

Sales Contract Subscription and Recurring Invoice

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1.1.1

Prepared By :

Probuse Consulting Service Pvt. Ltd.

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Flow of Sales Contract Subscription and Recurring Invoice

1.1 Sales Quote / Sale Order

- **First we create a subscription/warranty product(s) in Odoo Standard Product Menu.**

- Then create a Quotation Template to use in sales order (Odoo Standard feature).
- Now we create quotations for any warranty/subscription kind of product(s) and we can also use this Quotation Template and subscription/warranty Product and we can also add products which are not set as subscription/warranty products (for example installation charge, travel cost, etc etc).
- Add a recurring period it will define when your next recurring invoice is created for this sales order.
- When we select the Quotation Template it will automatically add subscription/warranty products in the Sale Order Line. [You still can add manual sales order lines].
- Here we don't have an Analytic Account / Contract / Subscription so when we confirm the sale order it will automatically create an analytic account/Sale Contract / Subscription and set it as reference here on sales order form.
- We can see here an Analytic Account / Contract / Subscription is created and set.
- We can see analytic accounts / subscriptions of customers in the Contract menu in the sale section.
- Subscription/Warranty product lines are separated in the Contract Lines tab and sale order lines are in the Sale Order Lines tab.
- Accounting Journal will be used to create invoices on contract form.

- Here we created an invoice for a subscription/warranty product.

1.2 Existing Contract / Analytic Account / Subscription on Sale Order Form

- Now we want to add a new product or subscription/warranty into existing subscription/contracts of customers so that we can process.
- For this we select an Analytic Account where we want to add advanced service / Additional product of subscription (upsell).
- If we select an analytic account then it will add lines to existing subscription/analytic contracts and not create new contracts.
- Here there are no lines added in the contract because the selected product is not a Subscription/Warranty product.
- Here if we select a Subscription/Warranty product then it will process for contract update or create.
- Now we add a new subscription/warranty product line in Quotation.
- We select analytic accounts and subscription/warranty products so it will be processed for a contract.

- Here we can see a new subscription/warranty line is added in the existing contract.
- If we want to lock the contract then we are able to do it by “Lock” Button and the same Unlock process.
- We show a PDF report for the contract.

Create Contracts

1. Manual Process to Generate Invoice directly from Subscription / Contract menu and Generate Invoice Button

- From the generate invoice button we can create an invoice from the Contract menu.

2. Manual Process to Generate Recurring Invoices Wizard in Single Click

- From generating recurring invoice menus we can create invoice.
- This wizard will search for all Contracts / Subscriptions which are going to expire on a selected date on wizard.

3. Automatic Create Customer Invoice/Bill using Cron Job for Subscription

- Cron will search for all Contracts / Subscriptions which have "Date of Next Invoice" equal to Today date and create an invoice for that contract.