



ORACLE  
NETSUITE

# SuiteBilling

---

2022.2

January 25, 2023



Copyright © 2005, 2022, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

**U.S. GOVERNMENT END USERS:** Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

If this document is in public or private pre-General Availability status:

This documentation is in pre-General Availability status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

If this document is in private pre-General Availability status:

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your pre-General Availability trial agreement only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described in this document may change and remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

### **Documentation Accessibility**

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <https://www.oracle.com/corporate/accessibility>.

### **Access to Oracle Support**

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

### **Sample Code**

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided "as is" and "as available", for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at [www.netsuite.com/tos](http://www.netsuite.com/tos).

Oracle may modify or remove sample code at any time without notice.

### **No Excessive Use of the Service**

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer's use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle's other customers, Oracle may slow down or throttle Customer's excess use until such time that Customer's use stays within reasonable limits. If Customer's particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer's actual usage pattern.

### **Beta Features**

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or "commercial computer software documentation" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

This documentation is in pre-General Availability status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your pre-General Availability trial agreement only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

# Send Us Your Feedback

We'd like to hear your feedback on this document.

Answering the following questions will help us improve our help content:

- Did you find the information you needed? If not, what was missing?
- Did you find any errors?
- Is the information clear?
- Are the examples correct?
- Do you need more examples?
- What did you like most about this document?

Click [here](#) to send us your comments. If possible, please provide a page number or section title to identify the content you're describing.

To report software issues, contact NetSuite Customer Support.

# Table of Contents

SuiteBilling Overview .....	1
SuiteBilling Terminology .....	1
SuiteBilling Process Diagrams .....	2
Subscription Plan Creation .....	2
New Stand-Alone Subscription Creation .....	3
Subscription Creation from a Sales Order .....	4
Renew and Extend a Subscription from a New Subscription Record .....	6
Renew a Subscription with a New Subscription Record .....	6
SuiteBilling Roles and Permissions .....	7
SuiteBilling Change Orders .....	9
Maximum Values in SuiteBilling .....	10
Decimal Precision in SuiteBilling .....	11
Revenue Recognition for SuiteBilling .....	11
Revenue Recognition Rules for SuiteBilling .....	12
Calculations for Revenue Plans Created on Subscription Events .....	13
Revenue Allocation for One-Time and Recurring Subscription Lines .....	15
SuiteBilling Setup .....	18
Setting the SuiteBilling Preferences .....	18
Enabling SuiteBilling Features .....	19
Optional Preferences for SuiteBilling .....	19
Enabling the Multi-Subsidiary Customer Feature for SuiteBilling .....	23
Creating Items for Subscription Plans .....	23
Class, Department, and Location Fields on Subscription Lines .....	24
Configuring Subscription Items for Revenue Recognition .....	25
Creating Subscription Plans .....	26
Creating Price Books .....	28
Creating Price Plans .....	32
Time-Based Pricing .....	34
Creating Billing Accounts .....	36
Renaming SuiteBilling Records .....	39
SuiteBilling Management .....	41
Creating a New Stand-Alone Subscription .....	41
Creating a Subscription from a Transaction .....	44
Updating a Subscription on a Transaction .....	45
Using Item Records .....	46
Activating Subscription Line Items .....	46
Adding Line Items to an Existing Subscription .....	47
Charges Based on a Fixed Amount .....	49
Modifying the Class, Department, or Location of a Subscription Line .....	50
Changing a Subscription Line's Status on a Subscription Record .....	50
Removing an Add-On Item .....	50
Activating a Subscription .....	51
Creating Usage Records .....	51
Voiding a Usage Record .....	52
Managing Rating Runs .....	53
Applying Discounts to Subscriptions .....	56
SuiteBilling Subscription Revisions .....	56
Viewing Subscription Revisions .....	56
Clearing Revisions .....	58
Voiding a Change Order .....	58
Viewing a Voided Change Order .....	59
Change Order Type-Specific Revenue Impacts .....	59
Terminating a Subscription Line Item .....	59

Suspending a Subscription Line Item .....	60
Reactivating a Subscription Line Item .....	60
Removing One-Day Charges .....	61
Modifying Pricing .....	63
Closed Subscriptions .....	64
Renewing a Subscription .....	64
Adding Renewal Information to Subscription Plans .....	67
Deleting a Subscription .....	67
SuiteBilling Reports .....	69
Monthly Recurring Revenue Report .....	69
Total Contract Value Report .....	69
Billings To Date Report .....	70
Churn By Customer Report .....	70
Churn By Revenue Report .....	71
SuiteBilling Features Provided by NetSuite SuiteApps .....	73
Subscription Billing Enhanced UI .....	73
Installing the Subscription Billing Enhanced UI SuiteApp .....	74
Creating Items for Subscription Plans with Subscription Billing Enhanced UI .....	75
Creating Subscription Plans with Subscription Billing Enhanced UI .....	76
Managing Price Books and Price Plans with Subscription Billing Enhanced UI .....	77
Managing Subscriptions with Subscription Billing Enhanced UI .....	83
SuiteBilling Enhancements .....	96
Installing the SuiteBilling Enhancements SuiteApp .....	97
Optimizing the Performance of the SuiteBilling Enhancement Script .....	98
Creating Usage Records Using the RESTlet .....	99
Subscription Billing Bulk Operations .....	105
Bulk Customer Payments .....	113

# SuiteBilling Overview

SuiteBilling is a collection of features you can use to create subscriptions for your customers. You can create subscriptions to sell services or non-inventory items over a period of time. SuiteBilling is not for the sale of physical inventory items.

You use SuiteBilling to:

- Create subscription plans, price books, subscriptions, and price plans
- Set up usage and rating, including tier minimums and maximums, included usage, and included an usage multiplier
- Renew an existing subscription
- Modify an existing or renewal subscription by using a change order
- Access billing accounts, charge records, and billing operations
- Integrate with [Revenue Recognition for SuiteBilling](#)

## SuiteBilling Terminology

The following terms are used when referring to SuiteBilling:

- **Billing Account:** Shows all billing-related information for a customer or subcustomer, including the billing schedule, bill-to address, ship-to address, and currency.
- **Billing Operation:** Automates the process of rating and invoicing charges.
- **Change Order:** Changes the status of a subscription or subscription line items. For example, a change order might change a subscription from **Pending Activation** to **Active** status.
- **Charge-Based Billing:** Create charges to bill customers by using the Charge-Based Billing feature. Examples include project milestones, travel expenses, and time entered.
- **Price Plan:** Sets the price for items. You enter amounts in price plans. You also select volume or tiered pricing. Price plans are defined in price books.
- **Price Book:** Defines the pricing for a collection of items or services that are sold as part of a subscription plan. A subscription plan can have multiple price books. Price plans are defined in a price book.
- **Ratable Event:** Certain tasks you perform on a subscription line item that affect NetSuite charge calculations. Examples of actions that cause ratable events include:
  - Activating, suspending, terminating, renewing and reactivating a line item
  - Modifying quantities, pricing, and rates on a line item
  - Saving a change order
- **Rating:** The process of creating charges for subscription line items. NetSuite calculates charges for a subscription using the information on its line items, such as the quantities, and pricing shown in the price plan and price book, the usage and effective date of the subscription, and the status of the subscription and its line items. You use a change order to set and change the status of subscription line items. For details, see [Managing Rating Runs](#).
- **Subscription:** Includes the items being sold and the price and quantity for each item. A subscription is specific to one customer.
- **Subscription Plan:** Includes all of the items that can be sold as part of a subscription. The subscription plan includes price book information and renewal information. A subscription plan is a template or possible bundle a company offers to its customers.

- **Usage:** Defines the charge for a subscription line item that can be consumed, such as money, time, software licenses, or internet data. For example, if you sell mobile phone service plans, your subscription may have a line item for a monthly fee. The monthly fee includes a specific amount of minutes or data in your customer's plan. When this included amount is exceeded, additional charges may apply. In NetSuite, you account for the usage amount included in a subscription when creating the subscription plan.

