

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*

Client Packages									
+ Assign Package		Rows 1 – 2 of 2		20		Page 1 of 1			
ID	Client	Account	Package	Limits	Current period start/stop	Package start/stop			
3	Rose orig		Package USD Calls money	1201 2.00 USD	04/10/2018 09:02:33 05/10/2018 09:02:33	01/01/2017 00:00:00 01/01/2020 00:00:00			
2	Rose term		Package DID		04/10/2018 12:22:08 04/10/2018 12:23:08	01/01/2017 00:00:00 01/01/2020 00:00:00			

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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

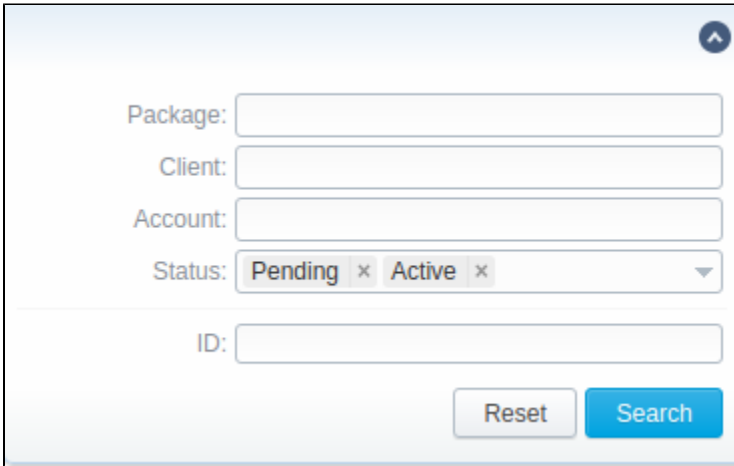
Button/Icon	Description
+ Assign Package	Allows assigning a package to a corresponding client/account
	Shows the full list of packages that were assigned to this client/account
? Unknown Attachment	Marks a package that was successfully activated and will renew itself due to the package settings
? Unknown 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


Client Packages

Client:
Account:
Package:
Start date:
End date:
Quantity:
Activate in the past: ☐

OK Cancel Apply

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

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

Client Packages

SYSTEM INFORMATION

Client: **Orig Client**
Account: All Accounts
Package: **Test Package with volume and credit limits**

Status: **Active**
Charge on Event: **No**
Charged: **Yes**
Reactivations: **4**
Align to Payment Terms: **No**
Recalculate to Period: **No**

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

LIMITS HISTORY

Rows 1 – 4 of 4

20 ▼

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	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 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.**