



MANAGE A RATE PLAN

Quick Start Guide

[Abstract](#)

This guide is a quick reference guide that helps a PO persona to access the SAMi API Marketplace Portal and create, edit, publish, or delete a rate plan.



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Manage Rate Plans from PO Dashboard

The Product Owner will be allowed to Manage Rate Plan using the main menu.

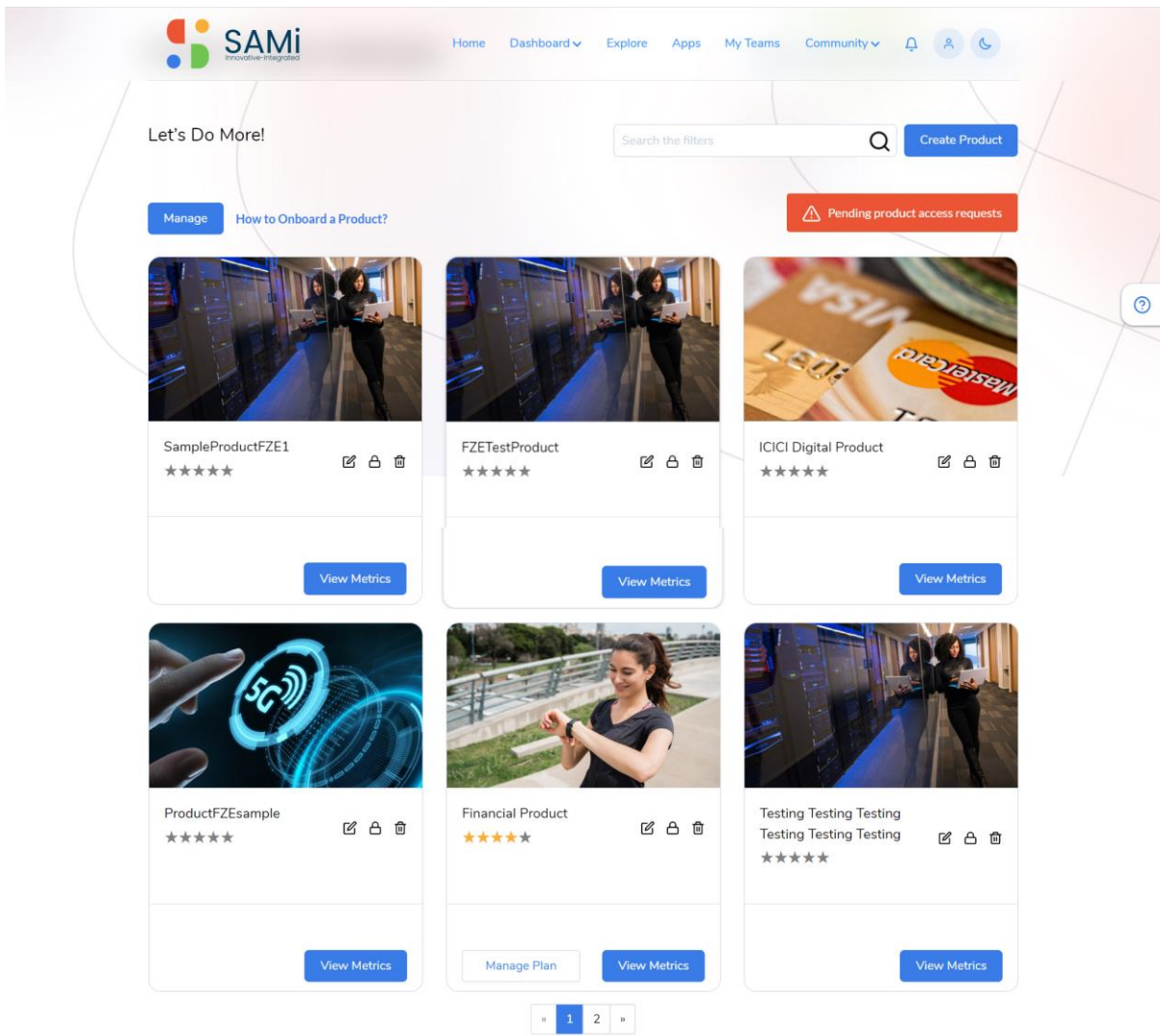
Create A Rate Plan

To create a rate plan, follow the procedure:

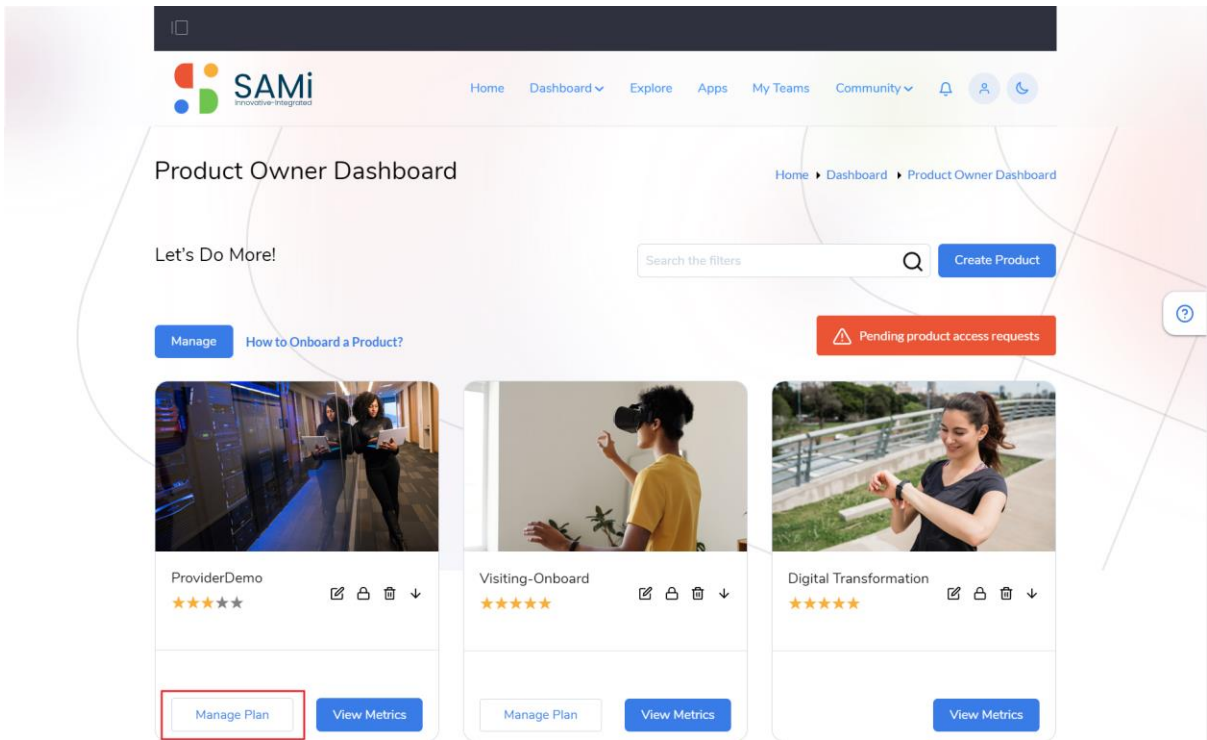
Step 1: Login as a Product Owner.

Step 2: Enter the URL: <http://sam-portal-dev.demo.sidglobal.cloud/home> in the browser.

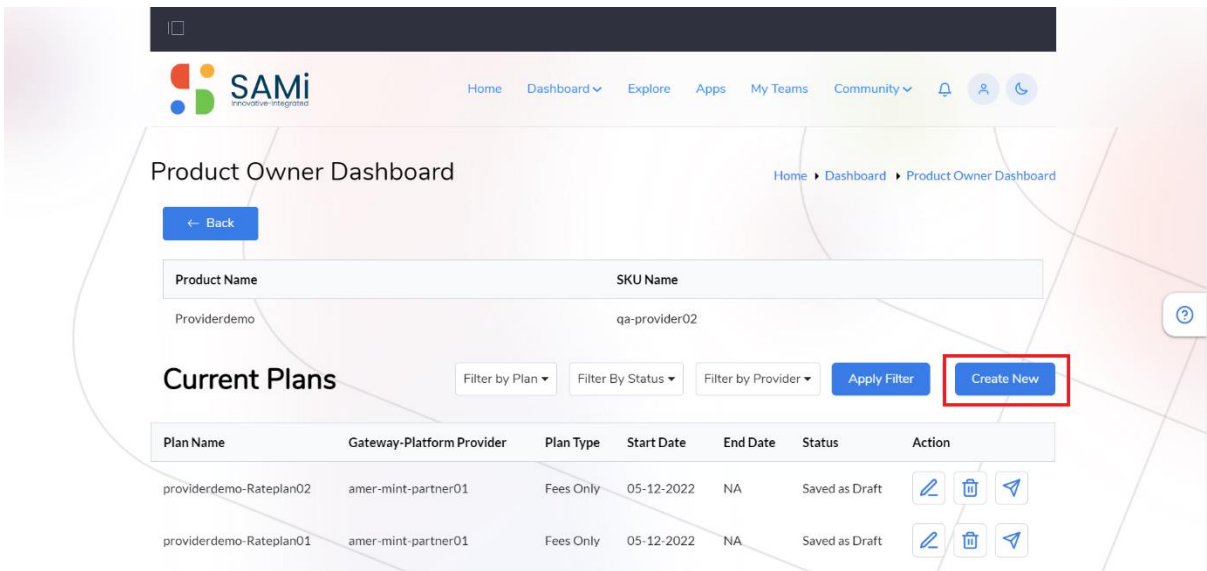
You will land on to the Product Owner Dashboard.