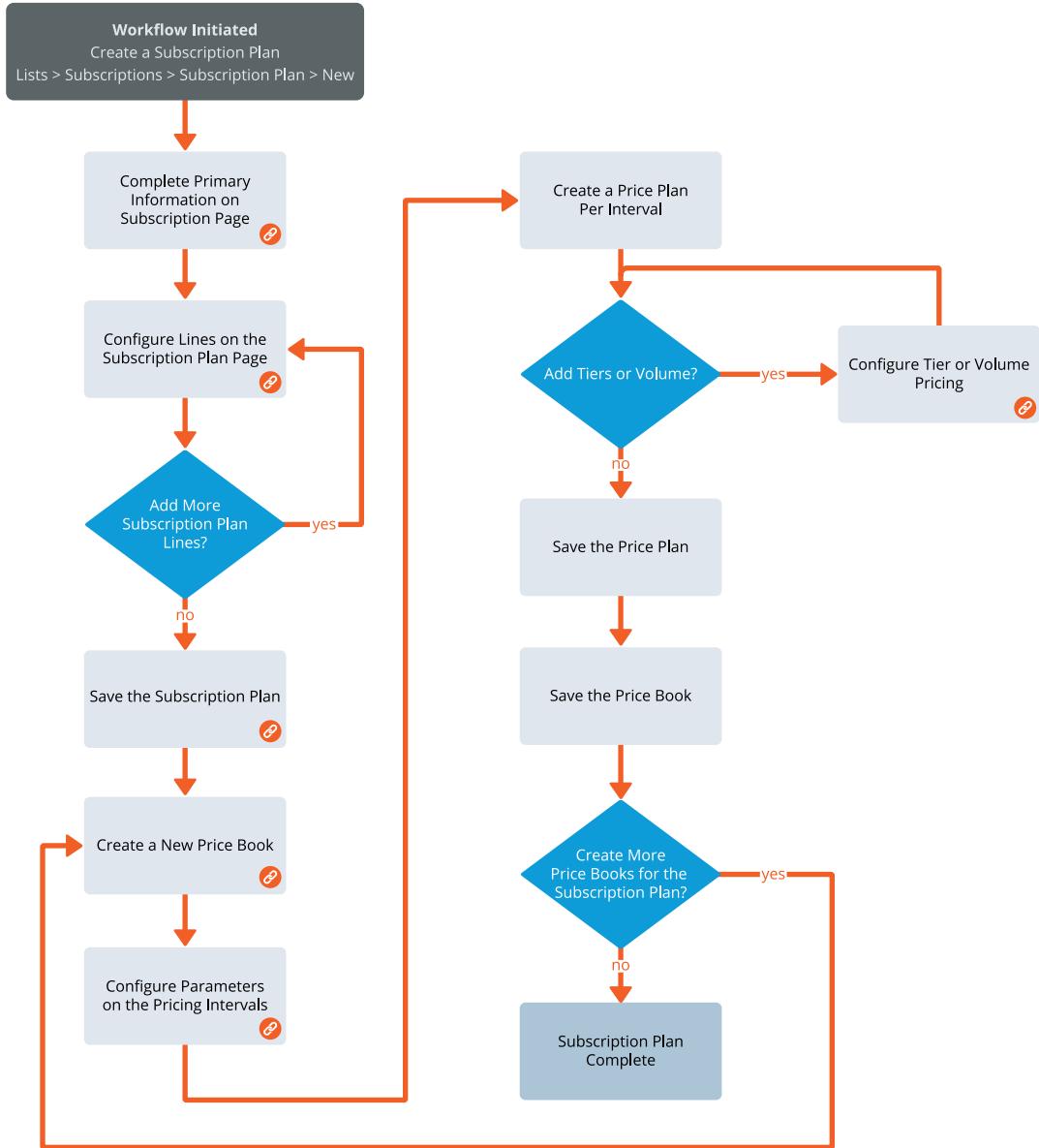
## SuiteBilling Process Diagrams

This section includes high-level overview diagrams of some of the most common SuiteBilling tasks as follows.

- [Subscription Plan Creation](#)
- [New Stand-Alone Subscription Creation](#)
- [Subscription Creation from a Sales Order](#)
- [Renew and Extend a Subscription from a New Subscription Record](#)
- [Renew a Subscription with a New Subscription Record](#)

### Subscription Plan Creation

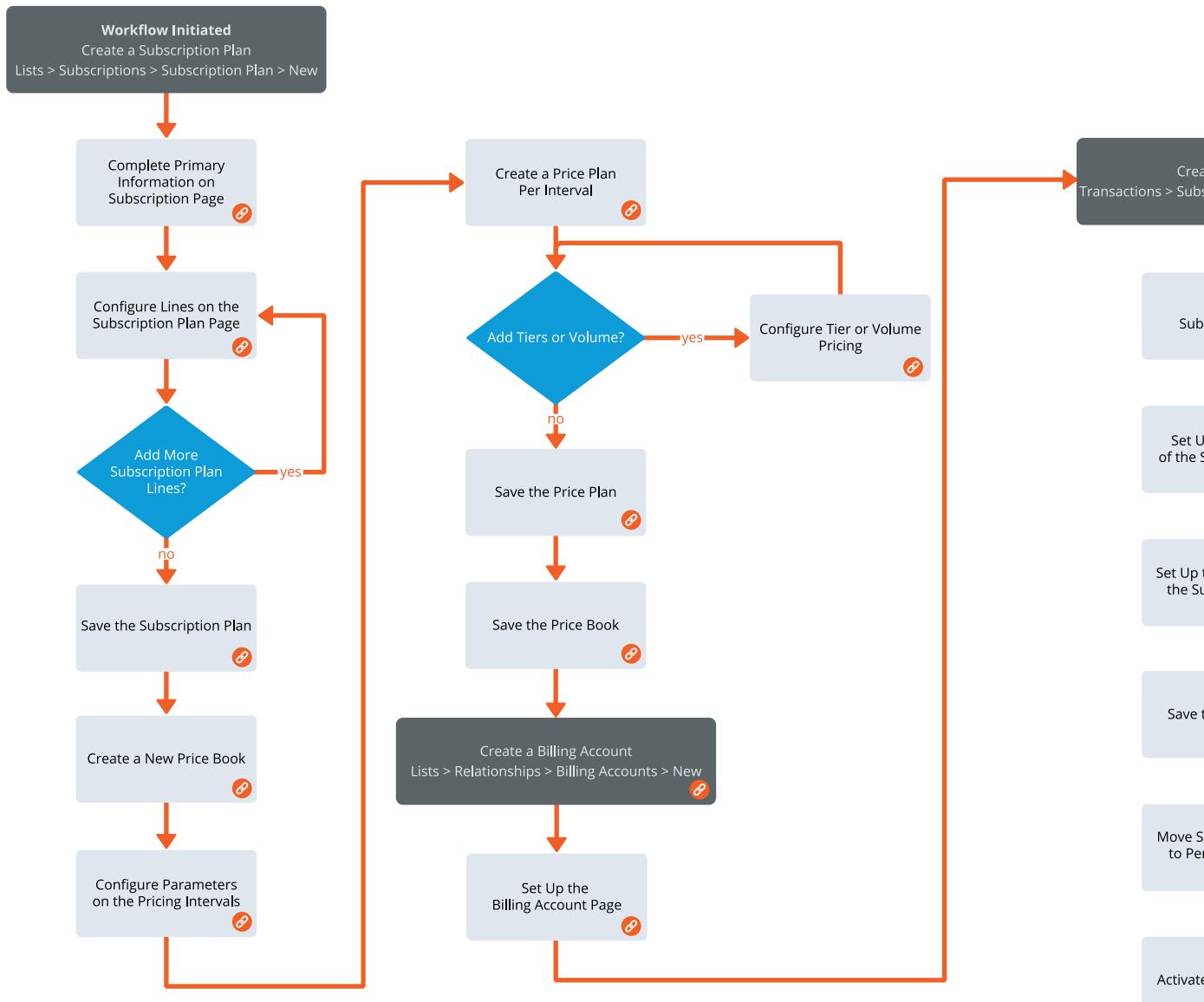
The following diagram shows how to create a new subscription plan. Click a link icon to open the instructions for a process in the diagram.



## New Stand-Alone Subscription Creation

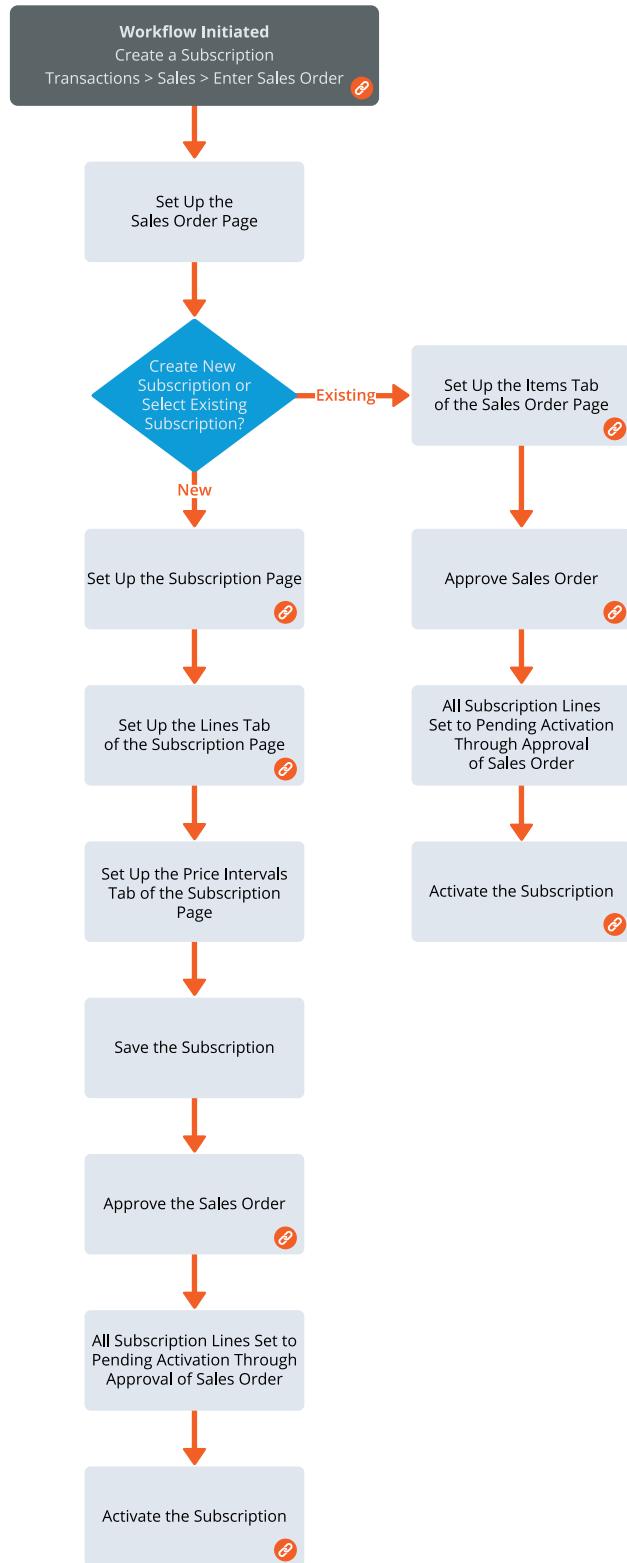
As shown in the following diagram, before you can create a subscription, you must create and set up its components. Subscription components include items, a price plan, a price book, a subscription plan, and a billing account. The following diagram shows how to create a new subscription. Click a link icon to open the instructions for a process in the diagram.

You can create a new, stand-alone subscription without using an existing transaction or subscription. For the instructions about creating a subscription without using an existing transaction or subscription, see [Creating a New Stand-Alone Subscription](#).



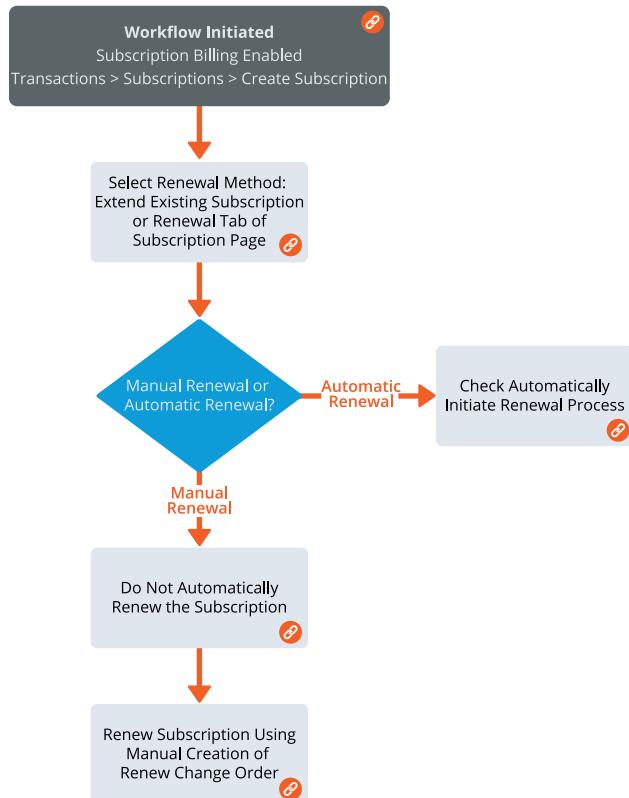
## Subscription Creation from a Sales Order

The following diagram shows how to create a subscription when using the Sales role. Use this workflow to create a new subscription from a new subscription record, a new subscription plan, and a new price books from a transaction. Click a link icon to open the instructions for a process in the diagram.



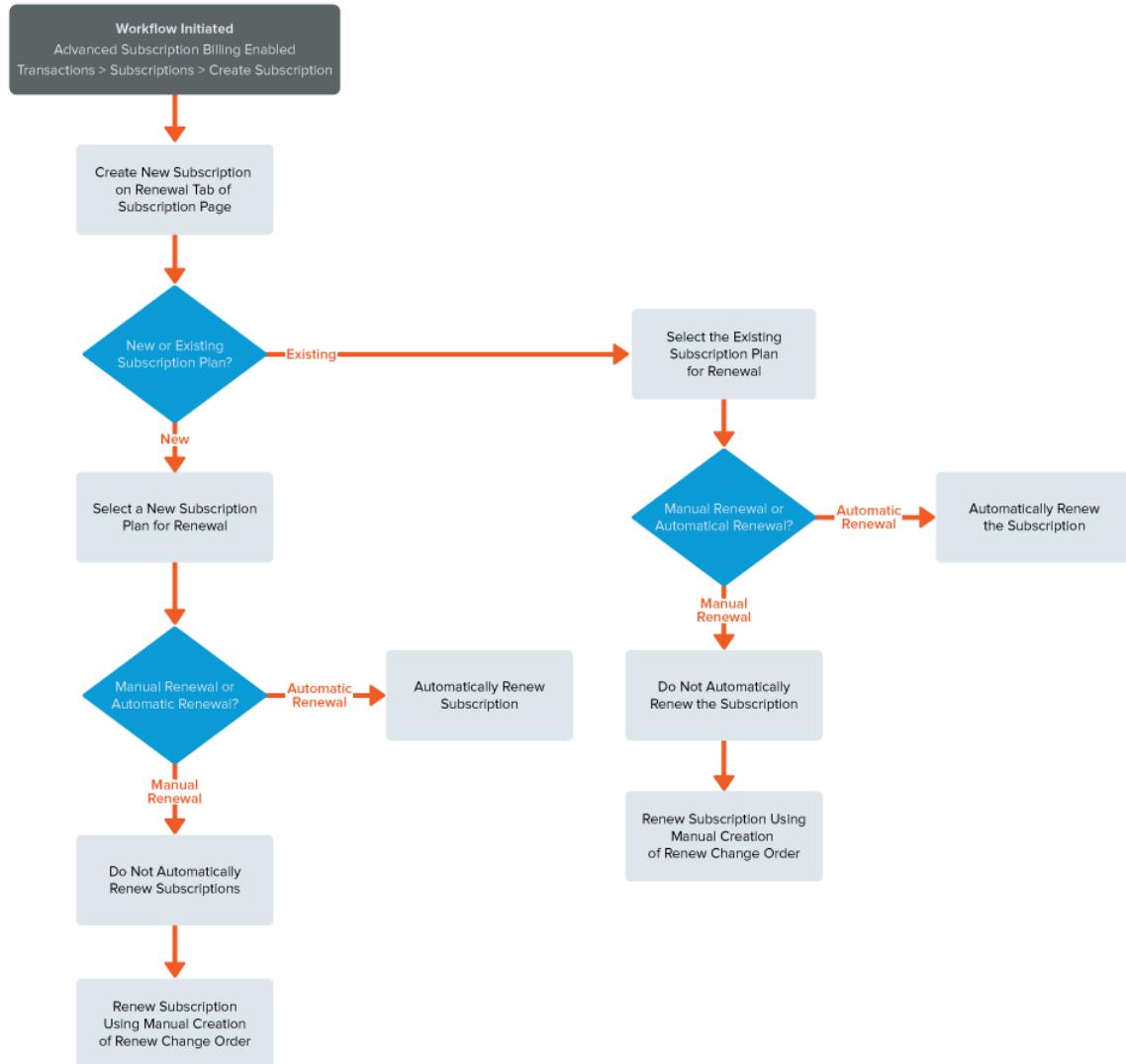
## Renew and Extend a Subscription from a New Subscription Record

The following diagram shows how to renew and extend a subscription by extending the date of an existing subscription. Click a link icon to open the instructions for a process in the diagram.



