional information					
Tag	Tags that are assigned to a respective rate					
Policy	Indicated policy of the rate					
Status	Define a current rate status					

Autocharge Settings

Autocharge Settings in the **Resellers** profile allow configuring the settings for Authorize.net or USAePay payment gateways. These settings will be true for all the clients under the respective Reseller.

Screenshot: Autocharge Settings

Edit ResellerCustom FieldsRates NotificationsAutocharge SettingsCompany A

AUTHORIZE.NET

Login: testAPI login ID

Transaction Key: *****API transaction key

Gateway Currency: U.S. Dollar (USD)Currency which will be used by user to perform a payment

System Currency: USDAmount received will be treated as a specified currency

Payment Account: GeneralSpecify account which will be used for transactions from this Payment System

☒ USAEPAY

API Key:API Key added in the USAePay merchant console

API PIN:API PIN to the API Key. If you don't have it, use USAePay merchant console to generate it.

System Currency: USDAmount received will be treated as a specified currency

Payment Account: GeneralSpecify account which will be used for transactions from this Payment System

OKCancelApply

To configure these settings, open the **Autocharge Settings** tab in the reseller profile. The structure of a tab is as follows:


Field	Description
Authorize.Net	
Login	API login
Transaction Key	API transaction key
Gateway Currency	A currency declared by the Payment Gateway
System Currency	Default JeraSoft Billing system currency
Payment Account	Payment Account name
USAePay	
API Key	API key
API PIN	API PIN to the API key
System Currency	Default JeraSoft Billing system currency
Payment Account	Payment Account name

Configuring Mail Templates

Also, there are different mail templates you can configure in your company's profile:

Screenshot: Mail Templates

📧 MAIL TEMPLATE: INVOICE
📧 MAIL TEMPLATE: INVOICE UNPAID REMINDER
📧 MAIL TEMPLATE: OVERDUE REMINDER
📧 MAIL TEMPLATE: LOW BALANCE NOTIFICATION
📧 MAIL TEMPLATE: RATES NOTIFICATOR
📧 MAIL TEMPLATE: REPORTS MONITORING - EXTERNAL
📧 MAIL TEMPLATE: REPORTS MONITORING - INTERNAL
📧 MAIL TEMPLATE: REPORTS TO EMAIL
📧 MAIL TEMPLATE: PAYMENT CONFIRMATION

Template Name	Description
Mail Template: Invoice	Used when sending an invoice to the customer
Mail Template: Invoice Unpaid Reminder	Used when sending a payment notification to a customer (sending notification on <i>"Notify Days (before)"</i>)
Mail Template: Overdue Reminder	Used when sending a payment notification to a customer (sending notification on <i>"Notify Days (after)"</i>)
Mail Template: Low Balance Notification	<p>Used when sending a low balance notification to a customer</p> <div>  Tip You can add a rounding rule for a client's balance during low balance notification. For example, to round up to 2 decimal places, you need to add the variable <code>\$(client["balance"])</code> in the Mail template: Low Balance Notification in reseller's settings and specify the number of rounding decimals in the Totals Precision field of the Currencies section. </div>
Mail Template: Rates Notificator	Used when sending a rate changes notification to a customer
Mail Template: Reports Monitoring - External	Used when the system matches client's destinations and sends notifications to them during Reports Monitoring
Mail Template: Reports Monitoring - Internal	Used when the system sends notifications about matched statistics during Reports Monitoring
Mail Template: Reports To Email	Used when sending reports by email
Mail Template: Payment Confirmation	Used when sending a payment confirmation email to the client

All mail templates have the following structure:

Screenshot: Reseller/Mail Template: Invoice

MAIL TEMPLATE: INVOICE

From:

"\${company['name']}" <\${company['c_email']}>

BCC:

Subject:

Invoice from \${company['name']} for \${invoice['period_start']} - \${invoice['period_finish']}

Greetings,

This is invoice \${invoice['no']} for \${invoice['period_start']} - \${invoice['period_finish']}.

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Autogenerated by billing system

\${company['name']}

\${company['c_email']}

Field	Description
From	Specify a name and email of a company
BCC	Specify who will receive a blind copy of an email
Subject	Indicate an email subject that may contain the company name, invoice number, etc.
Mail Body	Content of the letter with the template-specific variables.