Step 3: The Product Owner will be able to Manage Rate Plans click **Manage Plan** button on any card to create a rate plan for that product. See next page.

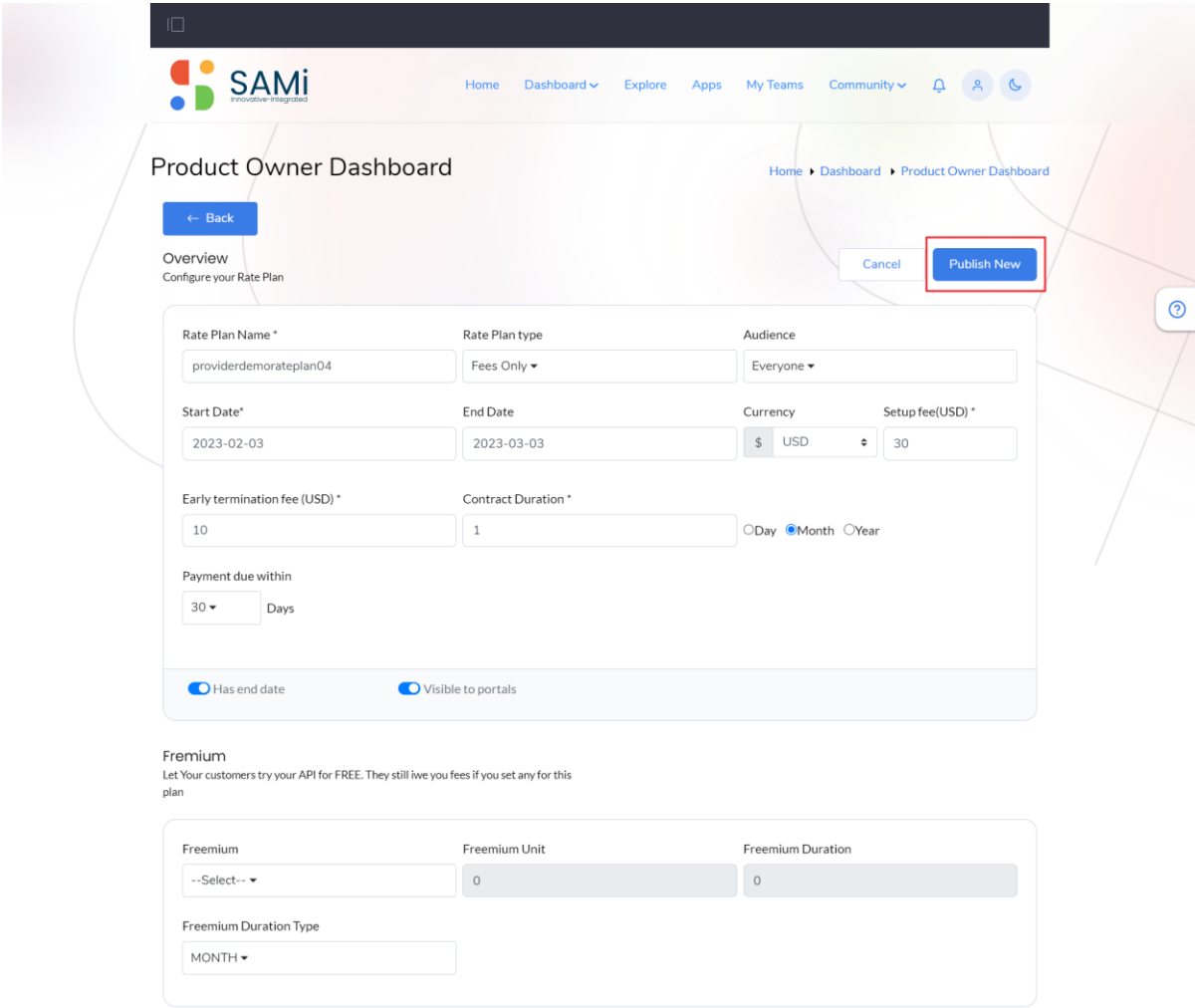


The Product Owner Dashboard with the list of Current Plans appears.



Step 5: Click on **Create New**.

The Overview - Configure Your Rate Plan page appears. See next page.



The screenshot shows the 'Product Owner Dashboard' with a 'Configure your Rate Plan' form. The form contains the following fields and values:

- Rate Plan Name: providerdemorateplan04
- Rate Plan type: Fees Only
- Audience: Everyone
- Start Date: 2023-02-03
- End Date: 2023-03-03
- Currency: USD
- Setup fee(USD): 30
- Early termination fee (USD): 10
- Contract Duration: 1 (Month selected)
- Payment due within: 30 Days
- Has end date:
- Visible to portals:

Below the main form is a 'Freemium' section with the following fields:

- Freemium: --Select--
- Freemium Unit: 0
- Freemium Duration: 0
- Freemium Duration Type: MONTH

A 'Publish New' button is highlighted with a red box in the top right corner of the form area.

Step 6: In this page, to configure the rate plan, fill in the following:

- Enter the **Rate Plan Name** in the textbox provided.
- Select the **Rate Plan Type** from the dropdown as, **Fees Only** or **Rate Card**.
- Audience dropdown is by default set to **Everyone**, if any other applicable you may select it.
- The **Start Date** is by default set to the current date.
- Scroll down and toggle the “**Has end date**” button to right, this will enable the end date field.
- Enter the **End Date** in the textbox provided.
- The **Currency** field is by default set to **\$ USD**, if any other currency available may change it.
- Set the Setup Fees by using the dropdown or entering manually, by default the fees is set to \$ USD 30.
- The **Early Termination Fees** is 10 (If the subscriber wishes to terminate the subscription prior to the set date, \$ 10 is applicable). See next page.

- The **Contract Duration** is set to 1 month, you can change it accordingly and also, allowed to change the duration from **Day** to **Month** to **Year** anytime.
- Set the **Payment due within**, by default it is set to 30 days.
- Set the **Visible to Portals** toggle button to right to enable it, if you wish to set the visibility of this rate plan for Portals.

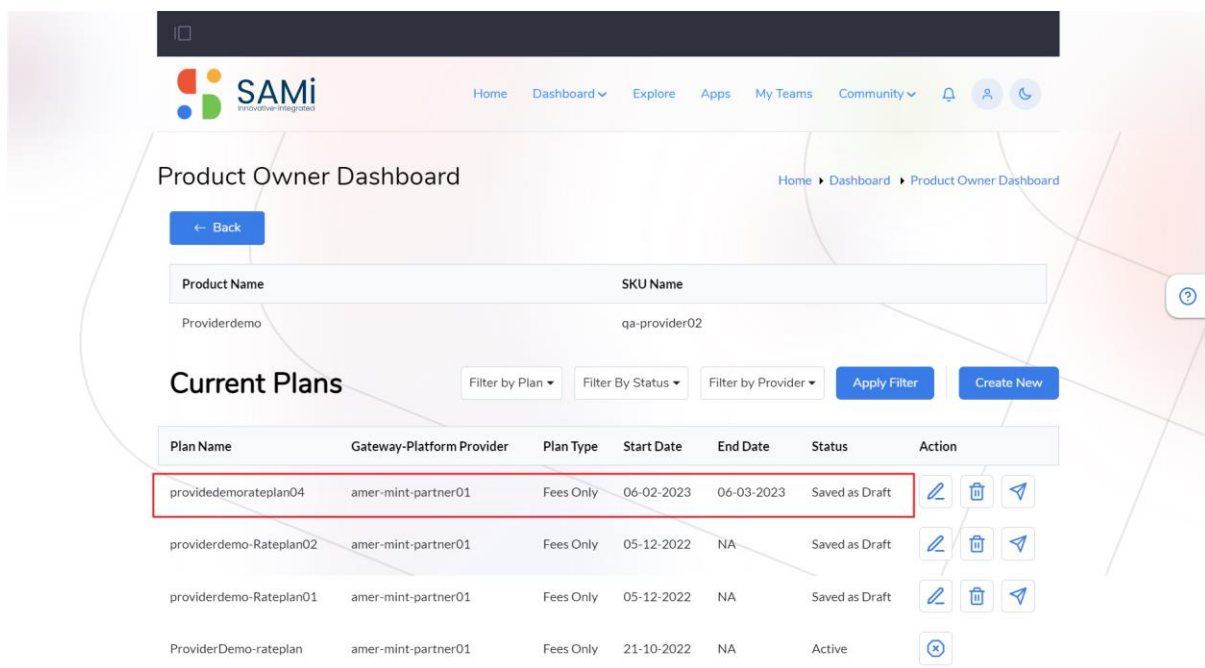
Freemium – Optionally, If you select any Freemium, you need to provide the details like, Freemium Unit, Freemium Duration, Freemium Type in respective entry boxes.

Step 7: Click **Publish**.

A success message appears stating, “Plan created successfully”.

Step 8: Navigate to Product Owner Dashboard, in Current Rate Plan page, you will view the newly created rate plan saved as Draft.

Note: If the Rate Plan is created first time, the Plan will be activated automatically.



