

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.



Reassign Pricing (ver 1.2.0)
Author: Phillips Data, Inc.
Allows service pricing to be updated to pricing from other packages that use the same module.

Install

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

**The plugin was successfully installed. It may have registered ACL permissions for various resources. You may need to grant your staff group access to these permissions in order to access these resources.**

Usage

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

Account Actions

-  **Create Invoice**
-  **Make Payment**
-  **Record Payment**
-  **Payment Accounts**
-  **Add Service**
-  **Add Contact**
-  **Add Note**
-  **Set Packages**
-  **Email Client**
-  **Login as Client**
-  **View Mail Log**
-  **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

Services for Client #1500					
Back to Client #1500					
Package	Label	Term	Date Created ▼	Date Renews	Options
U Test Product		1 Month @ \$5.00	Mar 07, 2018	Apr 07, 2018	Reassign Pricing
Test Package		1 Month @ \$5.00	Feb 28, 2018	Mar 28, 2018	Reassign Pricing

Fig 2

 **Reassigning pricing will only change the package and pricing associated with this service. Do not perform this action for upgrades or downgrades.**

Reassign Pricing for Service: U Test Product -

Service Information

Package Name: U Test Product
Label:
Quantity: 1
Term: 1 Month
Package Name: Active
Date Added: Mar 07, 2018
Date Renews: Apr 07, 2018
Renewal Price: \$5.00

Reassign Pricing

Package/Term

1 Month - \$5.00

Cancel

Save