## Renew a Subscription with a New Subscription Record

The following diagram shows how to renew a subscription by creating a new subscription record, with either a new or existing subscription plan. Use this workflow to renew a subscription with a new subscription record. For the instructions for this process, see [Renewing a Subscription](#).



## SuiteBilling Roles and Permissions

The following table lists the SuiteBilling permissions and permission levels for each standard role. The Center Type column shows the center generally associated with the role. Navigation from Center lists the menu navigation for each role to the Subscriptions menu in that center. When you use the classic interface, you access subscription-related records from the Transactions menu, Subscriptions group.

Role	Center Type	Navigation from Center	Subscription Plan	Subscriptions	Price Book	Price Plan	Subscription Change Order	Usage
A/P Clerk	Accounting Center	Financial > Subscriptions	Full	None	Full	Full	None	Full
A/R Clerk	Accounting Center	Billing > Subscriptions	Full	Edit	Full	Full	Edit	Full
Accountant	Accounting Center	Billing > Subscriptions	Full	Edit	Full	Full	Edit	Full
Accountant (Reviewer)	Accounting Center	Billing > Subscriptions	View	View	View	View	View	View

Role	Center Type	Navigation from Center	Subscription Plan	Subscriptions	Price Book	Price Plan	Subscription Change Order	Usage
Advanced Partner	Advanced Partner Center	Client > Other Transactions	Full	Full	Full	Full	Full	Full
Bookkeeper	Accounting Center	Billing > Subscriptions	Full	Edit	Full	Full	Edit	Full
CEO	Executive Center	Sales > Marketing > Lists	Full	Full	Full	Full	Full	Full
CEO (Hands Off)	Executive Center	Sales > Marketing > Lists	View	View	View	View	View	View
CFO	Accounting Center	Billing > Subscriptions	Full	Full	Full	Full	Full	Full
Sales Administrator	Sales Center	Customers > Subscriptions	View	Full	Full	Full	Full	View
Sales Manager	Sales Center	Customers > Subscriptions	View	Full	Full	Full	Full	View
Sales Person	Sales Center	Customers > Subscriptions	View	Full	Full	Full	Full	View
Sales Vice President	Sales Center	Customers > Subscriptions	View	View	View	View	View	View
Support Administrator	Support Center	Cases > Other Lists	View	Full	View	View	Full	View
Support Manager	Support Center	Cases > Other Lists	View	Edit	View	View	Edit	View
Support Person	Support Center	Cases > Other Lists	View	Edit	View	View	Edit	View
System Administrator	System Administration Center	Lists > Relationships	Full	Full	Full	Full	Full	Full
Warehouse Manager	Shipping Center	Sales/Marketing > Lists	View	None	View	View	None	None
Consultant	Project Center	use global search	None	View	View	View	View	None
Marketing Administrator	Marketing Center	Customers > Subscriptions	View	Full	View	View	Full	None
Marketing Assistant	Marketing Center	Customers > Subscriptions	View	Full	View	View	Full	None
Marketing Manager	Marketing Center	Customers > Subscriptions	View	Full	View	View	Full	None
PM Manager	Support Center	Cases > Other Lists	None	Full	View	View	Full	None
Partner Center	Partner Center	Client > Other Transactions	None	Edit	View	View	Edit	None
Product Manager	Support Center	Cases > Other Lists	None	Full	View	View	Full	None
Resource Manager	Support Center	Cases > Other Lists	View	Full	View	View	Full	View
Store Manager	E-Commerce Management Center	Sales > Other Transactions	View	Edit	View	View	Edit	View
Customer Center	Customer Center	Customer Center Home Page	None	View	None	View	View	None



**Note:** The Navigation From Center column shows one navigation path, but more navigation options may be available. For example, the A/P clerk role can access subscriptions from both Financial > Subscriptions and from Customers > Subscriptions.

The standard roles available in your account may differ, depending upon the modules you purchase and the features you enable. You can see the roles available in your account at Setup > Users/Roles > Manage Roles. To review a role's details, click its link on the Manage Roles page.

For more information on roles and permissions, see the [Standard Roles Permissions Table](#).

## Default Permissions for Subscription Records

The default permission level is View. There are optional permission levels for Create and Edit. Roles with Full access permission can do the following actions:

- View
- Edit
- Create
- Delete

All roles can now view or edit the following records:

- Price book
- Price plan
- Subscription change order

New permissions in NetSuite do not change permissions to customized roles with subscriptions and subscription plan permissions.

The System Administrator role can also give users full access to the subscription record. Only the System Administrator role can grant access to and set up custom records and templates for SuiteBilling subscription processes. For instructions on how to grant permissions to subscription processes, see the help topic [Setting Permissions](#).

## SuiteBilling Change Orders

To edit an active subscription or its components, use a change order. There are specific change orders for each subscription record type.

Change orders change a subscription's or line item's status. For example, the activation change order changes the subscription from the **Pending Activation** status to the **Active** status. You also can use a change order to suspend, renew, or terminate a subscription, or to change prices, quantity, or discount.

The following rules apply to change orders:

- Change orders take effect on the date set in the Effective Date field.
- The change occurs at the beginning of the day. The one exception is the terminate change order, which takes effect at the end of the day.
- You can create change orders in any order, as long as it does not invalidate a change order that has a later effective date. For example, you cannot create a Reactivation change order for a subscription or line item that is already in the **Active** state. You cannot create a Modify Pricing change order on a subscription line item in the **Suspend** state. Likewise, you cannot terminate a subscription or line item that has a Suspend or Modify change order with a later effective date.
- You can have only one change order of any given type on the same date for the same subscription line item. For example, you cannot have more than one activation change order for the same subscription line item and date.

The following table includes change order types and their associated descriptions.

Change Order	Description
Activation	An activation change order begins a subscription. When you create a subscription, the initial status is <b>Draft</b> or <b>Not Included</b> . The <b>Not Included</b> status occurs when you have optional items in the subscription plan that are not included in the subscription. After you set any number of line

