Client Packages

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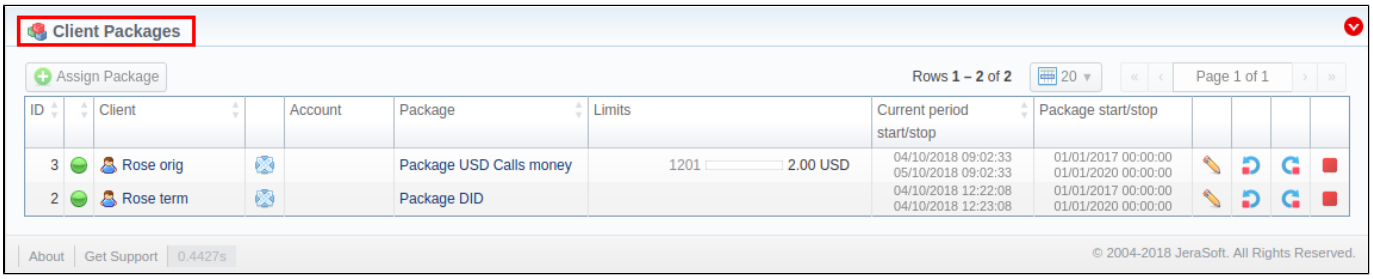
Section overview

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

Screenshot: Client Packages list



Column	Description
ID	Package identification number
Client	Name of a client, to whom a package is assigned
Account	Name of an account, to whom a package is assigned
Package	Name of an assigned package
Limits	Shows if a 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 a respective client/account A date of package's deactivation for a respective client/account
Package Start/Stop	Effective start and stop date of the package

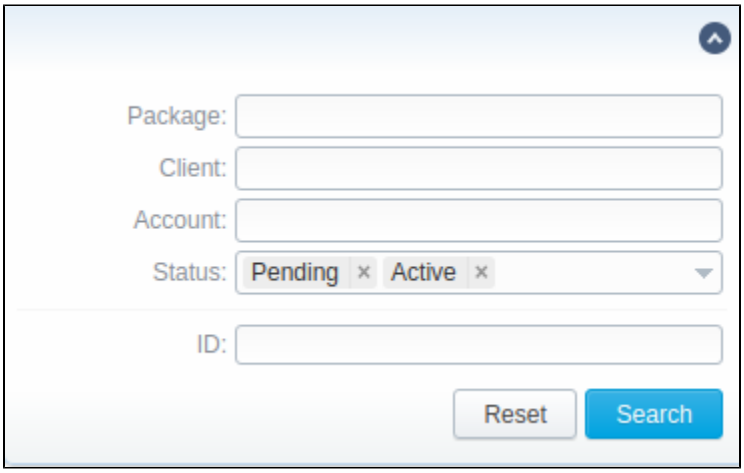
Button/Icon	Description
Assign Package	Allows assigning a package to a corresponding client/account
	Shows the full list of packages that were assigned to this client/account
Unknown Attachment	Marks a package that was successfully activated and will renew itself due to the package settings
Unknown Attachment	Marks a package that is new for a current user and was not activated yet
Unknown Attachment	Marks a package that is in the archive
	Allows editing a client's package
blocked URL	Allows a user to stop the package at the beginning of the current period (with balance rollback).

	Allows a user to stop the package at the end of the current period.
	Cancels the active package
	Removes an assigned package completely

Advanced Search

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

Screenshot: Advanced Search drop-down menu



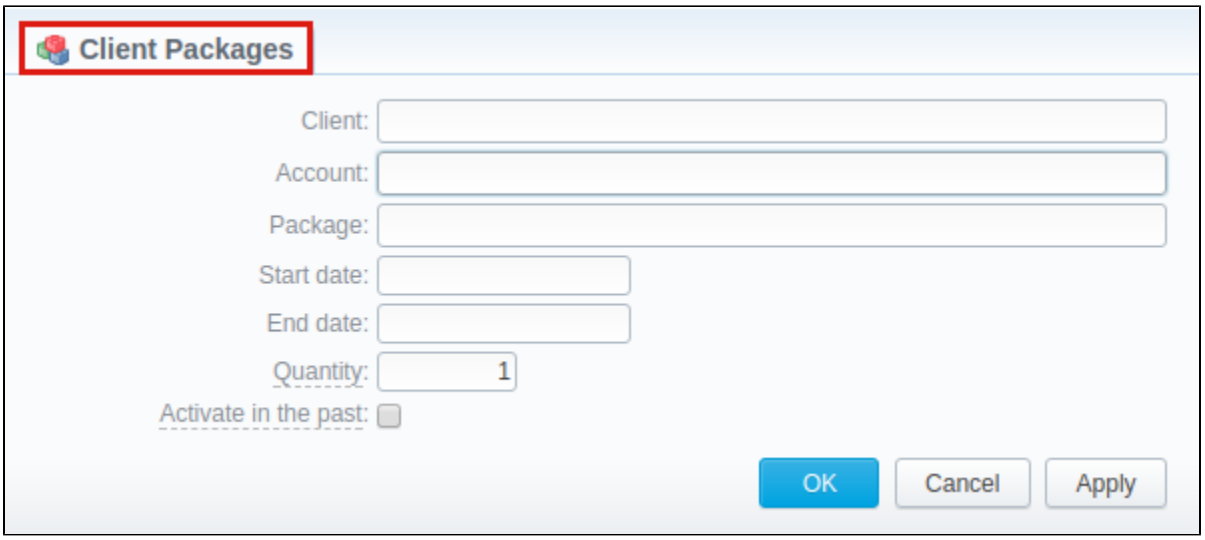
Field	Description
Package	Indicate the name of a target package
Client	Specify a target client
Account	Specify a client's target account
Status	Select the status of a client's package: • ***Pending*** • ***Active*** • ***Archive***
ID	Specify a respective client's package ID

