

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>		<div>Rows 1 – 3 of 3</div> <div>20</div> <div>Page 1 of 1</div>					
ID	Status	Name	Activation Fee	Subscription Fee	Period	Reseller	
4	<div></div>	Package 1	0.00 USD	0.00 USD	1 month(s)	Reseller A	<div></div>
5	<div></div>	Package 2	0.00 USD	0.00 USD	1 month(s)	Reseller A	<div></div>
6	<div></div>	Package 3	0.00 USD	0.00 USD	1 month(s)	Reseller A	<div></div>

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		


⚠ Attention

Please note that the **Package archiving** will perform closing of the current **Subscription** used for this package.

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:

Status:

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

Edit Package

Custom Fields

pack1

GENERAL SETTINGS

Name: pack1

Reseller: Company Name

Status: Active

Type: Customer

PERIOD SETTINGS

Period: 1 month(s)

Advance Renew: 1 hour(s)

Renew for: hour(s)

BILLING SETTINGS

Currency: USD

☐ Fees Include Taxes

☐ Align to Payment Terms

☐ Full Charge

☐ Charge on Event

Setup Fee: Charge

Client's Balance: Deny activating if insufficient

Create Charge on: Pre-activation Day

PACKAGE APPLICATION

Priority: 1

Dynamic Tag:

Start Date:

End Date:

FEES

Fee Type	Fee Name	Fee Note	Rate, USD
Activation	Activation Fee		6
Subscription	Subscription Fee		3

DID LIMITS

DIDs Quantity: 0

On Hold: 0 day(s)

Allowed DID 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>

	<p>Type</p> <p>Specify the package type:</p> <ul style="list-style-type: none"> • 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). <div style="border: 1px solid #c6e0b4; padding: 10px; margin-top: 10px;"> <p> Tip</p> <p>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:</p> <ul style="list-style-type: none"> • both Customer and Vendor type Packages assigned with limits for '1' destination • orig Rate for '1' destination • term Rate for '1' destination <p>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.</p> <p>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.</p> <p>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.</p> </div> <div style="background-color: #ffffcc; padding: 10px; margin-top: 10px;"> <p> Attention</p> <p>This option has been added in version 3.16.0.</p> </div>
Period Settings	Settings regarding a package period
	<p>Period</p> <p>Specify a period for the current package if it's renewable. Allowed values: 1-24 hours, 1-99999 days, 1-12 months, 1-99999 years.</p>
	<p>Advance Renew</p> <p>Next renewal will be made within a specified period in advance (before the renewal date). Allowed values: 1-24 hours, 1-99999 days, 1-12 months, 1-99999 years.</p>
	<p>Renew For</p> <p>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. Allowed values: 1-24 hours, 1-99999 days, 1-12 months, 1-99999 years.</p>
Billing Settings	List of settings concerning the billing feature
	<p>Currency</p> <p>Define a currency for this package</p>
	<p>Fees Include Taxes checkbox</p> <p>If enabled, taxes are included in package prices, if disabled – taxes will be calculated regarding a customer's respective Tax Profile</p>
	<p>Align to Payment Terms checkbox</p> <p>Allows the system to align a package period to customer's Payment Terms, equalizing Package billing with actual invoicing.</p> <div style="background-color: #ffffcc; padding: 10px; margin-top: 10px;"> <p> Attention</p> <p>The length of the first Subscription period can be reduced in order to allow the following periods to match the invoicing periods in the Client's Payment Terms. All the charges and limits of the first period will be proportionally recalculated if the duration of the first period has been reduced.</p> <p>In order to process it correctly, the Package Period should match the Client's Payment Terms length. Alternatively, the periods of the Package and Payment Terms need to equal to a multiplex number. In this case, we will get equal Package charges in each invoice provided the periods are equal. If the Package period is longer than the Payment Terms length, we will get the Package charges with an equal interval.</p> </div>

	Full charge checkbox	Allows forcing full charge and limits for the first period regardless of the enabled Align to Payment Terms option.
	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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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 client's 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: <ul style="list-style-type: none"> • 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 <div>  Tip This parameter will affect when the Package charge will be included in an Invoice. For example: <ul style="list-style-type: none"> ▪ the Pre-activation day option is typically used for pre-paid as the system will create a charge just before the Package renewal. Thus, for a monthly Package, a charge for Feb will be created on Jan 31st and fall into Jan Invoice, etc. ▪ the Activation day option is typically used for post-paid as the system will create a charge right on the renewal. So, for a monthly Package, a charge for Feb will be created on Feb 1st and fall into Feb invoice, etc. </div>
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). <div>  Attention Please note that packages with minutes will always be used before packages with money regardless of the priority. </div>
	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: <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
	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: <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
	 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.	
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** is 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**.