Change Order	Description
	<p>items to <b>Pending Activation</b>, submitting the activation change order activates the subscription or subscription line items. You can set the activation date to a past or future date.</p> <p>When you activate dependent line items, they must be activated at the same time. For example, a cell phone subscription contains an item for data usage. The amount of data included in the subscription is multiplied by the number of phones in the subscription. The included quantity multiplier is the item for the number of phones. In this case, both line items must be activated at the same time.</p> <p>NetSuite generates charges based on the activation date. You can delete activation change orders. If you delete an activation change order, all charges associated with the change order are deleted, and the subscription reverts to the <b>Pending Activation</b> status. The exception to this rule is that when there are other change orders associated with the subscription, you cannot delete the activation change order. For instructions on how to activate a subscription, see the help topic <a href="#">Activating a Subscription</a>.</p>
Modify Pricing	<p>A modify pricing change order changes the pricing tier or rate, the quantity of a subscription item, or applies a new discount to active line items on a subscription.</p> <p>The effective date of a modify pricing change order must be after its activation date. When you create and save a modify pricing change order, the charges automatically update to reflect the change order. You can also delete modify pricing change orders. Deleting the change order also deletes the changes to the charges that were applied as part of the change order. For instructions on how to create a modify pricing change order, see <a href="#">Modifying Pricing</a>. If you want to change to off-cycle pricing, which prorates pricing charges mid-cycle, see <a href="#">Off-Cycle Invoicing with Modify Pricing Change Orders</a>.</p>
Suspend	<p>A suspend change order temporarily suspends a subscription or subscription line item until it is reactivated. You can apply a suspend change order to any number of subscription line items. If you suspend a usage line item, you also must suspend the associated usage multiplier line item. You cannot suspend or terminate any line items or subscriptions with a status of <b>Suspend</b>. Subscription lines in the suspended state are not billed until reactivated. To make any changes to a suspended subscription or line item, you must first reactivate it. When a line item or subscription is in the <b>Suspend</b> status, you can terminate it using a terminate change order. For instructions, see <a href="#">Suspending a Subscription Line Item</a>.</p>
Reactivate	<p>Create a reactivate change order to reactivate a suspended subscription or subscription line item. The subscription or line item is reactivated on the date set as the effective date on the change order and changes the status to <b>Active</b>. For instructions, see <a href="#">Reactivating a Subscription Line Item</a>.</p>
Renew	<p>A renew change order renews a subscription when the subscription term ends. You cannot delete a renew change order, but you can make changes before the renewal start date. The renew change order lets you create a new subscription or extend the existing subscription. For more information on the different types of subscription renewals, see <a href="#">Renewing a Subscription</a>.</p>
Terminate	<p>Terminate change orders end a subscription line item at the end of the day on the effective date. To terminate a subscription line item, it must have a status of <b>Active</b>, <b>Pending Activation</b>, or <b>Suspend</b>. After saving a terminate change order, no other change orders are permitted after the effective date of the termination on the subscription line item. If you backdate a termination change order, however, you cannot edit it or delete the change order. You can still make changes prior to the termination effective date. For instructions, see <a href="#">Terminating a Subscription Line Item</a>.</p>

## Maximum Values in SuiteBilling

The maximum number you can enter in the Quantity column of several NetSuite records is 9,999,999,999.99999999. Quantities of one-billion or greater result in an error. This maximum applies to the following records:

- Pricing subtab of a Subscription record

- Items on a subscription Modify Pricing Change Order
- Sales Order
- Invoice
- Credit Memo
- Charge

## Decimal Precision in SuiteBilling

The Price, Quantity, and Discount fields in SuiteBilling display up to eight numerals to the right of the decimal. NetSuite rounds values with more than eight decimal places in these fields to the eighth decimal place. These fields appear on:

- Modify pricing change orders
- Renewal change orders
- Subscription change orders (activate, suspend, reactivate, terminate)
- **Price Book** subtab on subscription plans
- Price books
- Price plans
- Subscriptions
- Subscription Pricing subtab

Rounding to eight decimal places is mainly useful for both usage and high-volume products. NetSuite carries and uses eight decimal places for all subscription rating calculations until the final charge amount is calculated.

The charge amount and precision are based on your account currency, and the amount on the invoice appears in the account's currency. Charge-based billing may display a blended rate. To add or edit your account currencies, see [Currencies](#).

## Revenue Recognition for SuiteBilling

SuiteBilling integrates with Advanced Revenue Management (Essentials) and Advanced Revenue Management (Revenue Allocation) when you enable all three features. After setup, each subscription line generates a revenue element. A single revenue arrangement that corresponds with the subscription automatically includes the revenue elements from the subscription lines.

If you check the accounting preference **Create Revenue Elements for Subscription Revisions** box, subscription revisions also trigger modification elements and revenue arrangements. For more information, see [Setting the Optional Accounting Preference for Advanced Revenue Management](#).



**Note:** If you check the **Create Revenue Elements for Subscription Revisions** box, be sure to merge modification elements with the subscription revenue arrangements to get the correct accounting. For information, see the help topic [Combination and Modification of Performance Obligations](#).

All of the processes of Advanced Revenue Management (Essentials) and Advanced Revenue Management (Revenue Allocation) are available for SuiteBilling. For information about Advanced Revenue Management, see the help topic [Advanced Revenue Management \(Essentials\) and \(Revenue Allocation\)](#).

The following topics have detailed information about configuring advanced revenue recognition for SuiteBilling.

- Revenue Recognition Rules for SuiteBilling
- Calculations for Revenue Plans Created on Subscription Events
- Revenue Allocation for One-Time and Recurring Subscription Lines

After you configure Advanced Revenue Management for SuiteBilling, be sure to complete the additional month-end steps to recognize revenue in your month-end procedures. The basic month-end revenue recognition processes are as follows:

1. Create revenue recognition journal entries. You can schedule the revenue recognition journal entry creation process. For details, see the help topic [Revenue Recognition Journal Entries](#).
2. Reclassify deferred revenue. You can schedule the reclassification process. For details, see the help topic [Reclassification of Deferred Revenue](#).
3. Recalculate revenue forecast plans. See the help topic [Recalculating Revenue Forecast Plans](#).
4. Run and save the Deferred Revenue Waterfall Report. See the help topics [Run and Save the Deferred Revenue Waterfall Report](#) and the linked topics for the individual reports.

## Revenue Recognition Rules for SuiteBilling

**Note:** The information in this topic applies regardless of whether you check the **Create Revenue Elements for Subscription Revisions** accounting preference except where the accounting preference is clearly identified.

NetSuite provides the following default revenue recognition rules for SuiteBilling. You select revenue recognition rules on the item record. For more information, see [Configuring Subscription Items for Revenue Recognition](#) and [Creating Items for Subscription Plans](#).

The following table shows the recommended revenue recognition rules that correspond to the rate plans of the subscription line types:

Subscription Line Type	Revenue Recognition Rule
Recurring – Adjustable	Depends on the state of the accounting preference <b>Create Revenue Elements for Subscription Revisions</b> : <ul style="list-style-type: none"> <li>■ When clear, use Default Adjustable Recurring Fee</li> <li>■ When checked, use Default Fixed Recurring Fee</li> </ul>
Recurring – Fixed	Default Fixed Recurring Fee
One-Time	Default Fixed Recurring Fee
Usage	Default Usage

You can change the names of these default revenue recognition rules but not their settings. The default values for these fields are listed in the following table. For more information about the revenue recognition rules, see the help topic [Revenue Recognition Rules](#).

Revenue Recognition Rule	Recognition Method	Amount Source	Rev Rec Start Date Source	Rev Rec End Date Source
Default Adjustable Recurring Fee	Straight-line, prorate first & last period (period-rate)	Event-Percent based on amount	Subscription Event Start Date	Subscription Event End Date
Default Fixed Recurring Fee	Straight-line, prorate first & last period (period-rate)	Event-Percent based on amount	Revenue Element Start Date *	Revenue Element End Date *

Revenue Recognition Rule	Recognition Method	Amount Source	Rev Rec Start Date Source	Rev Rec End Date Source
Default Usage	Straight-line, prorate first & last period (period-rate)	Event-Percent based on amount	Event Date	Event Date

- \* To generate revenue plans using these values, you usually enter the **Start Date** and **End Date** in the revenue element. However, when the revenue element source is a subscription, these dates are automatically derived from the subscription lines.

None of the default revenue recognition rules for SuiteBilling use Event-Percent based on quantity as the amount source. This amount source is not suitable for SuiteBilling.

When the credit memo does not contain a linked subscription charge, the revenue recognition rule for the item record is ignored. Instead, Advanced Revenue Management (Essentials) uses the rule you select with the **Default Standard Revenue Recognition Rule** accounting preference to generate the revenue plan for the credit memo line. For information about accounting preferences for revenue recognition, see the help topic [Setting Advanced Revenue Management \(Essentials\) Preferences](#).

Subscription lines with usage do not create revenue plans until the bill run executes. Forecasting and reforecasting are not supported for subscription lines with usage. For information about reforecasting, see the help topic [Recalculating Revenue Forecast Plans](#).

## Calculations for Revenue Plans Created on Subscription Events



**Note:** This topic describes what happens when you clear the **Create Revenue Elements for Subscription Revisions** accounting preference. When you check the preference, the recommended value of the **Create Revenue Plans On** field, for all subscription items except usage items, is Revenue Arrangement Creation. For instructions on setting the preference and details about the checked preference, see [Setting the Optional Accounting Preference for Advanced Revenue Management](#).

