

Creating Packages

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About Packages

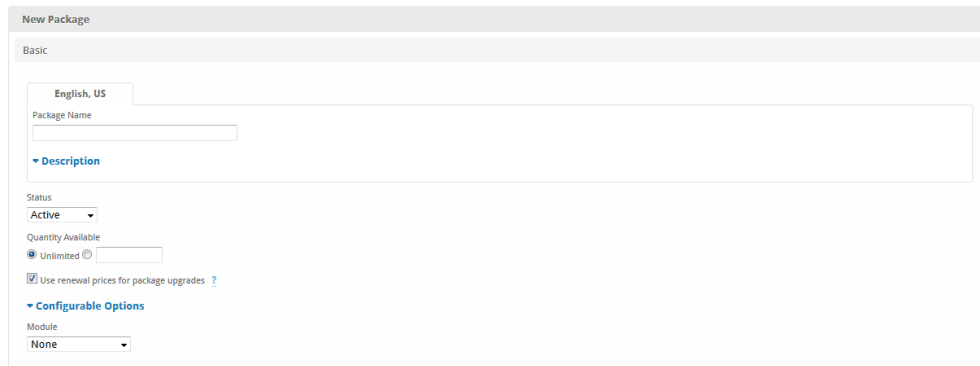
Packages are basically products or plans. Packages can appear on order forms and be ordered by clients, or added manually by staff. An ordered package becomes a service, which may or may not recur, depending on the pricing option selected. A recurring service results in recurring invoices being generated for the renewal period.

Creating Packages

Packages can be created under Packages by clicking the [+] button in the upper right.

A form will be presented with the following sections:

Basic



The screenshot shows the 'New Package' form with the 'Basic' tab selected. It includes fields for 'Package Name', a 'Description' section with a plus icon, a 'Status' dropdown set to 'Active', a 'Quantity Available' section with a radio button for 'Unlimited' and an input field, a checkbox for 'Use renewal prices for package upgrades', a 'Configurable Options' section with a plus icon, and a 'Module' dropdown set to 'None'.

Field Name	Description
Package Name	Enter a friendly name for the package. This is what the client will see when ordering the package, and on any invoices. A separate name can be defined for each language in the system.
Description	Enter a description for the package. This description will be displayed on any order forms. A separate description can be defined for each language in the system.
Status	Select the status for the package. In most cases, Active should be selected. Inactive Packages cannot be used, and Restricted Packages can be used only by select clients*.
Quantity Available	If this package is limited to a specific quantity, enter the quantity available here. Otherwise, select "Unlimited".
Use renewal prices for package upgrades	When enabled, upgrading to this package will use renewal prices if they are set. The same will apply to any configurable options that are altered in the upgrade. The regular price will be used if this setting is disabled.
Configurable Options	One or more Configurable Option groups may be selected. The configurable option fields will be requested when ordering the service.
Module	Select the module that this package will use for provisioning. If you're unsure, select the "Universal Module".

* Client access to restricted packages can be defined using the 'Set Packages' action on the client profile. This feature was implemented in v2.13 of the order plugin which is compatible with v4.x of Blesta.

Module Options

By default Module Options does not appear, but may appear when a module is selected within the Basic section. This section can vary greatly, because the module will prompt for additional information if it requires it.

Pricing



You can specify pricing values up to four decimals. e.g. 0.0385 which is useful when selling high quantity items, such as per gigabyte or VOIP billing. The values are rounded after they are totaled on invoices.

The Pricing section allows a price, renewal price, setup fee, and cancellation fee to be set for a given term, period, and currency. An example would be: 1 (term) month (period) USD (currency) with a price of \$15, setup fee of \$0, and a cancellation fee of \$50. Any combination of terms, periods, currencies and pricing may be set, but it is recommended to avoid creating pricing with identical term, period, and currency options. When multiple currencies are offered, setting the price for each currency will ensure that the specified currency is used. If the package is ordered in a currency that does not have pricing specified, the current exchange rate will be used. If enabled, the renewal price will be used for service renewals and possibly prorated service changes, depending on the setting above.

1. Taxable - Select this option if tax should be assessed on this package.
2. Cancel at end of term - Select this option to automatically schedule a cancellation of the service at the end of the term. The service will not renew.
3. Enable Pro Rata - Select this option to enable pro rata.

Pro Rata allows new services to be prorated to a specific date. Some companies prefer all services to renew on the 1st of each month, for example.

Field Name	Description
Pro rata Day	Select the day of the month new services should renew on, and for which initial orders will be prorated to.
Pro rata Cutoff Day	Select the cutoff day for pro rata. If the cutoff day has passed, the client will be requested to pay the prorated amount from the current day until the pro rata day, plus the subsequent period. If before the cutoff day, only the prorated amount will be charged.

The Welcome Email section displays a WYSIWYG (What you see is what you get) editor and has two tabs for each language, one for HTML, and the other Text. Both should be populated. When a service using this package is provisioned, the client will be sent an email with the contents of this section. Certain tags, depending upon the module, may be entered and will be substituted in the delivered email. For a list of tags available generally, and for specific modules see [Modules](#).

All packages must belong to at least one group in order to be usable. The package group may be a standard or add-on group. Package groups create a heirarchy between packages, separating those that are standard packages or add-on packages. If creating your first package, it's likely that no Package Groups yet exist. You'll be prompted to create one by default. If one or more Package Groups already exist, you'll be able to select Package Groups in a multi-select field by default.

Group Membership

A package must belong to at least one group to be usable.

Select from Available Groups

Create a New Group

English, US

Create Package

After entering necessary details, click the "Create Package" button to create the Package.

Deleting Packages

Packages can be deleted under [Packages] > Browse, by selecting the "Delete" option under Options for the Package that you would like to remove. A confirmation dialogue will be presented. A package that is currently in use by any services cannot be deleted.