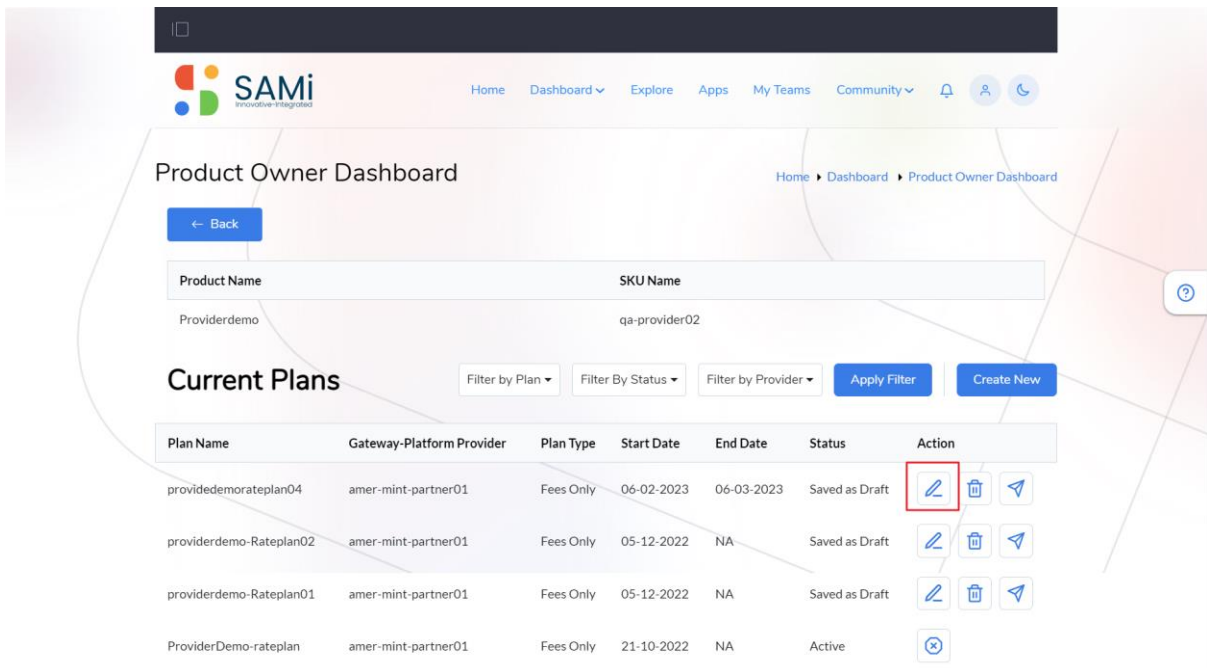
Edit Rate Plan

To edit an existing rate plan, do the following:

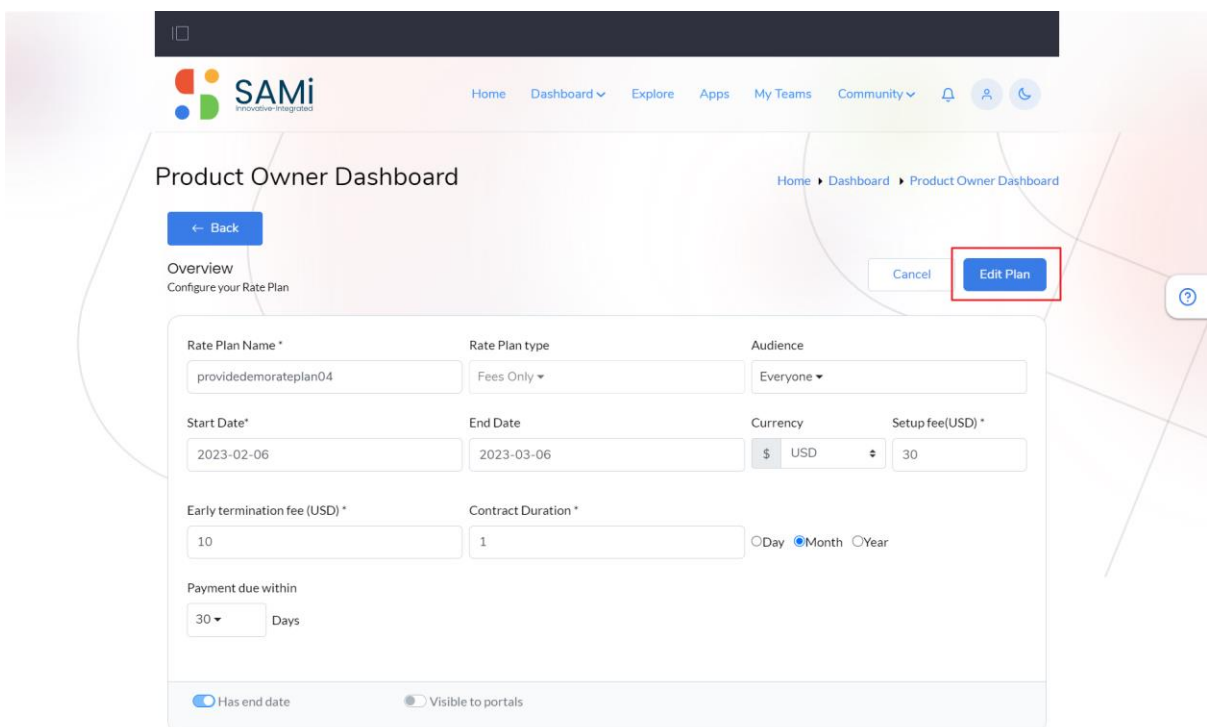
Step 1: In Product Owner Dashboard, Click on **Manage Plan** button on any rate plan card.

The Current Plans page appear.

Step 2: In Current Plans, select a Rate Plan and click on **Edit** Icon. See next page.



The Edit Rate Plan page is displayed.



Step 3: Make Necessary changes to the Rate Plan.

Step 4: Click on **Edit Plan**.

The existing rate plan is successfully updated.

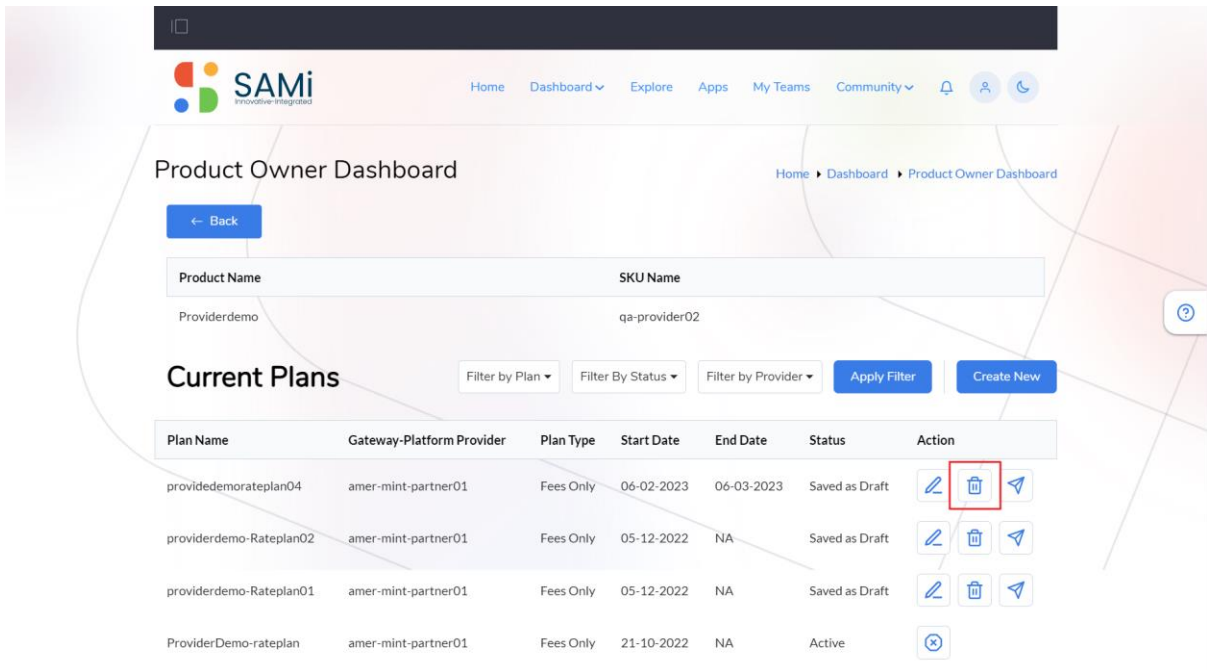
Delete a Rate Plan

To delete an existing rate plan, do the following:

Step 1: In Product Owner Dashboard, Click on **Manage Plan** button on any rate plan card.

