

Packages

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Section overview

The Packages section helps to add and manage any one-time or regular supplementary services that your company may provide in addition to VoIP. For example, you can create a package with rent of some equipment or create a free minutes promotional package. The section is designed in the form of a table that displays all currently available packages and has the following structure:

Screenshot: Packages section main window


<div>Packages</div>							
<div>+ New Package</div>		Rows 1 – 3 of 3 <div>20</div> « < Page 1 of 1 > »					
ID	Status	Name	Activation Fee	Subscription Fee	Period	Reseller	
4	<div></div>	Extra Package	2.00 USD	10.00 USD	1 month(s)	Reseller 1	<div></div>
3	<div></div>	Package 1	0.00 USD	0.00 USD	1 month(s)	Reseller 1	<div></div>
2	<div></div>	Package 2	0.00 USD	0.00 USD	1 month(s)	Reseller 1	<div></div>
<div>About Get Support 0.2518s</div>			© 2004-2018 JeraSoft. All Rights Reserved.				

Column	Description		
ID	ID of a package		
Status	Status of a package		
	<div></div>	Active	Package is in use by a customer
	<div></div>	Disabled	Package is not used
	<div></div>	Archived	Package is not used and not available anymore
Name	Title of a package		
Activation Fee	Fee that will be charged upon package activation		
Subscription Fee	Fee that will be charged upon package renewal		
Period	Package renewal period		
Reseller	Name of a reseller, to which a target package belongs		

The list of functional **buttons/icons** in the section includes:

Button/Icon	Description
<div>+ New Package</div>	Allows to create a new package
<div></div>	Allows deleting a package from the list. Requires confirmation

Advanced Search

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

Screenshot: Advanced Search drop-down menu

Reseller: all resellers

Status: Active

Dynamic Tag:

Allowed DID Tags:

Reset

Search

Field	Description
Reseller	Indicate a name of a target reseller
Status	Select the status of a package: <ul style="list-style-type: none">• Active• Disabled• Archive
Dynamic Tag	Indicate a target dynamic tag of a package
Allowed DID Tags	Indicate target DID tags of a package

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

Adding a New Package

You can add a new package by clicking the **New Package** button. A pop-up window with settings contains the following information:

Screenshot: New package creation form

Packages

GENERAL SETTINGS

Name:

Reseller: Company Name

Status: Active

Type: Customer

PERIOD SETTINGS

Period: 1 month(s)

Advance Renew: 1 hour(s)

Renew Due: month(s)

BILLING SETTINGS

Currency: USD

☐ Fees include taxes
☐ Align to Payment Terms
☐ Recalculate to Period
☐ Charge on Event

Setup fee: Charge if billed by volume limit

Client balance: Deny activate if negative

Create charge on: Pre-activation time

PACKAGE APPLICATION

Priority: 1

Dynamic Tag:

Start Date:

End Date:

FEES

Fee Type	Fee Name	Fee Note	Rate, USD
Activation	Activation Fee		0
Subscription	Subscription Fee		0

DID LIMITS

DIDs Quantity: 0

On Hold: 0 day(s)

Allowed Tags:

LIMITS

Code Deck:

No Volume Limits

DISCOUNTS


No Discounts




OK

Cancel

Apply

Information block	Field and Description	
General Settings	General information about a package	
	Name	Determine the name of your package
	Reseller	Specify an owner of this package
	Status	Select a current status for the package: <i>active/disabled/archive</i>
	Type	Specify the package type: <ul style="list-style-type: none"> Customer - this type indicates that services are provided to customers by a user's company. Vendor - this type indicates that services are provided to a user's company by vendors. <div> Attention This option has been added in version 3.16.0. </div>
Period Settings	Settings regarding a package period	
	Period	Specify a period for the current package if it's renewable
	Advance Renew	Next renewal will be made within a specified period in advance (before the renewal date) <div> Tip Renew intervals of packages will be converted to the smallest units. For example, 1 day + 1 hour = 25 hours. </div>

