Client Packages

Section overview

This section is designed to provide a vide variety of fucntions to control and manage clients' packages. First and foremost, in this section user can assign relevant package to a respective client or client's account, edit and cancel it, ect. Moreover, there is a detailed information regarding all the limits that have been used over a set period. Section is presented in a form of a table with the following columns (see screenshot below):

Screenshot: Client Packages list

Column	Description
ID	Package identification number
Client	Name of client whom package is assigned to
Account	Name of account whom package is assigned to
Package	Name of assigned package
Limits	Shows, if respective package has some volume limits and time or money left 1. On the left side of the bar it shows the **destinations**, **code** or **code names**. 2. On the right side of the bar it shows a **specified limit**.
Current period start/stop	A date of package's activation for respective client/account A date of package's deactivation for respective client/account
Package start/stop	Effective start and stop date of the package
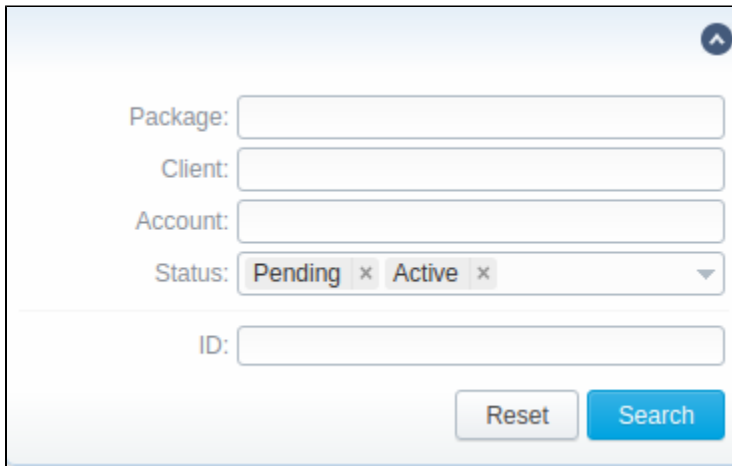
Button/Icon	Description
Assign Package	Allows assigning a package to corresponding client/account
⊠	Shows the full list of packages that were assigned to this client/account
? Unknown Attachment	Marks package, that was successfully activated and will renew itself due to the package settings
? Unknown Attachment	Marks package, that is new for current user and not activated yet
? Unknown Attachment	Marks package, that is in the archive
✎	Allows editing client's package
blocked URL	Allows a user to stop the package at the beginning of the current period (with balance rollback).

(icon)	Allows a user to stop the package at the end of the current period.
(red square icon)	Cancels the active package
(orange X icon)	Removes assigned package completely

Advanced Search

By default, information in a section is filtered by **Pending** and **Active** statuses. To open **Advanced Search** drop-down menu, click on red downwards arrow icon and fill in the following fields with required information:

Screenshot: Advanced Search drop-down menu

Field	Description
Package	Indicate a name of a target package
Client	Specify a target client
Account	Specify a client's target account
Status	Select a status of a client's package: • **Pending** • **Active** • **Archive**
ID	Specify respective client's package ID

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

Assigning New Package

Click **Assign Package** button for a new pop-up window with settings to appear. Then, fill in the form and click **Apply** button. You can assign any number of packages. They will be activated when **Package Manager** service runs, and if a customer has enough balance for activation+subscription fees.

Screenshot: Client Packages form

Field	Description
Client	Name of lient whom package is assigned to
Account	Name of account whom package is assigned to
Package	Name of assigned package
Start Date	Package's limits and discounts are only effective after specified date
End Date	Package's limits and discounts are disabled after specified date
Quantity	Number of packages to be assigned.
Activate in the past checkbox	If checked and Start Date field value is in the past, package will be activated on the specified date

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🛑 **Warning**

If you click the delete blocked URL icon (**remove an archived package entirely**) in the **Client Packages** section, you will delete a package with all transactions from the system.

To delete the package completely you need to do the following:

- press ⬛ icon opposite a respective package on the section list
- filter the list of packages by **Archive** status
- find a respective package and click blocked URL icon to delete it entirely from the system.

Editing Clients Package

When clicking on edit ✏️ icon, a detailed information on client's package is displayed. In **System information** data block, user can view general info regarding the package including client himself, start date, status and so on. What is more emportant, user can change package's **End date** in a respective field.

To make it easier for a user to keep records of package limits, a new **Limits History** information block on an **Edit Client's Package** (see screenshot below) page has been introduced in **VCS 3.15.0**. It provides a detailed view of package limits for each specified period.

Screenshot: Limits History information block

Client Packages

SYSTEM INFORMATION

Client: 👤 **Orig Client**

Account: All Accounts

Package: **Test Package with volume and credit limits**

Start date: 10/01/2017 00:00:00 +0000

End date: [ ]

Status: **Active**

Charge on Event: No

Charged: Yes

Reactivations: **4**

Align to Payment Terms: No

Recalculate to Period: No

LIMITS HISTORY

Rows **1 – 4** of **4**   📅 20 ▾   « ‹   Page 1 of 1   › »

	Limits	Current period start	Current period stop
🟢	380 ▬▬▬▬▬▬▬ 100.0000 USD 38044 ▬ 100.00 min	01/01/2018 00:00:00	02/01/2018 00:00:00
◯	380 ▬▬▬▬ 100.0000 USD 38044 ▬▬▬ 100.00 min	12/01/2017 00:00:00	01/01/2018 00:00:00
◯	380 ▬▬▬▬ 100.0000 USD 38044 ▬▬▬▬ 100.00 min	11/01/2017 00:00:00	12/01/2017 00:00:00
◯	380 ▬▬ 100.0000 USD 38044 ▬ 100.00 min	10/01/2017 00:00:00	11/01/2017 00:00:00

[OK] [Cancel] [Apply]

⚠ **Attention**

When you change the **name of the package** in the **Retail > Packages**, it will be automatically changed it in **Management > Client Packages** section as well, even if this package is already assigned. As a result, in **Invoices** and **Transactions** sections, an **old** name of the package will be specified. **We do not recommend to edit the name of already assigned package in the** *Retail > Packages.*