The recommended value for the **Create Revenue Plans On** field on item records for Recurring – Adjustable and Usage subscription line types is Subscription Events. When a subscription event initiates creating a revenue recognition plan, the forecast revenue plan uses the full revenue amount. However, actual revenue plans are aggregated from a series of virtual plans that use the subscription event amount. Recognition methods for the virtual actual plans treat the charge period as the period.

You can use the virtual plans to set your own dates when the subscription quantity or pricing changes. The revenue recognition plan can pick up any changes in virtual plans from the period in which they occur, rather than recalculating the entire subscription term. Individual subscription charges, start dates, and end dates for virtual plans align with the lines on the Charges subtab of the Billing Account page.

Due to differences in dates and amounts, the forecast and actual revenue plans may differ from each other at the line level. The following examples show the calculations for actual and forecast revenue plans created on subscription events for two revenue recognition methods.

- [Straight-Line, by Even Periods Method](#)
- [Straight-Line, Prorate First & Last Period Method](#)

For information and examples of all recognition methods, see the help topic [Straight-Line Revenue Recognition Examples in Advanced Revenue Management \(Essentials\)](#). The examples share the following values:

- **Subscription term** – 6 months, April 9 – October 8
- **Monthly charge** – \$100
- **Total revenue amount** – \$600
- **Billing date** – the ninth day of each month, April – September

## Straight-Line, by Even Periods Method

This method divides the revenue amount evenly across all periods. Currency amounts are not prorated based on the number of days in any period. The virtual actual plans treat the charge period as the period.

The forecast plan has seven periods and a revenue amount of \$600. The last period includes the amount needed to correct rounding the previous periods.

The virtual plans have a revenue amount of \$100. The monthly charge amount is divided equally between the two periods shown as A and B in the following table. The actual revenue plan line is the sum of the calculations for:

- The days after and including the billing date (B)
- The days before the billing date (A)

Period	Billing Date	Charge	Forecast Plan	Virtual Plan A	Virtual Plan B	Actual Plan A + B =
Apr	Apr 9	100.00	85.71		50.00 = Charge a ÷ 2	50.00
May	May 9	100.00	85.71	50.00 = Charge a ÷ 2	50.00 = Charge b ÷ 2	100.00
Jun	Jun 9	100.00	85.71	50.00 = Charge b ÷ 2	50.00 = Charge c ÷ 2	100.00
Jul	Jul 9	100.00	85.71	50.00 = Charge c ÷ 2	50.00 = Charge d ÷ 2	100.00
Aug	Aug 9	100.00	85.71	50.00 = Charge d ÷ 2	50.00 = Charge e ÷ 2	100.00
Sep	Sep 9	100.00	85.71	50.00 = Charge e ÷ 2	50.00 = Charge f ÷ 2	100.00
Oct			85.74	50.00 = Charge f ÷ 2		50.00
Total		600.00	600.00			600.00

## Straight-Line, Prorate First & Last Period Method

This method recognizes revenue in equal amounts for all periods except the first and final periods, regardless of the number of days in those periods. Currency amounts are prorated for the first period and the final period based on the number of days in those periods, divided by the total number of days from the revenue recognition start and end dates, inclusive. The virtual actual plans treat the charge period as the period.

The forecast plan has 183 days and a revenue amount of \$600. The last full period includes the amount needed to correct rounding of the previous periods.

For the actual plan, each service period extends over parts of two months, so each is prorated by the number of days in the month. The actual revenue plan line is the sum of the calculations for the days:

- After and including the billing date (B)
- Before the billing date (A)

Period	Billing Date	Charge	Forecast Plan	Virtual Plan A	Virtual Plan B	Actual Plan A + B =
Apr	Apr 9	100.00	72.13 = $600 \div 183 \times 22$		73.33 = charge a ÷ $30 \times 22$	73.33
May	May 9	100.00	100.33 = $(600 - 72.13 + 26.23) \div 5$	26.67 = charge a - 73.33	74.19 = charge b ÷ $31 \times 23$	100.86
Jun	Jun 9	100.00	100.33 = $(600 - 72.13 + 26.23) \div 5$	25.81 = charge b - 74.19	73.33 = charge c ÷ $30 \times 22$	99.14
Jul	Jul 9	100.00	100.33 = $(600 - 72.13 + 26.23) \div 5$	26.67 = charge c - 73.33	74.19 = charge d ÷ $31 \times 23$	100.86
Aug	Aug 9	100.00	100.33 = $(600 - 72.13 + 26.23) \div 5$	25.81 = charge d - 74.19	74.19 = charge e ÷ $31 \times 23$	100.00
Sep	Sep 9	100.00	100.32 = $(600 - 72.13 + 26.23) \div 5$	25.81 = charge e - 74.19	73.33 = charge f ÷ $30 \times 22$	99.14
Oct			26.23 = $600 \div 183 \times 8$	26.67 = charge f - 73.33		26.67
Total		600.00	600.00			600.00

## Revenue Allocation for One-Time and Recurring Subscription Lines

**Note:** The information in this topic applies regardless of whether you check the **Create Revenue Elements for Subscription Revisions** accounting preference except where the accounting preference is clearly identified.

The Advanced Revenue Management (Revenue Allocation) feature must be enabled as a prerequisite for revenue allocation.

To allocate revenue for one-time and recurring subscription lines, revenue elements include a field called **Alternate Quantity**. The alternate quantity is the result of the quantity of the subscription line item

multiplied by the **recurrence frequency**, which is the number of times the customer is charged over the subscription term.

For example, consider two subscription lines. The line in example A has a term of 6 years with an annual recurrence frequency and a quantity of 2. Its alternate quantity is 12. The line in example B has a term of 3 years with a monthly recurrence frequency and a quantity of 5. Its alternate quantity is 180.

	<b>Example A</b>	<b>Example B</b>
Term	6 years	3 years
Recurrence Frequency	Annually	Monthly
Term x Recurrence Frequency	6 year term × 1 charge per year = 6	3 year term × 12 charges per year = 36
Quantity	2	5
Alternate Quantity	$2 \times 6 = 12$	$5 \times 36 = 180$

The fair value price record must include the appropriate values for Units Type and Units to support the allocation. When you include a value in Alternate Quantity and the other alternate fields, the {quantity} field in fair value formulas uses the alternate quantity. Units Type and Units are displayed on the fair value price record only when you enable the Multiple Units of Measure feature. For information, see the help topic [Multiple Units of Measure](#).

## Alternate Quantity Computation for Activation Revenue Arrangement When the Billing Schedule Starts Mid-Month

The following example shows how the Alternate Quantity is computed for the activation revenue arrangement when the billing schedule starts mid-month and proration is selected for subscription start date and subscription end date:

- Start Date 8/1/2019
- End Date 11/30/2019
- Recurrence Date 8/16/2019

With the recurrence start date preference on, the billing account invoice periods affect the subscription recurrence pattern.

The billing account affects the alternate quantity because the charge and rating period are offset from the start date, causing the recurrence start date to be 8/16/2019 for the subscription. This makes the first and last charge periods prorated, as shown in the following table:

<b>Rating Periods</b>	<b>Start Date</b>	<b>End Date</b>	<b>Days</b>	<b>Daily Quantity</b>
7/16/2019	8/15/2019	31	10	0.322581
8/16/2019	9/15/2019	31	10	0.322581
9/16/2019	10/15/2019	30	10	0.333333
10/16/2019	11/15/2019	31	10	0.322581
11/16/2019	12/15/2019	30	10	0.333333
Charge Periods				

Rating Periods	Start Date	End Date	Days	Daily Quantity
8/1/2019	8/15/2019	15	4.8387097	
8/16/2019	9/15/2019	31	10	
9/16/2019	10/15/2019	30	10	
10/16/2019	11/15/2019	31	10	
11/16/2019	11/30/2019	15	5	
			39.8387097	

# SuiteBilling Setup

This chapter describes the actions required to enable and set up SuiteBilling. SuiteBilling requires you to set preferences before you can enable its associated features. This chapter includes tasks that you usually need to perform only one time for your initial setup.

## Setting the SuiteBilling Preferences

**Note:** Before you can enable the SuiteBilling feature, you must contact your NetSuite sales or account representative to provision this feature for your NetSuite account.

