Packages

In this article

- [Section overview](#)
- [Advanced Search](#)
- [Adding a New Package](#)

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

Column	Description
ID	ID of a package
Status	Status of a package

🟢	**Active**	Package is in use by a customer
🔴	**Disabled**	Package is not used
⚪	**Archived**	Package is not used and not available anymore

Column	Description
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
➕ New Package	Allows to create a new package
✖	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 🔽 icon and fill in the following fields with the required information:

Screenshot: Advanced Search drop-down menu

Field	Description
Reseller	Indicate a name of a target reseller
Status	Select the status of a package: - **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

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: *active/disabled/archive*

	Type	Specify the package type:
		• **Customer** - this type will be applied to traffic with negative transaction cost (generally, origination traffic);
		• **Vendor** - this type will be applied to traffic with positive transaction cost (generally, termination traffic).

> ✓ **Tip**
>
> As Packages are applied after the Rate identification in the system, it's important to understand which type of a Package will be used in a particular case. Let's say we have a Client with both Orig and Term roles in the system with the following setup:
>
> - both Customer and Vendor type Packages assigned with limits for '1' destination
> - orig Rate for '1' destination
> - term Rate for 1' destination
>
> If this Client has MADE a call for '1' destination, the system will be going to create a negative Transaction for this call. As we have a respective Customer type Package assigned, it will be used to bill this call.
>
> The same Client has RECEIVED a call for '1' destination, the system will be going to create a positive Transaction for this call. As we have a respective Vendor type Package assigned, it will be used to bill this call.
>
> **Note**: in case of negative pricing (negative Rates for origination or negative Rates for termination), the opposite types of Packages will be used. I.e., if we pay our Client for origination, and they have both Customer and Vendor type Packages assigned, the Vendor type Package will be used to bill origination traffic.

> ⚠ **Attention**
>
> This option has been added in version **3.16.0.**

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)

> ✓ **Tip**
>
> Renew intervals of packages will be converted to the smallest units. For example, 1 day + 1 hour = 25 hours.

	Renew Due	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.
Billing Settings		List of settings concerning the billing feature
	Currency	Define a currency for this package
	Fees Include Taxes checkbox	If enabled, taxes are included in package prices, if disabled – taxes will be calculated regarding a customer's respective **Tax Profile**
	Align to Payment Terms checkbox	Allows the system to align a package period to customer's Payment Terms, equalizing Package billing with actual invoicing
	Recalculate to Period checkbox	Allows recalculation of days up to the first Payment Terms period if the package was activated somewhere in the middle of it
	Charge on Event checkbox	If enabled, a package subscription fee will be applied when the first call within this package is made. Otherwise, a package would be free.
	Setup Fee	Select from a list of available options of setup fee settings: • *Charge* - setup fee will be charged when an event is billed by volume limit • *Don't charge*- setup fee won't be charged when limit by volume is used for event billing

	Client's Balance	Choose one of the following options: • **Allow activating if insufficient**- client's package will be activated regardless of the client's balance; however, package limits will be used only when the clients balance is sufficient; • **Deny activating if insufficient**- client's package will be activated only if there are sufficient funds on the balance
	Create Charge on	Determine when the charge should be created: • **Pre-activation day** - the charge will be created at the end of a current package period; • **Activation day** - the charge will be created when a new period starts
Package Application	Information on package application	
	Priority	If there are multiple packages that satisfy a call, a package with the highest priority will be used (i.e. **priority 2 < priority 1**). ⚠️ **Attention** Please note that packages with minutes will always be used before packages with money regardless of the priority.
	Dynamic Tag	Add a tag for the events, billed by this package
	Start Date	Indicate an effective start date of a package. This feature is used for temporary packages.
	End Date	Determine an effective end date of a package. This feature is used for temporary packages.
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.	
	Fee Type	Select the type of fee. There are two possible types: • **Activation –** a fee that will be charged upon package activation • **Subscription –** a fee that will be charged upon package renewal
	Fee Name	Specify a name of a fee
	Fee Note	Here you may enter additional information about a fee
	Rate	Indicate the price for a fee. Price is indicated in the package currency
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: • **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 (value range 1-2147483647).
	<table><tr><td>🔴 **Warning** When you assign different packages (with specified volume limits and tags) to the same client, two or more packages could not be used simultaneously.</td></tr></table>	
Discounts	A promotional discount of the package subscription fee. To add a new discount, click on the ➕ icon next to **Discounts**.	
	Activatio n 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.

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✅ **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. You can also 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. T herefore, we recommend setting the same values for DID **On Hold** and Package **Renew Due** parameters.

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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.

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⚠️ **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**.

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