

GETTING STARTED FEATURE BUNDLES

Overview

All users on the Cloud Communications PBX have access to control their PBX. This means that customers can add devices and all other functionalities. Depending on your business model it's possible that you bill certain functionalities. With the Feature Bundles you are able to show a pop-up if your customer is adding a new functionality which isn't included in their subscription. You and your customer receive an email notification as an confirmation that their subscription is changed.

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1. Creating Feature Bundles

Providers and Resellers are able to create multiple Feature Bundles. Each Billing Plan can be assigned to a customer.

1.1 Create a Bundle Plan

In the Provider Panel or Reseller Panel, navigate in the top menu to 'Billing'. A second menu will appear; go to 'Feature Bundles' and click on 'Add Bundle'.

Now a pop-up will appear and you can start creating the Feature Bundle. First start with a name and a description.

Under 'Warning message' you can fill in the warning that will appear in the Company Panel. Below you find all the features within the Company Panel. Here you can fill in the amount per feature.

The screenshot shows a 'Feature bundle creation' form with the following fields and options:

- Name ***: Text input field containing 'Basic bundle'.
- Description**: Text input field.
- Warning message ***: Text input field containing 'This action is not included in your bundle, additional costs may apply.'
- Send warning message via email instead of default
- Choose the color of box**: Dropdown menu with 'Green' selected.
- Features**: A grid of input fields for various features, all set to '0':
 - Dialplans: 0
 - Mailboxes: 0
 - Queues: 0
 - Faxboxes: 0
 - IVRs: 0
 - Time conditions: 0
 - Extensions: 0
 - Devices: 0
 - Trunks: 0

If the user exceeds the limit, the warning message will appear on the Company Panel. After saving the feature, the email notification is sent to both the Company and Provider/Reseller.

1.2 Assign the Bundle Plan

After the first Feature Bundle Plan is created, you can assign it to your customer. Navigate in the top menu to 'Organizations' and search the customer. Now click on the 'edit' icon and scroll down till you see 'Bundle Plan'. In the Drop-down you will see your Bundle Plans and select the Billing Plan for the customer. After selecting the Billing Plan, press 'Save changes' at the right top of the screen.

The screenshot shows the 'BUNDLE PLAN' assignment screen with the following elements:

- Please choose a bundle plan**: A dropdown menu with 'Select an item' as the placeholder.
- CHOOSE EXCEPTIONS (IF APPLICABLE)**: A section with a dropdown menu 'Select an item' and an input field 'Enter value'.
- ADD TO LIST**: A button with a plus icon.
- Message**: 'NO EXCEPTIONS HAVE BEEN ADDED, PLEASE ADD AN EXCEPTION BY CLICKING THE "ADD TO LIST" BUTTON ON THE LEFT.'

2. Feature Bundle Exceptions

When a user is logged in under Provider user credentials, the user can set, manage or delete exceptions for the Company's Feature Bundles via the Company settings in the Provider or Reseller panel.

With the introduction of this feature a separate segment for 'Bundle Plan' in the Company settings becomes available via the Provider or Reseller panel.

The screenshot shows a web interface for managing feature bundle exceptions. It has a header 'BUNDLE PLAN'. Below it, there's a dropdown menu for selecting a bundle plan. Underneath, there's a section for adding exceptions, which includes a dropdown for selecting an item and a text input for entering a value. An 'ADD TO LIST' button is at the bottom of this section. On the right side, a message states that no exceptions have been added and instructs the user to click the 'ADD TO LIST' button.

Both the assignment of a Bundle Plan and/or application of the exceptions are optional, meaning a Company can be created without a Bundle Plan and/or exceptions assigned.

2.1 Add exceptions

The exceptions to a Company can be added either with or without a Bundle Plan assigned to the Company. In the first case choose the Bundle Plan from the dropdown menu and set the exceptions. In the second case leave the field "Bundle Plan" empty and only add the desired exceptions.

To actually set the exceptions choose the desired item(s) for which you would like to apply an exception from the dropdown menu and provide the value for this particular item. The following items are available:

- Dial plans,
- Mailboxes,
- Queues,
- Faxboxes,
- IVRs,
- Time conditions,
- Extensions,
- Devices,
- Trunks,
- Days for Call recording,
- Users for Call recording,
- Trunk concurrent calls,
- Users for Qaller Plus,
- Users for Operator Consoles.

Once applied the exceptions remain active even if a Bundle Plan is assigned, changed or removed from the Company. So you do not need to reconfigure the exceptions in case you need to change the Bundle Plan for the Company.

Value

The field "Value" may be filled with any value from the range 0-9999 or left empty.

CHOOSE EXCEPTIONS (IF APPLICABLE)

Select an item Enter value

Mailboxes

+ ADD TO LIST

In case the field "Value" is left empty, the value will be added as "Unlimited".

Warning message *

This action is not included in your bundle, additional costs may apply.

x	Extensions:	9999
x	Devices:	0
x	Mailboxes:	UNLIMITED

Once the item and value are chosen, click on the "Add to List" button and the exception will become visible at the right side of the Bundle Plan section.

To change the value of the item delete the exception for the item and add the item with the desired value again.

Due to the validation rule for the Exception Items you are not allowed to add the same Item again. You will first have to remove the particular item. To delete the Exception Item press "x" sign.

Warning message

The "Warning message" field automatically appears at the right side of the segment when an exception is added and remains present till at least one exception is added.

In case a Bundle Plan is assigned to a Company, a warning message equal to the message in the Bundle Plan will be shown. In the Exceptions section this message can be changed to a customized warning. This customized warning will not affect the Bundle Plan message itself.

If there is no Bundle Plan assigned to the Company, an empty warning message will be shown. In this case it's required to provide a custom "Warning message", otherwise the validation will prevent the Company settings to be saved. The warning message field will remain red outlined to indicate the field is required as long as you do not provide a value.

The warning message at the right side of the segment automatically disappears when all exceptions are deleted from the list of exceptions.