Using Tiered Pricing with Share Plan Add-Ons

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Overview

Share plan add-ons let you sell additional usage or allowance for an existing share plan. Tiered pricing can be used on these add-ons so the add-on charge can vary by threshold instead of using one flat amount.

This is useful when you want an account to keep its shared usage model, but price optional add-on usage differently as the purchased or consumed amount increases.

Common examples include:

- adding extra data to a shared data pool,
- adding extra minutes to a shared voice plan,
- selling a discounted larger add-on quantity,
- using different prices for low-volume and high-volume add-on purchases,
- or applying a structured add-on price while keeping the base share plan unchanged.

Before You Begin

You need:

- access to Product Catalog setup,
- access to the account Share Plan screen,
- an existing share plan,
- a share plan add-on service,

- a share plan add-on package that contains that service,
- a usage bucket suitable for the add-on service,
- and at least one package frequency with pricing configured.

Important: tiered pricing is available for share plan add-on packages. The share plan package itself remains separate and is not configured as a tiered add-on package.

Create or Confirm the Share Plan Add-On Service

1. Go to `Setup > Product Catalog > Services`.
2. Create or open the service that will be used for the add-on.
3. Mark the service as a `Share Plan Add-On`.
4. Choose the appropriate service type and billing status.
5. Add the usage bucket that represents the add-on allowance.
6. Save the service.

Share plan add-on services are usage-based and should have one add-on usage bucket. Buckets with overage rate plans are not used for this add-on service setup.

Create the Share Plan Add-On Package

1. Go to `Setup > Product Catalog > Packages`.
2. Create or open the package that will be sold as the add-on.
3. Set the package category to `Share Plan Add-On`.
4. Add the share plan add-on service to the package.
5. Configure the package settings that apply to your offer, such as name, active status, price book, currency, and frequency.
6. Save the package.

The package should contain the share plan add-on service that contributes the extra allowance to the account share plan.

Configure Tiered Pricing on the Add-On Package

1. Open the share plan add-on package.
2. Open the package frequency you want to price.
3. Select the relevant pricing tab:
   - `Recurring` for recurring add-on charges.
   - `One Time` for non-recurring add-on charges.
4. Find the add-on service charge.
5. Open `Edit Charges`.
6. Select the tiered pricing type:
   - `Tiered - Bracket Pricing`
   - `Tiered - Progressive Pricing`
7. Select the charge type:
   - `Fixed Amount`
   - `Percentage`
8. Add the tier thresholds and amounts.
9. Make sure the final tier covers usage above the last defined threshold.
10. Save the charge setup.
11. Save the package frequency.

The available tier options depend on the package frequency and counting rule setup. If a tiered option cannot be saved, review the package frequency, counting rule, and package billing settings.

For bracketed tiered pricing, configure the add-on price with a counting rule that counts up across the account. This lets the tier thresholds evaluate against the account-level usage total for the add-on pricing scenario.

Default Pricing and Price Overrides

When a share plan add-on is added to an account, the add-on can use either catalog pricing or an account-specific price override.

For both recurring and non-recurring add-ons, a price can optionally be provided when the add-on is added:

- If a price is provided, that price is used as the add-on price for the account.
- If no price is provided, the system uses the matching catalog price.

The matching catalog price is selected using:

- the account currency,
- the share plan's Selling Package Price Book,
- and the billable service status.

The service status used at the time the add-on is added is the add-on service's default service status. When the add-on is loaded later, pricing is shown using the add-on's current service status.

In the UI, recurring and non-recurring share plan add-on prices can be treated as either catalog prices or price overrides. If the default price is not changed, it is treated as catalog pricing, not as an override. An override is created only when the add-on price is changed for that account.

Add the Tiered Add-On to an Account Share Plan

1. Go to the customer account.
2. Open `Share Plans`.
3. Select the share plan that should receive the add-on.
4. Open the `Add Ons` tab.
5. Confirm the price book.
6. Select the share plan add-on package.
7. Select the package frequency.
8. Click `Add`.
9. Review the add-on charge.
10. Save the account share plan.

The add-on price book must be the same as the share plan's Selling Package Price Book. The UI uses that price book when finding available add-on packages and matching catalog prices.

When the selected add-on package uses tiered pricing, the add-on charge displays as `Tiered Pricing` instead of a single amount. Open the pricing detail to review the configured tiers.

Override Add-On Pricing for One Account

You can override the add-on price for a specific account when that account should use pricing different from the catalog.

1. Open the account share plan.
2. Go to the `Add Ons` tab.
3. Expand the add-on package.
4. Open the pricing detail.
5. Update the amount, tiers, or tier amounts as needed.
6. Save the account share plan.

The override applies to that account share plan add-on only. It does not change the catalog price for other accounts. If the displayed default price is left unchanged, the add-on continues to use catalog pricing.

Update Tiered Add-On Pricing Later

Use package price records when you need to change add-on pricing for future effective dates.

1. Open the share plan add-on package frequency.
2. Open the service price records for the recurring or one-time charge.
3. Select the price record you want to update.
4. Open `Edit Charges`.
5. Update the tier structure or tier amounts.
6. Save the price record.

Use this approach when pricing should change from a specific date while preserving earlier pricing history.

Example

A provider sells a shared monthly data plan. Customers can buy extra shared data as an add-on.

The provider creates a share plan add-on package with recurring tiered pricing:

Tier	Threshold	Monthly add-on charge
1	0 GB	$20
2	10 GB	$35
3	25 GB	$70

The add-on package is then added to a customer account share plan. The customer receives the additional shared allowance, and the add-on charge follows the configured tiered price.

Tips

- Use share plan add-ons when the extra allowance should contribute to an existing share plan.
- Use clear package and service names so account users can identify the add-on quickly.
- Confirm the add-on service has the correct usage bucket before pricing the package.
- Review both recurring and one-time pricing if the package uses both charge types.
- Keep the add-on price book aligned with the share plan's Selling Package Price Book.
- Use account-level overrides only for customer-specific pricing exceptions.
- Use price records for scheduled catalog price changes.

Troubleshooting

Issue	What to check
The add-on package is not available on the account share plan	Confirm the package category is `Share Plan Add-On`, the package is active, the price book is available, and the package has an active frequency.
The add-on service cannot be saved	Confirm it is marked as `Share Plan Add-On` and has one valid usage bucket.

Issue	What to check
Tiered pricing cannot be saved	Review the package frequency, counting rule, and package billing settings. Some tier types require specific frequency or counting-rule configuration.
The account shows a single amount instead of tiered pricing	Confirm the catalog charge is set to `Tiered - Bracket Pricing` or `Tiered - Progressive Pricing`, then refresh the account share plan add-on.
The wrong price appears on the account	Check whether the account has a price override. If it does, the account-specific tiers take precedence over the catalog tiers.
No catalog price is found	Confirm the add-on package has pricing for the account currency, the share plan's Selling Package Price Book, and a billable service status.
The price book does not match	Use the same price book as the share plan's Selling Package Price Book when adding the share plan add-on.

Result

After setup is complete, customers can use share plan add-ons with tiered recurring or one-time pricing. The add-on continues to contribute to the selected account share plan, while the charge can follow a threshold-based pricing model.