You cannot enable the SuiteBilling features until these actions are completed:

- [Consolidating Projects on Sales Orders](#)
- [Disabling Employee Commissions](#)

You can also set [Setting Optional Preferences](#).

For high-level overview diagram of the workflows that include this procedure, see [Subscription Plan Creation](#), [New Stand-Alone Subscription Creation](#), and [Subscription Creation from a Sales Order](#).

### Consolidating Projects on Sales Orders

If you have the Projects feature enabled, before you can enable SuiteBilling, you need to set the Consolidate Projects on Sales Transactions preference.

#### To set the accounting preference to consolidate projects on sales orders:

1. Go to Setup > Accounting > Accounting Preferences.
2. Click the **Items/Transactions** subtab.
3. Check the **Consolidate Projects on Sales Transactions** box.
4. Click **Save**.

### Disabling Employee Commissions

Before you can enable SuiteBilling, you need to disable the Employee Commissions feature.

**Note:** When your account includes commissions data, that data is inaccessible, although still in the account, when Employee Commissions is disabled. If you want to refer to commissions data while using SuiteBilling, you can export the data from Reports > Commissions > Commission Overview Report for Employee commissions and Reports > Commissions > Partner Commission Overview Report for Partner commissions. To correctly set the time range of the report, set the **From** field to the employee start date and the **To** field to the current date. For additional instructions, see the help topic [Exporting a Report](#).

#### To disable the Employee Commissions feature:

1. Go to Setup > Company > Enable Features.
2. Click the **Employees** subtab.
3. In the Commissions section, clear the **Employee Commissions** box.
4. Click **Save**.

# Enabling SuiteBilling Features

SuiteBilling has a collection of features to enable.

Before you enable SuiteBilling features, be sure that:

- You are logged in to NetSuite using an Administrator role.
- You have set the SuiteBilling preferences as instructed in [Setting the SuiteBilling Preferences](#).

For high-level overview diagrams of the workflows that include this procedure, see [Subscription Plan Creation](#), [New Stand-Alone Subscription Creation](#), and [Subscription Creation from a Sales Order](#).

## To enable SuiteBilling features:

1. Go to Setup > Company > Enable Features.
2. Click the **Transactions** subtab.
3. In the Billing section, check the following boxes:
  - **Bill Costs to Customers**
  - **Advanced Billing**
  - **Charge-Based Billing**
  - **Billing Accounts**
  - **Billing Operations**
  - **Subscription Billing**
  - **Advanced Subscription Billing**

Optionally, you can check the following boxes:

- Add-on Items
- Time-Based Pricing, which you use to create multiple time-based pricing intervals. For instructions on how to use time-based pricing, see [Time-Based Pricing](#).

When Time-Based Pricing is enabled, you can use the Subscription Billing Enhanced UI SuiteApp. This SuiteApp has the same functionality as the SuiteBilling Time-Based Pricing feature, but with an improved user interface. For more information about the Subscription Billing Enhanced UI SuiteApp, see [Subscription Billing Enhanced UI](#).

4. On the Company tab in the Classifications section, you can optionally check any of the following boxes:
  - **Departments**
  - **Locations**
  - **Classes**
5. Click **Save**.

# Optional Preferences for SuiteBilling

SuiteBilling has several optional preferences.

## Setting Optional Preferences

You can streamline your subscription creation and management process with optional preferences.

## To set optional preferences for subscription creation and management:

1. Go to Setup > Accounting > Accounting Preferences.
2. On the **Classifications** subtab, check the box for each preference that you want to set:

- **Make Classes Mandatory**
- **Make Departments Mandatory**
- **Make Locations Mandatory**
- **Allow Per-Line Classes**
- **Allow Per-Line Departments**
- **Allow Per-Line Locations**

If you check the **Make Classes Mandatory**, **Make Departments Mandatory**, or **Make Locations Mandatory** preferences, these fields are required while you are creating the subscription or subscription line. If any of the Allow Per-Line preferences are checked, the line-level value is used in revenue reporting. If Allow Per-Line preferences are cleared, the class, department, and location values on the subscription line record come from the billing account. For more information about the **Class**, **Department**, and **Location**, see [Class, Department, and Location Fields on Subscription Lines](#).

3. Go to Setup > Accounting > Invoicing Preferences.
4. On the **Subscription Management** subtab:



**Note:** The **Subscription Management** subtab does not appear until after you enable SuiteBilling.

- a. Check the box for each preference that you want to set:
  - **When Sales Order Gets Approved, Auto-Change Subscription Status to 'Pending Activation'.** This will move subscription lines in Draft status to Pending Activation status if the subscription is saved on a sales order and the order gets approved.
  - **First Activation Change Order Creation Sets the Subscription Start Date.** With this preference enabled, the start date and activation date need to be the same. Otherwise, the start date changes to the line item activation date.
  - **Request Credit Memo for Off-Cycle Change Orders.** This preference automatically creates credit memos when doing off-cycle invoicing.
  - **Create Delta Charges for Changes to Invoiced Service Periods.** If this preference is not visible in your account, contact your NetSuite account representative or NetSuite Customer Support. There is no additional cost to activate Delta Charges.



**Note:** You cannot turn off Delta Charges after the first Delta charge is created.

To see how to set this preference, view the video:



[Enabling Delta Charges](#)

- b. To align subscription charges with the subscription start date, check the **Align Charge Amounts with Subscription** box.

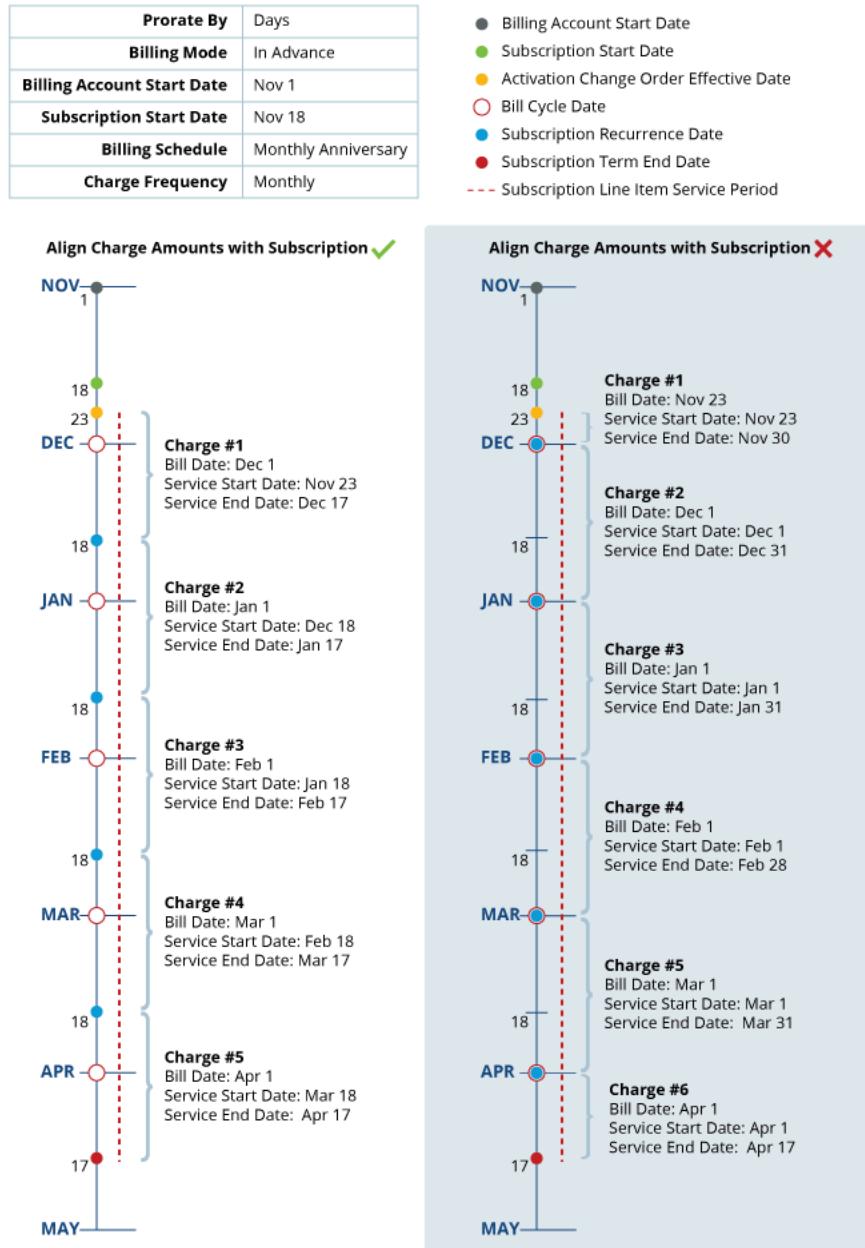
When you activate a subscription, its current preference setting dictates the subscription charge pattern.

