

Subscriptions

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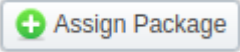
Section overview

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 • On the left side of the bar, it shows the service, destinations, code, or code names. • On the right side of the bar, it shows a specified limit and the amount left.
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

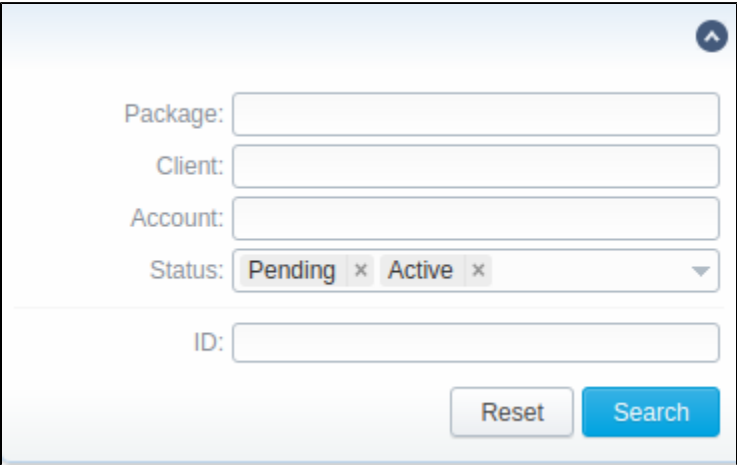
Button/Icon	Description
	Allows assigning a package to a corresponding client/account
	Shows the full list of packages that were assigned to this client/account
 Unknown Attachment	Marks a package that was successfully activated and will renew itself due to the package settings
 Unknown Attachment	Marks 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
blocked URL	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
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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
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: • 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:
Client:
Account:
Quantity: as a single subscription

SUBSCRIPTION DURATION

Start Date:
Cancel Date:

SPECIAL PROCESSING

First Charge:
Activate in the past: ☐

OVERRIDDEN PACKAGE FEES

Default Package fees will be used

OK

Cancel

Apply

Information block	Field	Description
General Settings	Package	Name of an assigned package
	Client	Name of a client, to whom a package is assigned
	Account	Name of an account, to whom a package is assigned
	Quantity	Number of packages to be assigned. You can assign multiple packages - as a single subscription (<i>will create one line in a list of assigned Subscriptions with respective Qty value</i>) or - as multiple subscriptions (<i>will create several lines respectively in a list of assigned Subscriptions for each individual one to manage separately</i>)
Subscription Duration	Start Date	Package limits and discounts are only effective after a specified date
	Cancel Date	Package limits and discounts are disabled after a specified date
Special Processing	First Charge	Determine when the first charge should be created: Before period start On period start
	Activate in the past 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	Fee Type	Select the type of fee. There are two possible types: Activation – a fee that will be charged upon subscription activation Subscription – a fee that will be charged upon subscription renewal
	Fee Name	Specify the name of a fee. This field is obligatory
	Fee Note	Here you may enter additional information about a fee
	Rate, (currency)	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

ACTIVE

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 < 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 Left: 9 696.02
Archive	03/01/2021 00:00:00 04/01/2021 00:00:00	Calls * 10 000.00 min 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*.