Reassign Pricing

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About Reassign Pricing

Reassign Pricing is a plugin that allows staff to change the package and pricing of a service. Normally staff would perform an upgrade or downgrade on a service to perform this action. However, it's not possible to perform an upgrade or downgrade to a package that is not within the same package group. This plugin allows the pricing to be changed to a package outside the services package group.



Use Upgrade/Downgrade if Possible

If you are upgrading or downgrading to another package within the same group, use the Upgrade/Downgrade feature by clicking the "Manage" link next to the service in the client area instead. This plugin should only be used when changing to a package/pricing option that is not normally available for upgrade/downgrades. This plugin will not do proration, or resolve configurable option discrepancies.

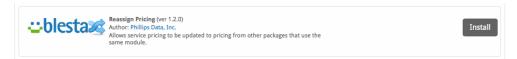
Tie-Ins*

Widgets	Nav Links	Client Cards	Automation Tasks	Email Templates	ACL Permissions	Search	Ev
NONE	PROFILE ACTIONS	NONE	NONE	NONE	NONE	NONE	

^{*} Plugins are powerful and are not limited to the tie-ins listed above, these are just some of the most common

Installing Reassign Pricing

To install the Reassign Pricing plugin, visit [Settings] > [Company] > [Plugins] > Available, and click the "Install" button for Reassign Pricing.



A message will be displayed, indicating that the plugin was successfully installed.



Usage

The plugin registers a link within Client Profile pages under [Account Actions] called "Reassign Pricing".

Account Actions

- Create Invoice
- **■** Make Payment
- Record Payment
- **m** Payment Accounts
- Add Service
- A+ Add Contact
- Add Note
- **&** Set Packages
- **☑** Email Client
- Login as Client
- □ View Mail Log
- **≜**x Delete Client
- Reassign Pricing
- Open Ticket

Show Common Actions -

To reassign the pricing of a package, follow these steps:

- 1. Click the "Reassign Pricing" link under Account Actions.
- 2. Select the "Reassign Pricing" link next to the service you wish to reassign pricing for. (See Fig 1)
- 3. Select the new "Package/Term", and click the "Save" button. (See Fig 2)

Fig 1



Fig 2