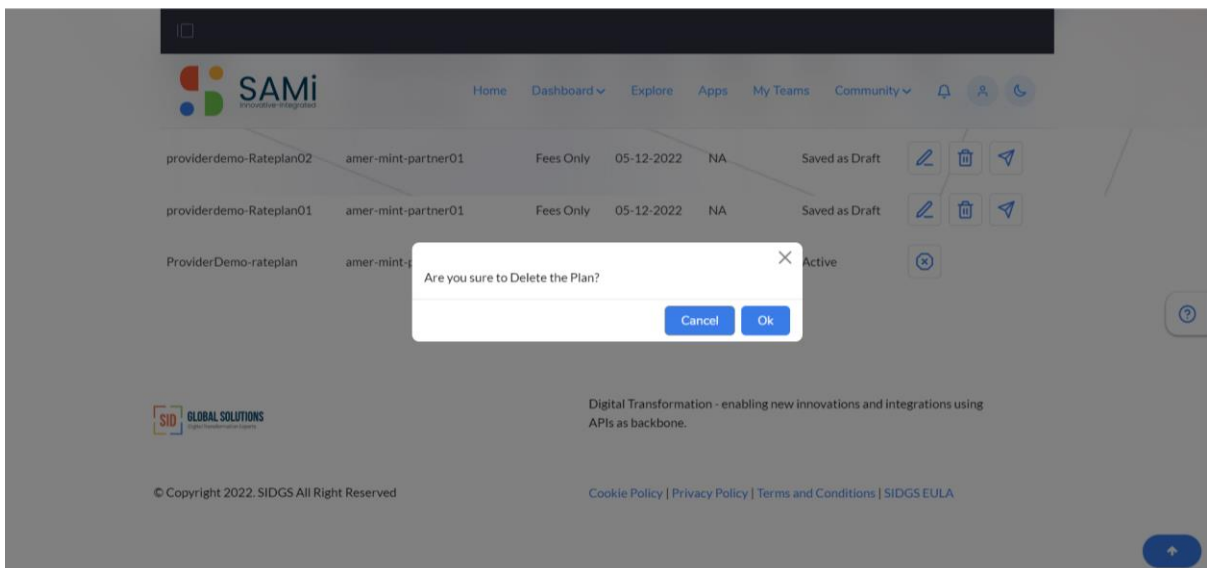
The Current Plans page appear.

Step 2: In Current Plans, select a Rate Plan and click on **Delete** Icon.



A Delete confirmation dialog box appears stating, Are you sure to Delete the Plan?

Step 3: Click **Ok** to delete the plan.



The selected plan is deleted, and it will no longer be available in current plan page.
Step 4: Click **Cancel**, if you wish to abort the cancel operation.

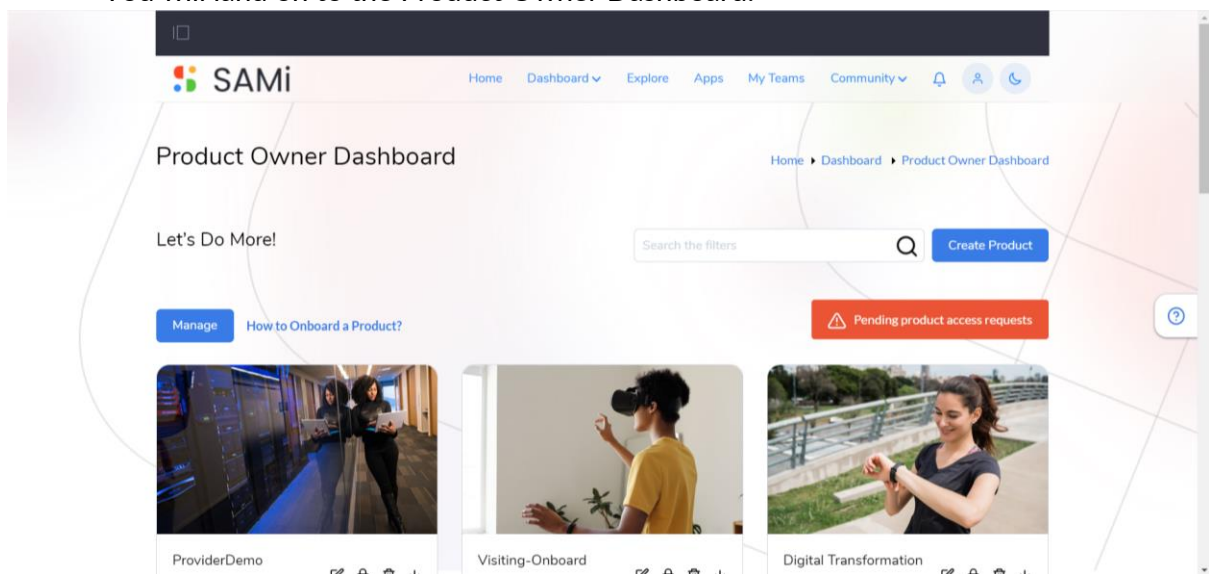
Filter Rate Plans from Current Plan page

The Product Owner will be allowed to Filter Rate Plan in main menu.

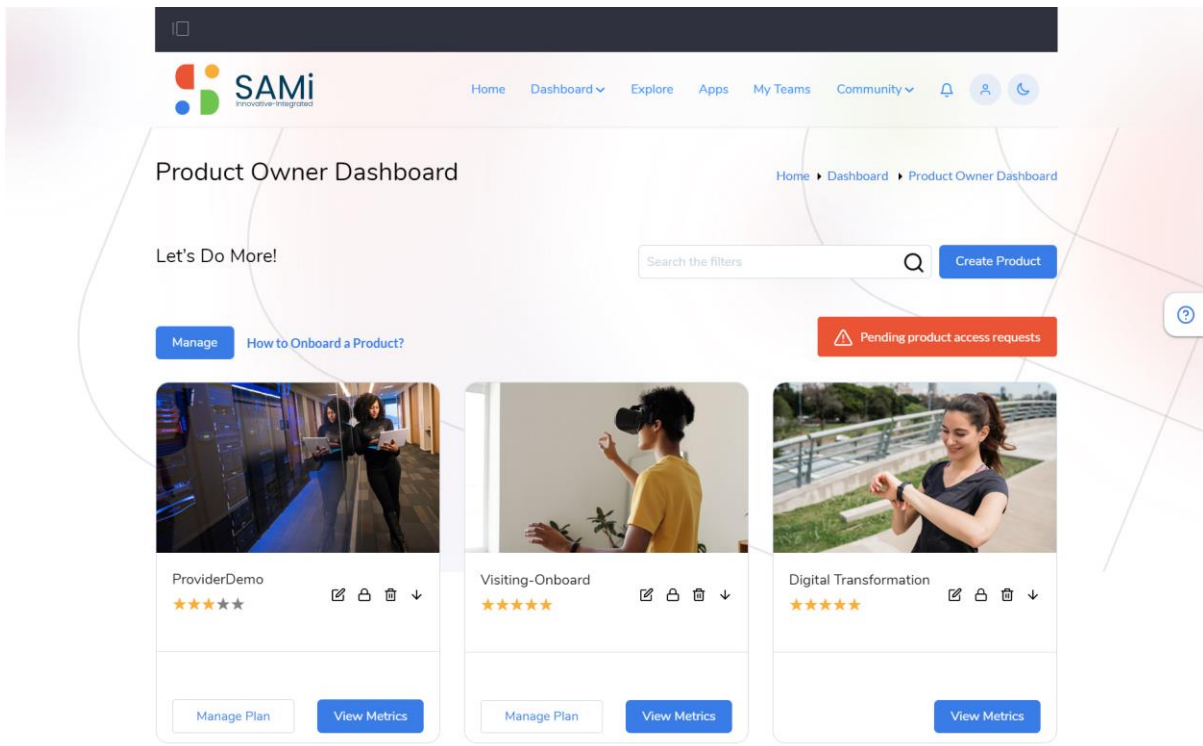
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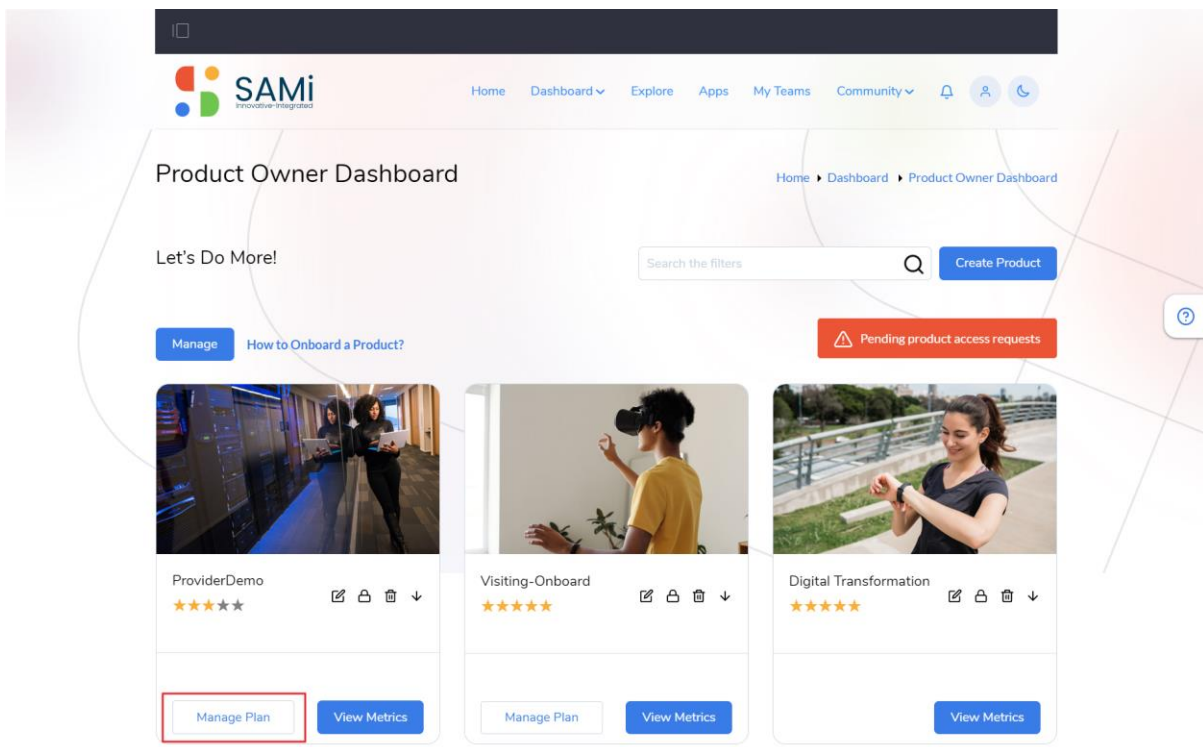
You will land on to the Product Owner Dashboard.



