

# Subscriptions

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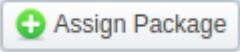







## Section overview

This section is designed to provide a wide variety of functions to control and manage subscriptions. 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: Subscriptions list


Subscriptions									
Assign Package									
Rows 1 ~ 2 of 2									
Page 1 of 1									
ID	Client	Package	Qty	Limits	Current Period	Subscription Period			
3	Customer C	Minutes SMALL	3		04/30/2021 19:30:03	04/30/2021 19:04:15			
5	Customer A	Minutes BIG	1	Calls *	04/30/2021 19:30:03	Not Defined			
					04/01/2021 00:00:00	03/01/2021 00:00:00			
					05/01/2021 00:00:00	Not Defined			

Column	Description
ID	Subscription identification number
Client	Name of a client (and account, if specified), to whom a package is assigned
Package	Name of an assigned package
Qty	Quantity of the assigned packages
Limits	Shows if a respective package has some volume limits and time or money left <ul style="list-style-type: none"><li>• On the left side of the bar, it shows the <b>service, destinations, code, or code names</b>.</li><li>• On the right side of the bar, it shows a <b>specified limit</b> and the amount left.</li></ul>
Current Period	Date of package activation for a respective client/account End date of a package period (a package period is set in Packages Period Settings)
Subscription Period	Effective start and stop date of the subscription

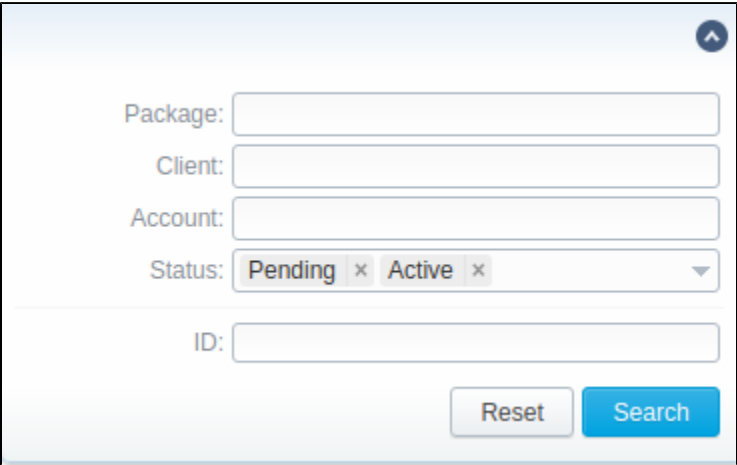
Button/Icon	Description
	Allows assigning a package to a corresponding client/account
	Shows the full list of packages that were assigned to this client/account
 Unknown Attachment	Marks a package that was successfully activated and will renew itself due to the package settings
 Unknown Attachment	Marks 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 subscription
<a href="#">blocked URL</a>	Allows a user to stop the package at the beginning of the current period ( <a href="#">with balance rollback</a> ).
	Allows a user to stop the package at the end of the current period.
	Cancels the active package

	Removes a subscription completely
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## 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
<b>Package</b>	Indicate the name of a target package
<b>Client</b>	Specify a target client
<b>Account</b>	Specify a client's target account
<b>Status</b>	Select the status of a package: <ul style="list-style-type: none"><li>• <b>Pending</b></li><li>• <b>Active</b></li><li>• <b>Archive</b></li></ul>
<b>ID</b>	Specify a respective subscription 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: Subscriptions add form*

**Subscriptions**

GENERAL SETTINGS

Package:   
Client:   
Account:   
Quantity:  as a single subscription

OVERIDDEN PACKAGE FEES

*Default Package fees will be used*

SUBSCRIPTION DURATION

Start Date:   
Cancel Date:

SPECIAL PROCESSING

First Charge:   
Activate in the past: ☐

OK

Cancel

Apply

Information block	Field	Description
General Settings	<b>Package</b>	Name of an assigned package
	<b>Client</b>	Name of a client, to whom a package is assigned
	<b>Account</b>	Name of an account, to whom a package is assigned
	<b>Quantity</b>	Number of packages to be assigned. You can assign multiple packages <ul style="list-style-type: none"> <li>as a single subscription (<i>will create one line in a list of assigned Subscriptions with respective Qty value</i>)</li> </ul> or <ul style="list-style-type: none"> <li>as multiple subscriptions (<i>will create several lines respectively in a list of assigned Subscriptions for each individual one to manage separately</i>)</li> </ul>
Subscription Duration	<b>Start Date</b>	Package limits and discounts are only effective after a specified date
	<b>Cancel Date</b>	Package limits and discounts are disabled after a specified date
Special Processing	<b>First Charge</b>	Determine when the first charge should be created: <ul style="list-style-type: none"> <li><b>Before period start</b></li> <li><b>On period start</b></li> </ul>
	<b>Activate in the past checkbox</b>	If checked, and the <b>Start Date</b> field value is in the past, a subscription will be activated on the specified date
Override Package Fees	<b>Fee Type</b>	Select the type of fee. There are two possible types: <ul style="list-style-type: none"> <li><b>Activation</b> – a fee that will be charged upon subscription activation</li> <li><b>Subscription</b> – a fee that will be charged upon subscription renewal</li> </ul>
	<b>Fee Name</b>	Specify the name of a fee. This field is obligatory
	<b>Fee Note</b>	Here you may enter additional information about a fee
	<b>Rate, (currency)</b>	Indicate the price for a fee. Price is indicated in the package currency. This price will overwrite the fee of a Package


### Warning

If you click the delete [blocked URL](#) icon (**remove an archived package entirely**) in the **Subscriptions** 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 Subscription

When clicking on the edit  icon, detailed information on a subscription is displayed. In the **Billing Details & Overridden Package Fees** data blocks, a user can view and manage general info regarding the subscription charges. Also, a user can change the subscription **Cancel Date** in a respective field of the **Subscription Duration** block.

To make it easier for a user to keep records of package limits, the **Periods** information block provides a detailed view of package limits for each activation period.

Screenshot: Subscription edit form

 Subscriptions

SUBSCRIPTION

Package: **Minutes BIG**

Client: **Customer A**

Account: All Accounts

Quantity: **1**


BILLING DETAILS

☒ Charged

☐ Charge on Event

☒ Align to Payment Terms


☐ Full Charge


☒ Overridden Package Fees 


SUBSCRIPTION DURATION

Start Date: **03/01/2021 00:00:00 +0000**




Cancel Date:

OVERIDDEN PACKAGE FEES 

Fee Type	Fee Name	Fee Note	Tags	Rate, USD	
Activation	Activation Fee			1	

 Discounts from the Package will not be used

PERIODS

Rows 1 – 2 of 2  20  Page 1 of 1 

Status	Period	Limits
Active	04/01/2021 00:00:00 05/01/2021 00:00:00	Calls * 10 000.00 min <input type="text"/> Left: 9 696.02
Archive	03/01/2021 00:00:00 04/01/2021 00:00:00	Calls * 10 000.00 min <input type="text"/> Left: 9 413.00

OK

Cancel

Apply

### Attention

When you change the **name of the package** in the **Retail > Packages**, it will be automatically changed in the **Management > Subscriptions** 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 editing the name of an already assigned package in the *Retail > Packages*.**