	<div>Renew Due</div> <div>Indicate a period, during which the system will try to renew a package. If no value is specified, attempts to renew a package will be endless.</div>
Billing Settings	List of settings concerning the billing feature
	<div>Currency</div> <div>Define a currency for this package</div>
	<div> <div>Fees Include Taxes</div> <div>checkbox</div> </div> <div>If enabled, taxes are included in package prices, if disabled – taxes will be calculated regarding a customer's respective Tax Profile</div>
	<div> <div>Align to Payment Terms</div> <div>checkbox</div> </div> <div>Allows the system to align a package period to customer's Payment Terms, equalizing Package billing with actual invoicing</div>
	<div> <div>Recalculate to Period</div> <div>checkbox</div> </div> <div>Allows recalculation of days up to the first Payment Terms period if the package was activated somewhere in the middle of it</div>
	<div> <div>Charge on Event</div> <div>checkbox</div> </div> <div>If enabled, a package subscription fee will be applied when the first call within this package is made. Otherwise, a package would be free.</div>
	<div>Setup Fee</div> <div>Select from a list of available options of setup fee settings:</div> <ul style="list-style-type: none"> Charge if billed by volume limit - setup fee will be charged when an event is billed by volume limit Don't charge if billed by volume limit - setup fee won't be charged when limit by volume is used for event billing
	<div>Client Balance</div> <div>Choose one of the following options:</div> <ul style="list-style-type: none"> Allow activate if negative - client's package will be activated regardless of the client's balance; however, package limits will be used only when it's not negative Deny activate if negative - client's package will be activated only if there are sufficient funds on the balance
	<div> <div>Create Charge on</div> </div> <div>Determine when the charge should be created:</div> <ul style="list-style-type: none"> Pre-activation time - create charge at the moment of period creation Period start time - create charge at the moment of a new period start
Package Application	Information on package application
	<div>Priority</div> <div>If there are multiple packages that satisfy a call, a package with the highest priority will be used (i.e. priority 2 < priority 1).</div> <div> <div>⚠ Attention</div> <div>Please note that packages with minutes will always be used before packages with money regardless of the priority.</div> </div>
	<div>Dynamic Tag</div> <div>Add a tag for the events, billed by this package</div>
	<div>Start Date</div> <div>Indicate an effective start date of a package. This feature is used for temporary packages.</div>
	<div>End Date</div> <div>Determine an effective end date of a package. This feature is used for temporary packages.</div>
Fees	Information block is used for package fees indication and presented in the form of a table. To add a new fee type, you need to click on a  icon next to its name.
	<div>Fee Type</div> <div>Select the type of fee. There are two possible types:</div> <ul style="list-style-type: none"> Activation – a fee that will be charged upon package activation Subscription – a fee that will be charged upon package renewal
	<div>Fee Name</div> <div>Specify a name of a fee</div>
	<div>Fee Note</div> <div>Here you may enter additional information about a fee</div>
	<div>Rate</div> <div>Indicate the price for a free. Price is indicated in the package currency</div>

DID Limits	Specify how many DIDs and from which group can be assigned to a customer with this package	
	DIDs Quantity	How many DIDs can be assigned to the client's accounts
	Allowed Tags	Specify tags that are used while creating DIDs
	On Hold	Indicate for how many days a DID is kept on hold after the package is deactivated
Limits	Here you can create promotional minute packets that will be included in the package. To add a new limit, click on a  icon next to Limits .	
	Code Deck	Specify a Code Deck if you plan to create limits by using Code Names
	Service	Define a service this limit will be used for
	Type	Select a limitation type from the drop-down list: <ul style="list-style-type: none"> • Money • Volume You can set both types within the same package
	Code	Specify a code. Please note that package limits are working only for the exact code. I.e., if a short code like 121 was added, package limits will work only for this code and won't automatically work for longer codes like 12157 . To make volume limits work for long codes, you must add * (for example, 121* code). If the Code Name field is specified, this one will be inactive.
	Code Name	Specify a code name from a selected Code Deck. If the Code field is specified, this one will be inactive.
	Limit	Enter the number of free minutes or bonus money (depends on a selected limitation type) that will be used for a specified code or code name
	<div>  Warning </div> <p>When you assign different packages (with specified volume limits and tags) to the same client, two or more packages could not be used simultaneously.</p>	
Discounts	A promotional discount of the package subscription fee. To add a new discount, click on the  icon next to Discounts .	
	Activation Count	Specify the sequence number of the reactivation when the package will trigger the discount. For example: if the Activation Count is 2 , the discount will be applied for the second package reactivation and further.
	Discount	Specify the amount of subscription fee cut. Discount is indicated in the package currency.

Tip

1. If the **client doesn't have enough money for a package activation**, a respective pending charge will appear. This charge includes all amounts needed for package activation. Also, you can add this charge to the invoice.
2. You can **assign the package in the past** and add package minutes backdated.
For example, you assign the **Canada 200 minutes** package on April 12th, but you want the package to be used since April 1st. Then, apply package rerating to recalculate the tariffication during the period. Please, run rerating after the assignment of the package for a current month
3. **Volume Limits** will be recalculated according to payment terms if the period is specified and both **Align to payment terms** and **Recalculated to Period** checkboxes are enabled.
4. Package reactivation will be stopped after the **Renew Due** period. However, a DID for this package will be expired after the **On Hold** period. Therefore, we recommend setting the same values for DID **On Hold** and Package **Renew Due** parameters.

Please keep in mind that:

1. When **two similar packages** (for example, with the same destinations) are **assigned to a client**, the system takes the package with the highest priority or earlier expiration date. Thus, only one package is used for one established call. The second package will be applied right after the first one is fully used.

2. If the **client doesn't have enough funds** for the package (with a DID number) reactivation and DID hold date has already expired, attempts for package reactivation will be stopped.



Attention

When you change the **name of the package** in **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 **Retail > Packages**.