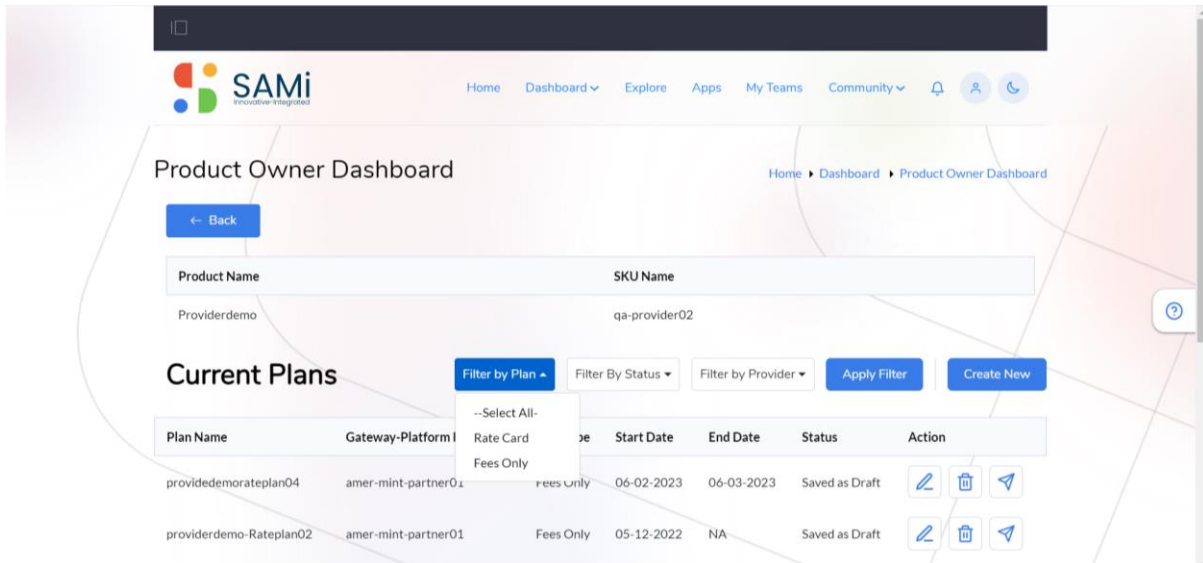
Step 3: The Product Owner will be able to Manage Rate Plans by navigating and clicking **Dashboard** and then **Product Owner Dashboard** option. See next page.



Step 4: In the Product Owner Dashboard, click **Manage Plan** button on any card to filter the rate plans.

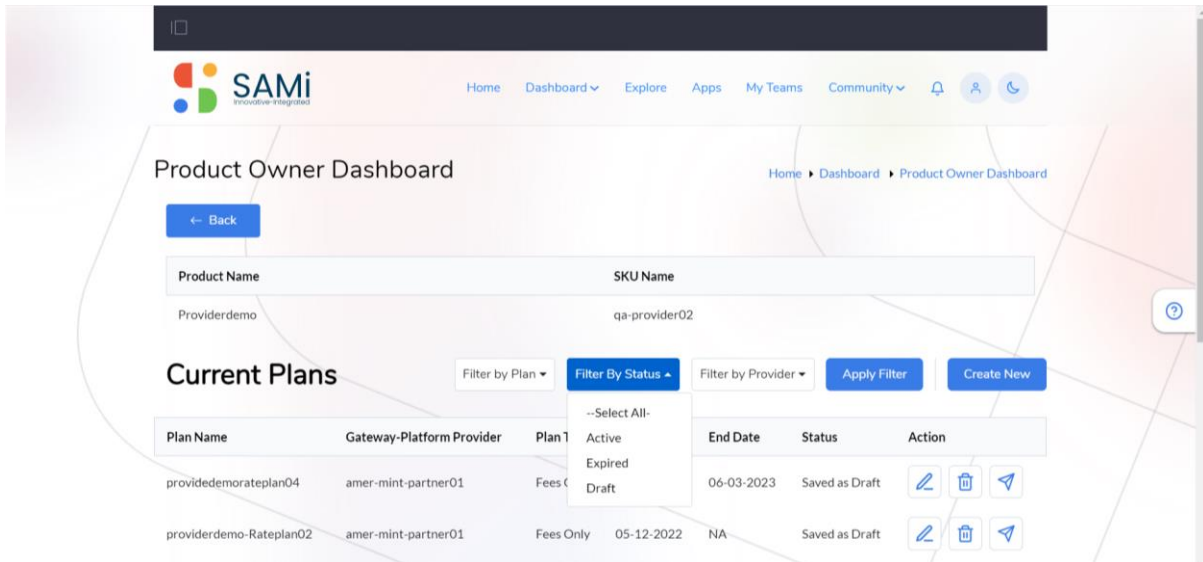


The Product Owner Dashboard with the list of Current Plans appears. See next page.

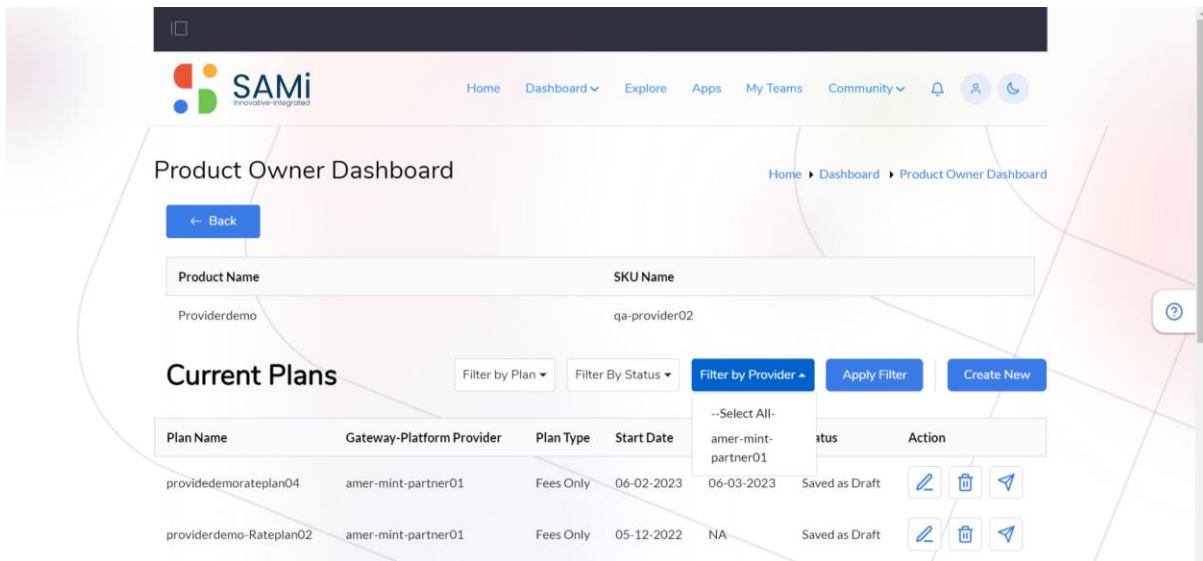


Filter by Plan: In this filter option the PO will be able to filter the plans based on Plan selection as **Rate Cards** or **Fees Only** option.

Filter by Status: In this filter option the PO will be able to filter the plans based on Status selection as **Active**, **Expired** or **Draft** option.



Filter by Provider: In this filter option the PO will be able to filter the plans based on Provider selection as **Select All** or a current provider. See next page.



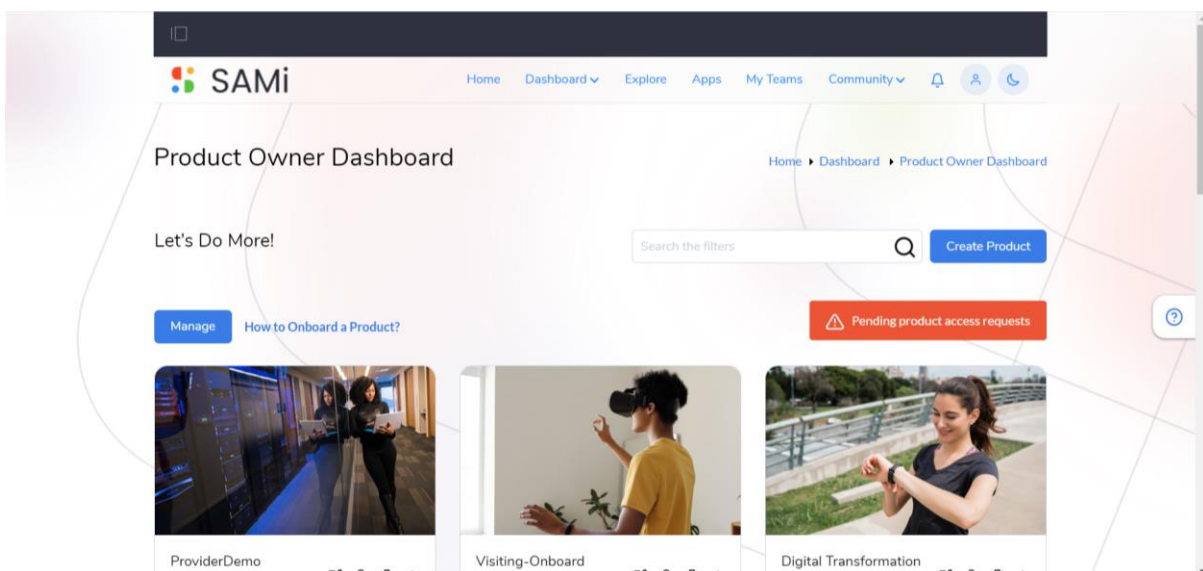
Publishing a Rate Plan

To publish a rate plan, follow the procedure:

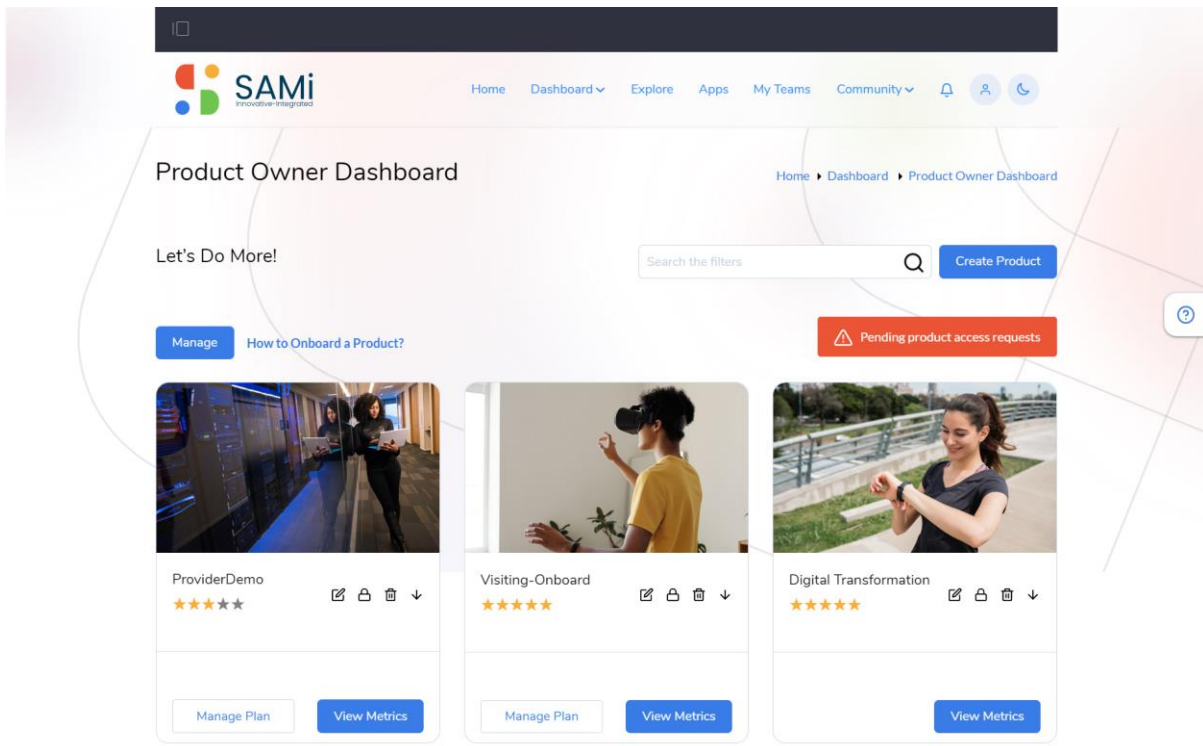
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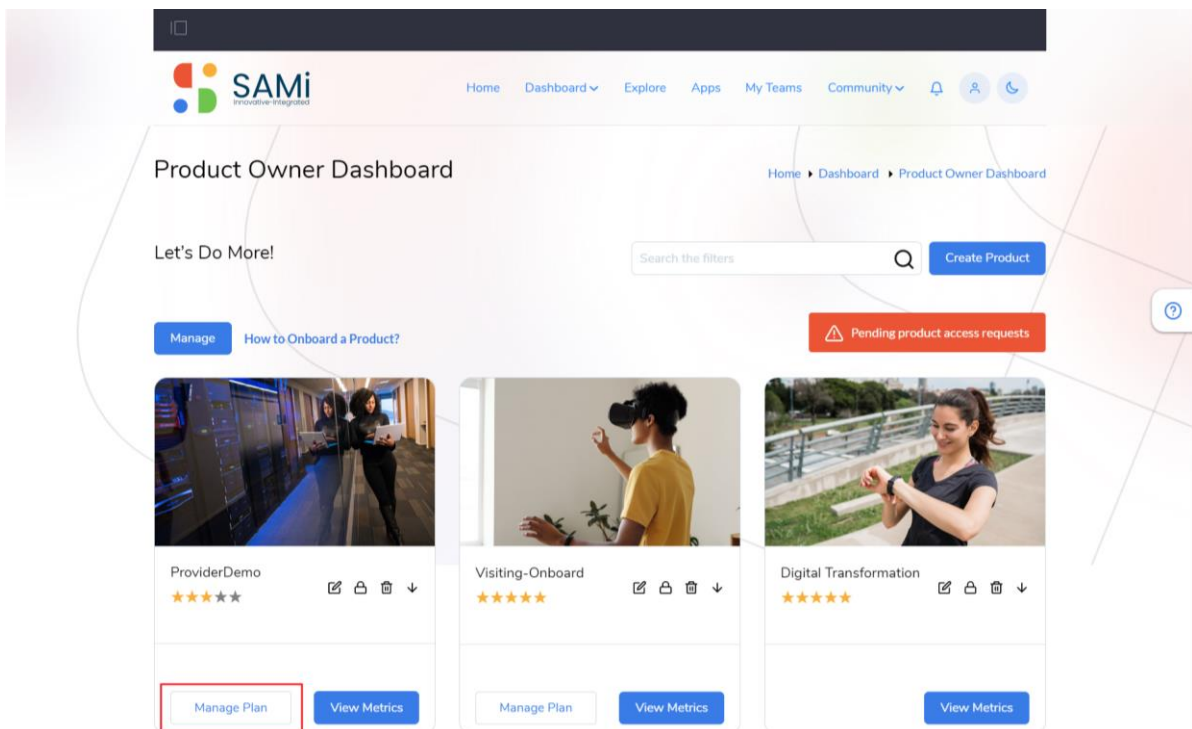
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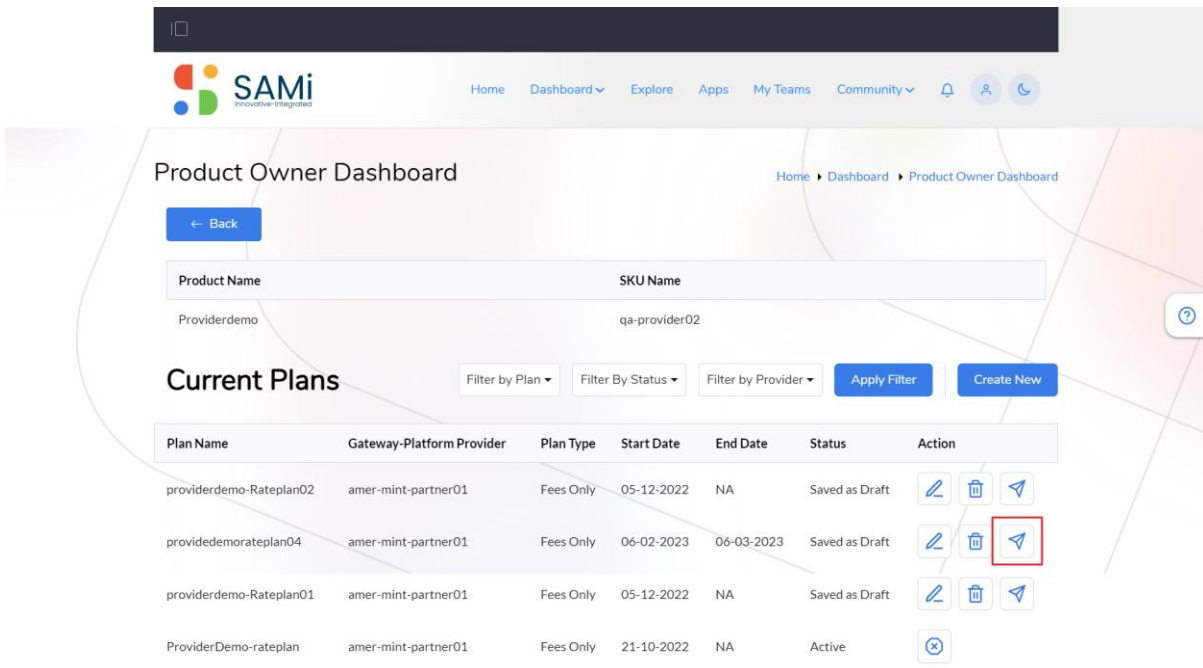
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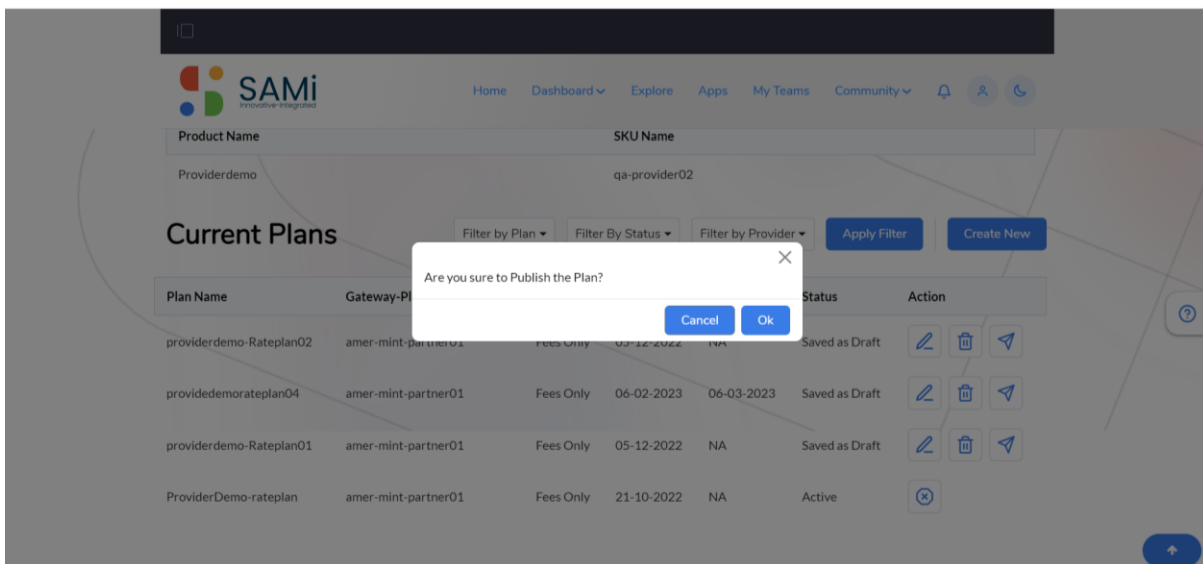


