Counting Rules Screen

Product Catalog · https://learn.logisense.com/docs/590381233/

Last verified with: 10.8.6.0

Counting Rules are configured in Setup / Product Catalog / Package / Counting Rules

Overview

Counting Rules are used when pricing needs to change based on how many qualifying packages or services exist on an account. Instead of applying the same charge to every unit, a counting rule lets the system total the matching items on the account and then apply tiered pricing based on that count.

This is commonly used when volume-based pricing depends on the number of subscribed services or packages rather than on usage volume alone. For example, the first range of services on an account may be billed at one price, and higher counts may move pricing into a lower-cost tier.

A counting rule can be configured to count either:

- packages
- services

Once the rule is created, it can be selected on package frequency pricing and on usage-rate pricing where tiered pricing should react to the calculated count.

Prerequisites

- Services should already exist if the rule will count services.
- Packages should already exist if the rule will count packages.
- The package frequencies or tiered rates that will use the rule should already be understood, since the counting rule only defines what is counted.

Counting Rule Panel

The Counting Rule panel on the left displays the available counting rules. Selecting a rule loads its details on the right so you can review or update it.

The list helps you quickly identify each rule by showing:

- **Name**, which is the rule name
- **Applies To**, which indicates whether the rule counts packages or services
- **Pricing Model**, which shows how status-based pricing is handled

Actions

Icon	Description
	Deletes the selected counting rule if not in use
	Adds a new counting rule

Edit Counting Rules Panel

The Edit Counting Rules panel displays the selected rule and is where the rule is configured.

Fields

- **Name**: The name of the counting rule. Use a name that clearly identifies what is being counted and where the rule is intended to be used.
- **Active**: Controls whether the counting rule is available for selection on other screens. Inactive rules remain on this screen for review but are not offered for new configuration.
- **Applies To**: Determines whether the rule counts **Package(s)** or **Service(s)**. A single rule can count one type only.
- **Status Pricing**: Determines how counted statuses are interpreted when the rule is used with tiered pricing. This setting controls whether pricing is considered across all selected statuses together or separately by status.

- **Count only if Usage**: When enabled, the qualifying package or service is counted only when usage has occurred for it in the billing period.

Package(s) Tab

The **Package(s)** tab is available when **Applies To** is set to **Package(s)**. Use this tab to define which package frequencies and statuses should contribute to the count.

Add Controls

- **Select Package**: Choose the package whose frequencies should be made available for selection.
- **Select Frequency**: Choose one or more frequencies from the selected package. Only frequencies from the chosen package are available here.
- **Select Status**: Choose one or more package statuses that should be counted for the selected frequencies.
- **Add**: Adds every selected frequency and status combination to the rule.

Package List

After package rows are added, the list on this tab shows:

- **Package**: The package that contributes to the count.
- **Package Frequency**: The specific frequency within that package that is counted.
- **Package Status**: The account package status that must apply for the package frequency to be included in the count.

Use the delete control on a row to mark that package-frequency-status combination for removal.

Service(s) Tab

The **Service(s)** tab is available when **Applies To** is set to **Service(s)**. Use this tab to define which service statuses should contribute to the count.

Add Controls

- **Select Service**: Choose the service that should be counted.

- **Select Status**: Choose one or more service statuses that should be counted for the selected service.
- **Add**: Adds the selected service-status combinations to the rule.

Service List

After rows are added, the list on this tab shows:

- **Service**: The service that contributes to the count.
- **Service Status**: The service status that must apply for the service to be included in the count.

Use the delete control on a row to mark that service-status combination for removal.

References Tab

The **References** tab shows where the selected counting rule is already used. This is helpful when reviewing the impact of a change or when determining whether the rule can be deleted.

The tab can be used to confirm whether the rule is referenced by package pricing, usage-rate pricing, or other related configuration.

Guides

Adding Counting Rules

- In the Counting Rule panel, click the add icon.
- Enter the rule details in the Edit Counting Rules panel.
- Set **Applies To** to either **Package(s)** or **Service(s)**.
- If you are counting packages, open the **Package(s)** tab, select a package, select one or more frequencies, select one or more statuses, and click **Add**.
- If you are counting services, open the **Service(s)** tab, select a service, select one or more statuses, and click **Add**.
- Click **Save**.

Editing Counting Rules

- In the Counting Rule panel, select the rule you want to update.
- Edit the main rule fields as needed.
- Open the applicable tab and add or remove package or service rows as required.
- Click **Save** when you are finished.

Deleting Counting Rules

Note: Counting rules that are configured on package frequencies or rates are in use and cannot be deleted. In order to delete a counting rule in use, first determine which entities are configured with the rule using the '*References*' tab and then edit those entities to no longer use the rule.

- Select the counting rule in the list.
- Review the **References** tab if you need to confirm where it is in use.
- Click the delete icon.
- On the confirmation dialog, click **Yes**.