

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									
<div>Assign Package</div>									
Rows 1 – 4 of 4 20 Page 1 of 1									
ID	Client	Account	Package	Limits	Current period start/stop	Subscription start/stop			
2	client 4		2		06/30/2020 10:23:09 07/30/2020 10:23:09	06/30/2020 00:00:00 07/30/2020 00:00:00			
3	client 1		package test		06/30/2020 10:25:26 07/30/2020 10:25:26	06/30/2020 00:00:00 07/30/2020 00:00:00			
4	client 2		package test		06/30/2020 10:25:48 07/30/2020 10:25:48	06/30/2020 00:00:00 07/11/2020 00:00:00			
5	client 1		package 3	22 100.00 min	06/30/2020 10:30:09 07/30/2020 10:30:09	06/30/2020 00:00:00 07/18/2020 00:00:00			


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Column	Description
ID	Subscription 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	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 Start/Stop	Effective start and stop date of the subscription

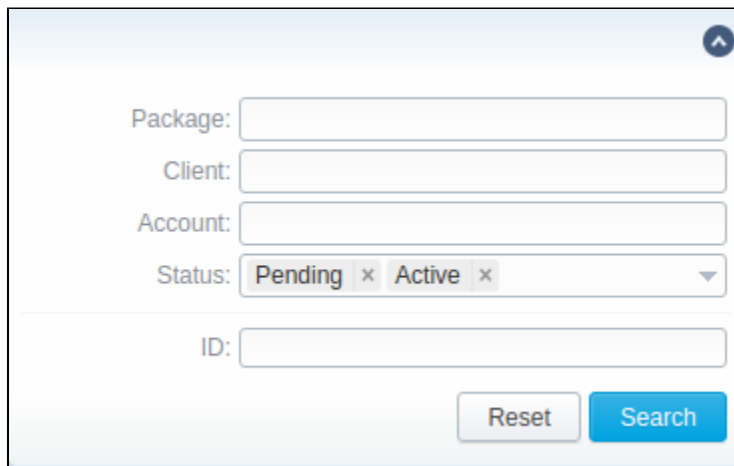
Button/icon	Description
<div>Assign Package</div>	Allows assigning a package to a corresponding client/account
	Shows the full list of packages that were assigned to this client/account
<div>? Unknown Attachment</div>	Marks a package that was successfully activated and will renew itself due to the package settings
<div>? Unknown Attachment</div>	Marks a package that is new for a current user and was not activated yet
<div>? Unknown Attachment</div>	Marks a package that is in the archive
	Allows editing a client's subscription
<div>blocked URL</div>	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 a subscription 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 package: <ul style="list-style-type: none"> • Pending • Active • Archive
ID	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:

Free Minutes SMALL

Client:

Customer B

Account:

Start Date:

2020-04-01 00:00:00

End Date:

Quantity:

1

Activate in the past:

☒

OVERVERRIDE PACKAGE FEES

Fee Type	Fee Name	Fee Note	Rate, USD	
Activation	Activation Fee		0.5	
Subscription	Subscription Fee		10	

⚠ Discounts from Package will not be used

OK

Cancel

Apply

Information block	Field	Description
General Settings	<i>Client</i>	Name of a client, to whom a package is assigned
	<i>Account</i>	Name of an account, to whom a package is assigned
	<i>Package</i>	Name of an assigned package
	<i>Start Date</i>	Package limits and discounts are only effective after a specified date
	<i>End Date</i>	Package limits and discounts are disabled after a specified date
	<i>Quantity</i>	Number of packages to be assigned
	<i>Activate in the past</i> checkbox	If checked and the Start Date field value is in the past, a subscription will be activated on the specified date
Override Package Fees	<i>Fee Type</i>	Select the type of fee. There are two possible types: <ul style="list-style-type: none">• Activation – a fee that will be charged upon subscription activation• Subscription – a fee that will be charged upon subscription renewal
	<i>Fee Name</i>	Specify the name of a fee. This field is obligatory
	<i>Fee Note</i>	Here you may enter additional information about a fee
	<i>Rate, (currency)</i>	Indicate the price for a fee. Price is indicated in the package currency. This price will overwrite the fee of a Package

Warning

Screenshot: Limits History information block



Subscriptions

GENERAL SETTINGS

Client: **Customer D**

Account: All Accounts

Package: **FREE MINUTES small**

Start Date: 05/01/2017 00:00:00 +0000

End Date:

Status: **Active**

Charge on Event: No

Charged: Yes

Reactivations: 20

Align to Payment Terms: Yes

Recalculate to Period: No

LIMITS HISTORY

Rows 1 – 10



10 ▼

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	Limits	Period Start Date	Period End Date
	* 15.00 min	04/01/2020 00:00:00	05/01/2020 00:00:00
	* 15.00 min	01/01/2020 00:00:00	02/01/2020 00:00:00
	* 15.00 min	12/01/2019 00:00:00	01/01/2020 00:00:00
	* 15.00 min	11/09/2019 03:20:05	12/01/2019 00:00:00
	* 15.00 min	05/02/2019 09:32:05	06/01/2019 00:00:00
	* 15.00 min	02/26/2019 03:18:08	03/01/2019 00:00:00
	* 15.00 min	12/14/2018 15:40:03	01/01/2019 00:00:00
	* 15.00 min	11/12/2018 03:21:03	12/01/2018 00:00:00
	* 15.00 min	09/11/2018 03:20:07	10/01/2018 00:00:00
	* 15.00 min	08/09/2018 09:49:11	09/01/2018 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 > 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 to edit the name of an already assigned package in the *Retail > Packages*.**