The Product Owner Dashboard with the list of Current Plans appears. See next page.



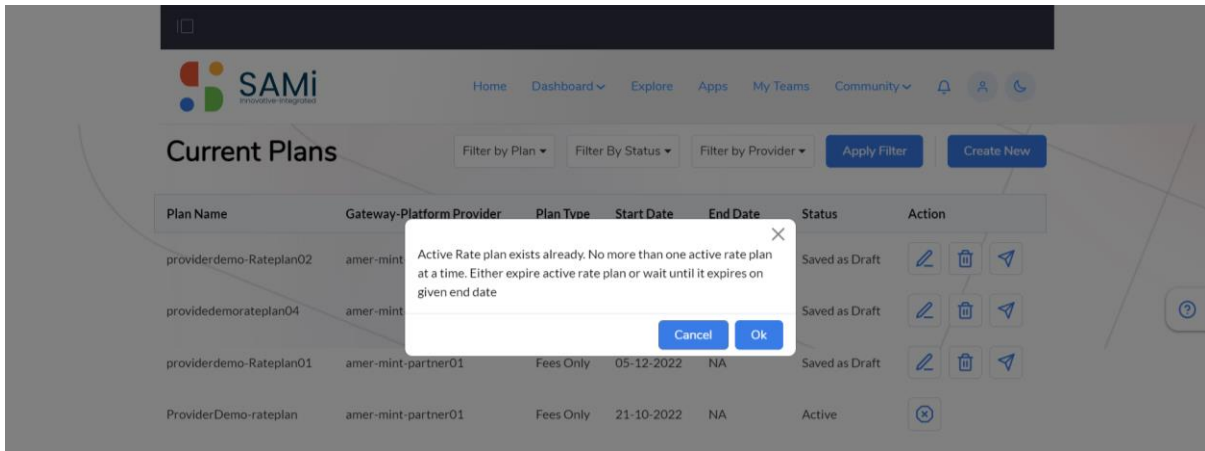
Step 5: In Current Plans page, click on the **Publish** Icon.

A confirmation message appears, “Are you sure to Publish the Plan”.



Step 6: Click **Ok** to publish the rate plan.

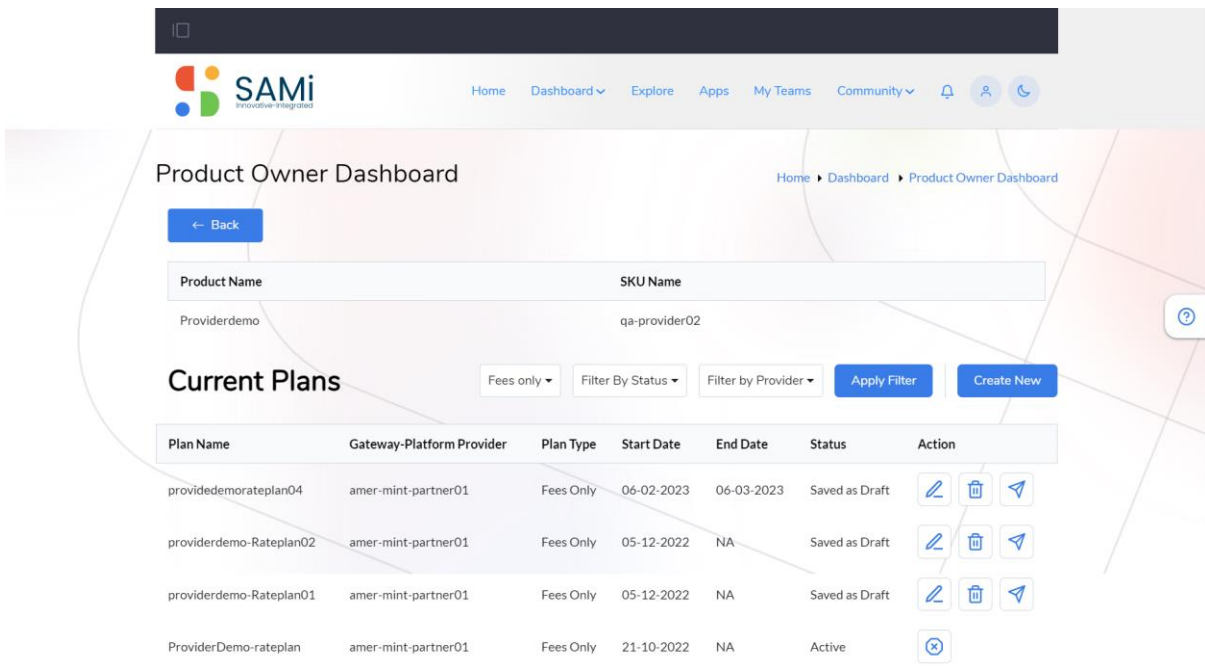
Note: If No Rate Plans are Active (Current Rate plan is Expired) it will be published. Otherwise, a message is displayed stating, “Active Rate Plan exists already. No more than one active rate plan at a time. Either expire active rate plan or wait until it expires on given end date”. See next page.



Expiring a Rate Plan

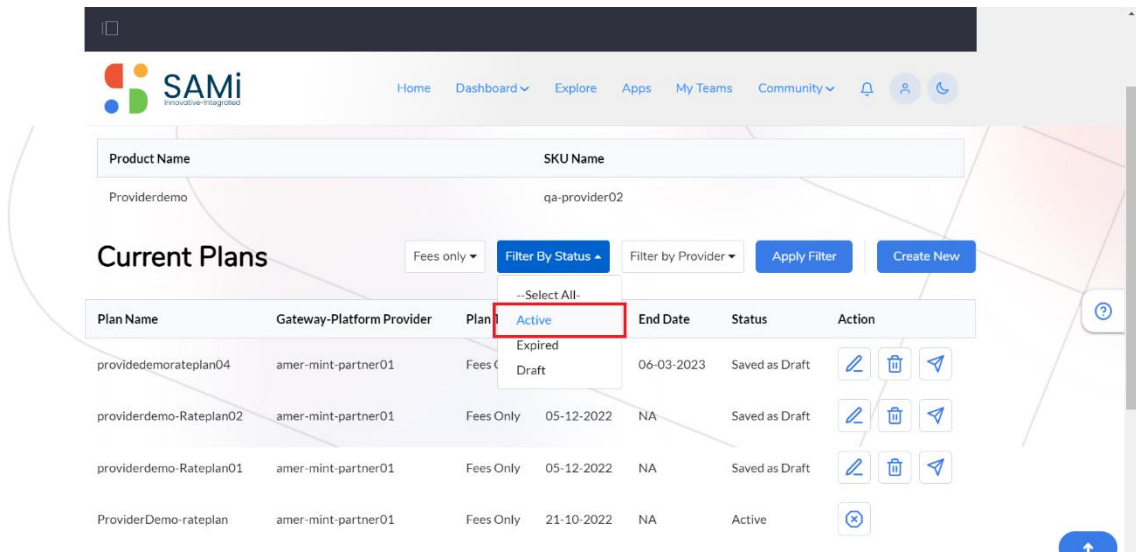
To expire a rate plan, the rate plan has to be active, the Product Owner is allowed to search using the filter option and expire a rate plan.

Step 1: To expire an active rate plan navigate to Current Plan page.