To configure any of these templates, simply click on its name. Below, you will find a full list of templates configuration syntax used in almost all kinds of configured mails concerning Clients' and Resellers' data and configuration syntax, which is used in a foregoing list of mail templates.

Configuration Syntax

General Configuration Syntax Concerning Clients' Data

Templates Configuration Syntax	Description
<code>\${client['status']}</code>	Client's status: <ul style="list-style-type: none">• Active• Deleted
<code>\${client['name']}</code>	Client's name
<code>\${client['balance']}</code>	Client's live balance
<code>\${client['balance_accountant']}</code>	Client's fixed balance
<code>\${client['credit']}</code>	Client's available credit
<code>\${client['c_company']}</code>	Client's official company name
<code>\${client['c_address']}</code>	Post address of a client's company
<code>\${client['c_email']}</code>	Client's email
<code>\${client['locale']}</code>	Client's location
<code>\${client['currencies_id']}</code>	Currency ID, used by a client
<code>\${client['tz']}</code>	Timezone of a client
<code>\${client['taxes_profiles_id']}</code>	Taxes profile's ID, used by a client
<code>\${client['tax_id']}</code>	Customers tax ID of a client's company
<code>\${client['reg_id']}</code>	Registration ID of a client's company

General Configuration Syntax Concerning Company's/Reseller's Data

Templates Configuration Syntax	Description
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<code>\${company['status']}</code>	Company's status: <ul style="list-style-type: none"> • Active • Deleted
<code>\${company['balance']}</code>	Company's current balance
<code>\${company['balance_accountant']}</code>	Company's fixed balance
<code>\${company['credit']}</code>	Company's available credit
<code>\${company['c_address']}</code>	Company's postal address
<code>\${company['c_email']}</code>	Email of a company
<code>\${company['locale']}</code>	Company's location
<code>\${company['currencies_id']}</code>	Company's currency ID
<code>\${company['tz']}</code>	Company's timezone
<code>\${company['taxes_profiles_id']}</code>	Company's taxes profiles
<code>\${company['name']}</code>	Name of a company
<code>\${company['tax_id']}</code>	Company's customers tax ID
<code>\${company['reg_id']}</code>	Company's registration ID

Configuration Syntax for Mail Template: Invoice and Payment Reminder Notification

Templates Configuration Syntax	Description
<code>\${invoice['c_dt']}</code>	Invoice date
<code>\${invoice['type']}</code>	Invoice type
<code>\${invoice['amount']}</code>	Invoice total sum
<code>\${invoice['period_start']}</code>	Invoice period start
<code>\${invoice['period_finish']}</code>	Invoice period end
<code>\${invoice['due_date']}</code>	Invoice due date
<code>\${invoice['no']}</code>	Invoice number
<code>\${invoice['descr']}</code>	Invoice comments
<code>\${invoice['tz']}</code>	Invoice timezone
<code>\${invoice['state']}</code>	Invoice state
<code>\${invoice['name']}</code>	Invoiced client's name
<code>\${client['currency']}</code>	Client's currency

Configuration Syntax for Mail Template: Low Balance Notification

Templates Configuration Syntax	Description
<code>\${client['balance_avail']}</code>	Client's available balance: live balance + credit
<code>\${client['currency']}</code>	Client's currency
<code>\${client['alert_threshold']}</code>	Notification for a client regarding reaching a balance limit
<code>\${client['alert_athreshold']}</code>	Notification for an administrator regarding reaching a balance limit

Configuration Syntax for Mail Template: Rates Notificator

Templates Configuration Syntax	Description
<code>\${msg['rt_name']}</code>	Rate table name
<code>\${msg['lastedit_dt']}</code>	Date when a rate table was edited last

<code>\${date}</code>	Date when the notification was sent
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Configuration Syntax for Mail Template: Reports To Email

Templates Configuration Syntax	Description
<code>\${report["name"]}</code>	Title of a report template
<code>\${report["interval"]}</code>	Actual report period
<code>\${report["name-full"]}</code>	Title of a report template with indication of an actual report period
<code>\${report["id"]}</code>	ID of a report template



Tip

If you want the date of sending a letter to be present, you can add the **`${date}`** variable in any mail template.

Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty