**Sales Contract Subscription and Recurring Invoice**

**Document Version :**

1.1.1

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**Sales Contract Subscription and Recurring Invoice**

**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.**