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

Assigning a New Package

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

Screenshot: Client Packages form



Field	Description
Client	Name of a client, to whom a package is assigned
Account	Name of an account, to whom a package is assigned
Package	Name of an assigned package
Start Date	Package's limits and discounts are only effective after a specified date
End Date	Package's limits and discounts are disabled after a specified date
Quantity	Number of packages to be assigned
Activate in the past checkbox	If checked and the Start Date field value is in the past, a package will be activated on the specified date **Attention** If you assign a package in the past using this option, and the package has limits, for the statistics to be recalculated using these limits, you need to re-rate the client for the period in which the package was assigned.

Helpful Tip

Sometimes it happens that the next activation period of the package is created later than expected (when the start date of the period has already passed, i.e., due to the client's low balance). In that case, for the statistics from the beginning of the period until the actual reactivation of the package to be recalculated according to the package limits, you'll need to re-rate the client for this period.

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:

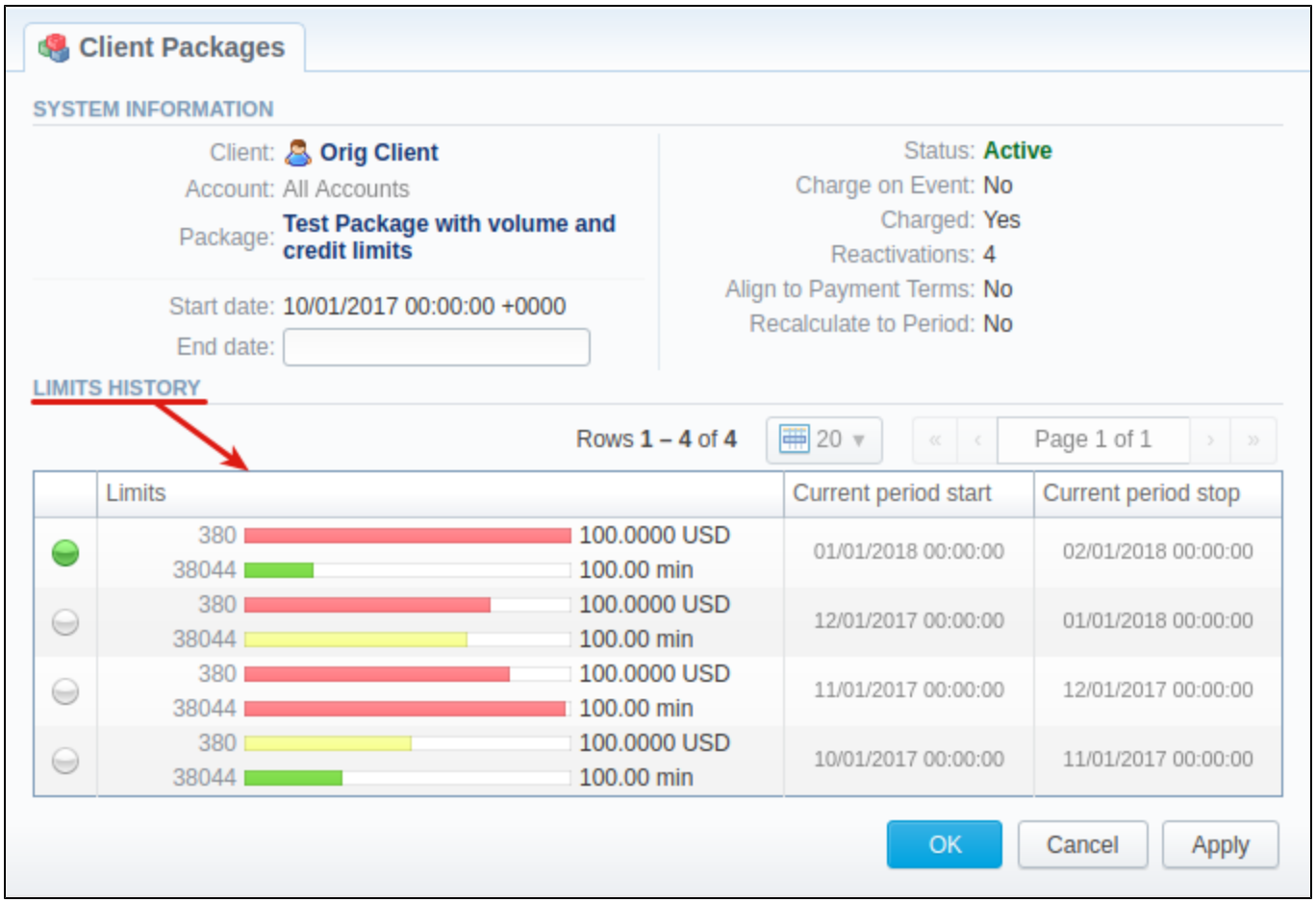
- click the icon opposite a respective package on the section list;
- filter the list of packages by the **Archive** status;
- find a respective package and click the blocked URL icon to delete it entirely from the system.

Editing a Clients Package

When clicking on the edit icon, detailed information on a client's package is displayed. In the **System information** data block, a user can view general info regarding the package including a client himself, start date, status, etc. What is more important, a user can change the 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** 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



Attention

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