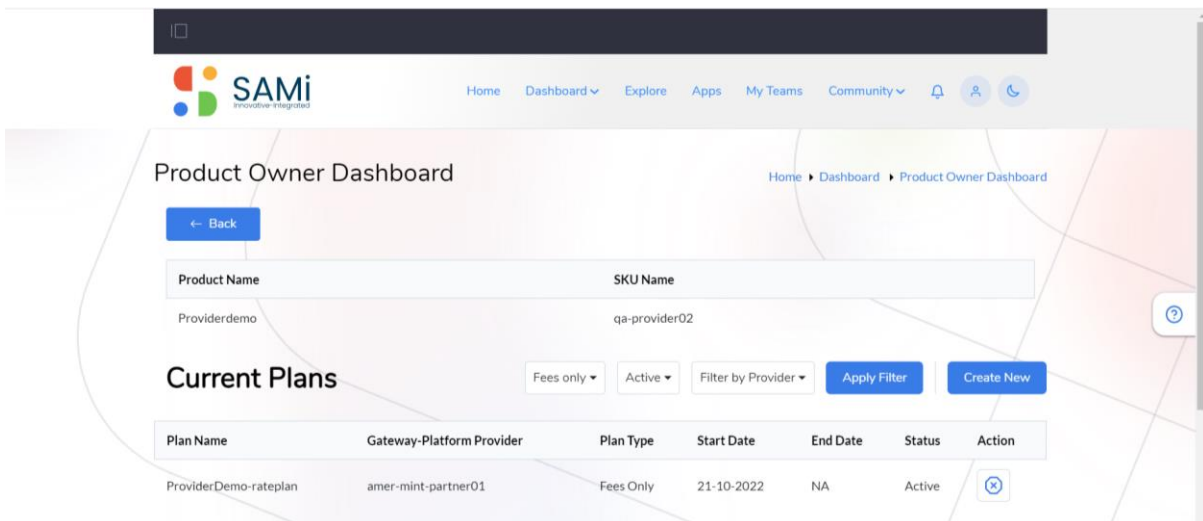


Step 2: Search for an active rate plan as a PO, if you would like to expire it. Use the Filter By **Status** option to filter the rate plan as per **Active** status. Click **Apply Filter** button.

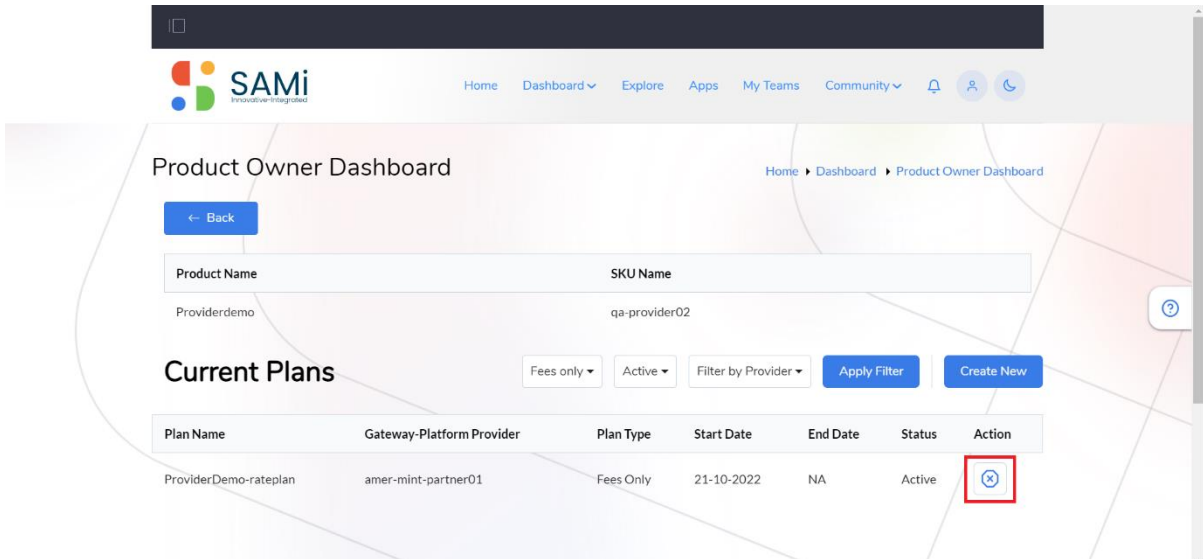
See next page.



The Active rate plans appear in the Current Plan page. See next page.

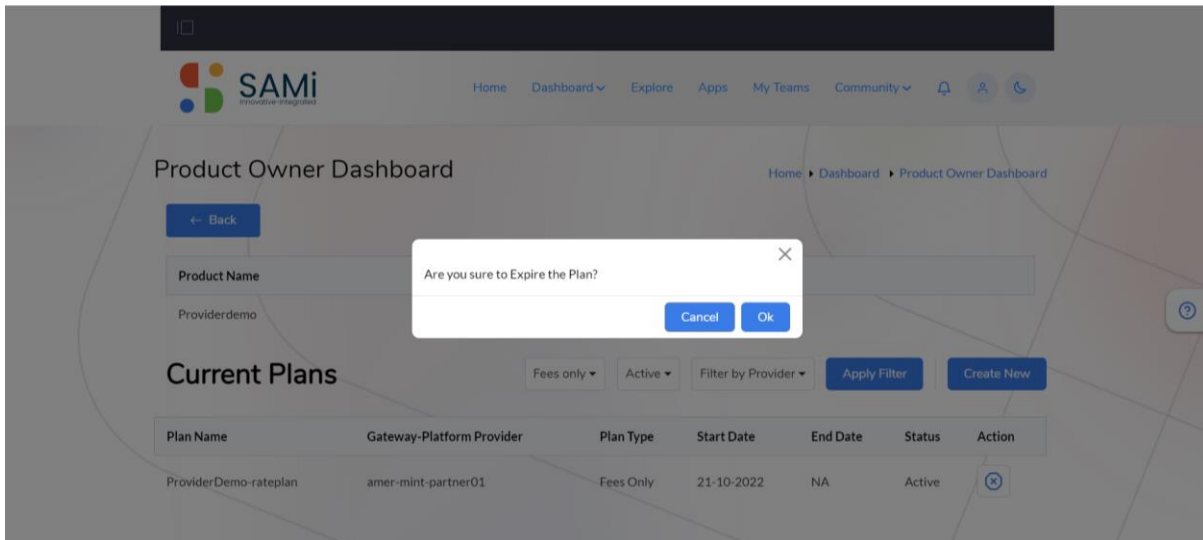


Step 3: Click on **Expire Plan** Icon. See next page.



A confirmation message appears stating, “Are you sure to expire the Plan”.

Step 4: Click **Ok** to expire the plan.

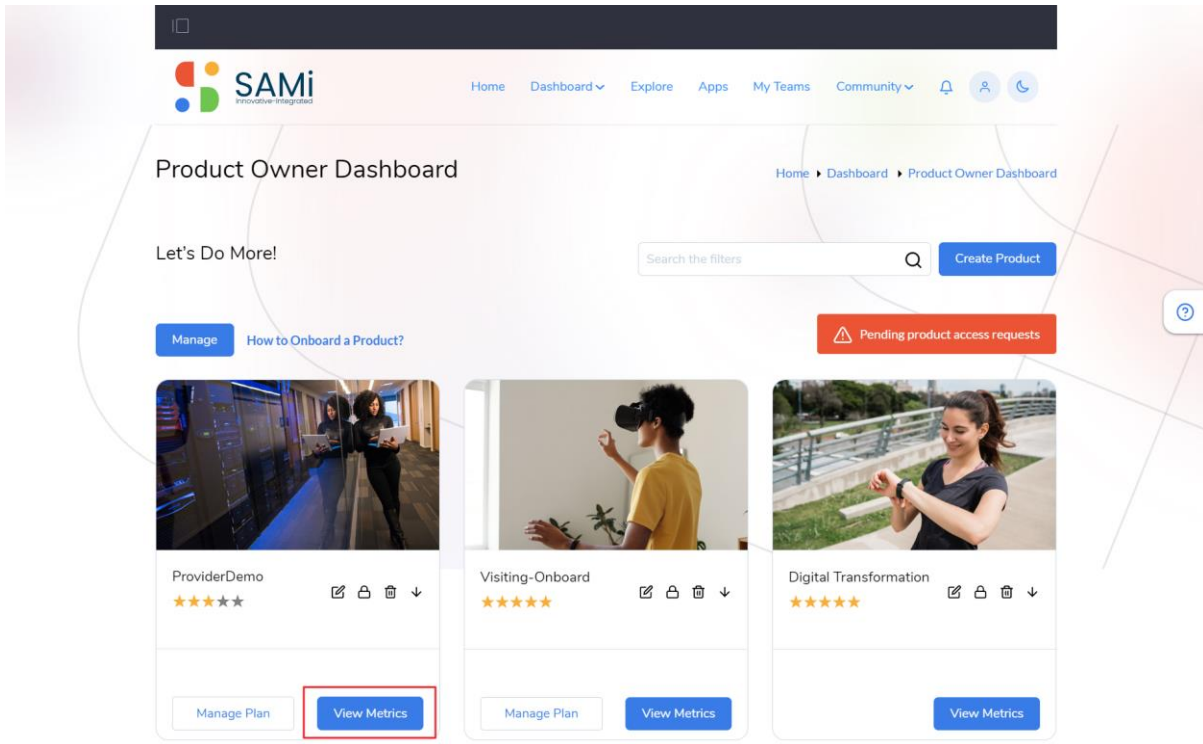


Step 5: Click **Cancel** to abort expiring a plan.

Note: After Clicking the Expiring Plan, it will take **24Hours** to Expire the Current Plan.

View User Metrics

The Product owner will also be able to view the product Metrics. Clicks **View Metrics**.



The Product metrics page appears.

The Product Metrics includes: No of Apps for the Product, Teams Subscribed, Developers Subscribed, and Product Rating.