When you check the **Align Charge Amounts with Subscription** preference, and then activate subscriptions:

- All lines within a single activated subscription have a charge pattern aligned with the subscription header start date instead of its bill dates.

- Multiple-year subscriptions with multiple charge frequencies, such as monthly, quarterly, and annual, recur based on the subscription start date for better alignment of charge periods.

The subscription charge patterns of the **Align Charge Amounts with Subscription** preference is shown in the following figure.



Existing subscriptions activated before setting this preference may display the original recurrence pattern.

If the **Align Charge Amounts with Subscription** preference is cleared, charges align with the billing schedule of the billing account.. When this preference is set, charges align the recurrence start date with the subscription start date. When the preference is set but you have not selected a billing account for the subscription, the recurrence start date is the

subscription start date. When the subscription has no billing but **Align Charge Amounts with Subscription** is cleared, the start date is not calculated until you save, when you must select a price book.

When you select a billing account for the subscription and click **Save**, the recurrence start date updates to align with the billing account recurrence pattern. This changes the ratable events that are generated in Draft mode, which may affect the Sales Order synchronization or other processes that depend on the ratable event amounts. When you select a billing account, rating runs.

If **Align Charge Amounts with Subscription** is cleared, the total contract value may change when you select a billing account on the subscription.

- c. To automatically extend the Estimated Revenue Recognition End Date for evergreen subscriptions, enter a value between 1 and 120 for the following preference:

#### **Months To Extend Estimated Revenue Recognition End Date**



**Tip:** Set this preference according to your billing schedule.

- If you bill evergreen subscriptions monthly, set this preference to 1 or greater.
- If you bill evergreen subscriptions quarterly, set this preference to 3 or greater.
- If you bill evergreen subscriptions annually, set this preference to 12 or greater.

- d. If you entered a value for the **Months To Extend Estimated Revenue Recognition End Date** preference, you also must enter a value between 1 and 120 for the following preference:

#### **Months Prior To Estimated Revenue Recognition End Date To Initiate Auto-Extend**

5. To ensure that all days are prorated to the same amount regardless of the number of days in the year, check the **Exclude February 29 When Prorating by Days or Months** preference.

To see how to set this preference, view the video:



[Setting the Leap Year Preference](#)

6. To remove a one-day charge from a subscription line item, check the **Default Terminations Effective at Start of Day** preference.
7. Click **Save**.

## Setting the Optional Accounting Preference for Advanced Revenue Management

To create individual revenue elements for each subscription change order, check the **Create Revenue Elements for Subscription Revisions** accounting preference. When you check the preference:

- All subscription revisions generate a separate revenue arrangement and corresponding revenue elements.
- All subscription revisions generate modification elements that account for the impact on revenue.

Check this preference to:

- Generate the modification element according to the ASC-606 accounting policies for subscription modifications when you have allocated revenue
- Prospectively merge the modification elements

You also can still retrospectively merge the modification element. For instructions, see the help topic, [Merging to Combine Revenue Arrangements](#). The Revenue Summary popup window for revenue arrangements shows merged elements. For more information, see the help topic [Revenue Summary Details](#).



**Note:** This accounting preference is not compatible with custom revenue recognition events.

### To set the optional accounting preference for Advanced Revenue Management:

1. Go to Setup > Accounting > Accounting Preferences.
2. Click the **General** subtab.
3. On the **Subscription Management** section, check the **Create Revenue Elements for Subscription Revisions** box.



**Warning:** After you set the **Create Revenue Elements for Subscription Revisions** preference, you cannot change it.

4. Click **Save**.

For more information, see [Revenue Recognition for SuiteBilling](#).

## Enabling the Multi-Subsidiary Customer Feature for SuiteBilling

If you have billing accounts across subsidiaries, you can take advantage of the Multi-Subsidiary Customer functionality. For more information, see the help topic [Assigning Subsidiaries to a Customer](#).

### To enable Multi-Subsidiary Customer for SuiteBilling:

1. Enable the SuiteTax feature. For details, see the help topic [Enabling the SuiteTax Feature](#).



**Note:** SuiteBilling does not require SuiteTax. However, if you want to use the Multi-Subsidiary Customer feature and SuiteBilling together, you need to enable SuiteTax. Nexus switching that is required to support multiple subsidiaries associated with one customer and the switching of Bill To addresses are best supported with SuiteTax.

2. Enable the Multi-Subsidiary Customer feature. For details, see the help topic [Enable the Multi-Subsidiary Customer Feature](#).

If the Multi-Subsidiary Customer feature is enabled, the billing account field is not automatically populated on the Subscription record.

## Creating Items for Subscription Plans

A subscription plan is made up of all of the items that define a subscription. These items include recurring services, usage, and one-time charges. Before you can create a subscription plan, you must create item records for the products and services you sell as part of subscriptions.

To learn how to create subscription items, view the video:



[Creating Subscription Items](#)

For high-level overview diagrams of the workflows that include this procedure, see [Subscription Plan Creation](#), [New Stand-Alone Subscription Creation](#), and [Subscription Creation from a Sales Order](#).

## To create an item for a subscription plan:

1. Go to Lists > Accounting > Items > New.
2. Subscription items must be either a non-inventory item or a service item for sale. Other item types are not available on subscription plans. Do one of the following:
  - To add a non-inventory item, under **Non-inventory Item**, click **For Sale** or **For Resale**.
  - To add a service item, under **Service Item**, click **For Sale** or **For Resale**.
3. In the **Item Name/Number** field, enter a value.
4. You can define the **Class**, **Department**, and **Location** fields on the Subscription Line record. For more information on class, department, and location, see [Class, Department, and Location Fields on Subscription Lines](#).
5. Complete any additional fields.
6. Click the **Accounting** subtab.
7. From the **Tax Schedule** list, select a tax schedule. To add a new tax schedule to the list, click the **Open** arrow.
8. Click the **Preferences** subtab.
9. Clear the **Can Be Fulfilled/Received** box.



**Note:** For non-inventory items, this box is checked by default and you must clear it. For service items, this box is cleared by default.

10. Click **Save**.

For more information about the item record and using items, see the help topic [Using Item Records](#).

To set up revenue recognition for the item, see [Configuring Subscription Items for Revenue Recognition](#). For more information about advanced revenue recognition, see [Revenue Recognition for SuiteBilling](#).

## Class, Department, and Location Fields on Subscription Lines

You can define the **Class**, **Department**, and **Location** fields on the Subscription and Subscription Line records in the Draft or Pending Activation status. NetSuite supplies the values of these fields automatically in the following order:

1. If the Item record has values in any of these fields, that field on the Subscription Line record shows the Item record's values.
2. If the Item record does not have a value for any of these fields, NetSuite checks the subscription plan, and the field on the Subscription Line record shows its subscription plan value, if any.
3. If a field does not have a value in the subscription plan, NetSuite checks the billing account, and the field on the Subscription Line record shows those values, if any.
4. If the Item record, subscription plan, and billing account do not have values in these fields, they are empty on the Subscription Line record.

If any of the **Allow Per-Line Classes**, **Allow Per-Line Departments**, or **Allow Per-Line Locations** preferences are checked, revenue reporting uses the line-level value. If the line-level preferences are cleared, the values for Class, Department, or Location of the subscription line come from the billing account. For reporting processes, the values of the **Class**, **Department**, and **Location** fields from the subscription line are used for charges and revenue elements.

Values flow from the subscription record and subscription line to the charges and revenue processes, then to the invoice processes, and finally to recognizing revenue. Existing subscription lines update to the value set on the item or billing account, depending on the whether the line-level preferences are set. Any existing revenue elements will not change. Charges may change if line-level preferences are cleared.

## Configuring Subscription Items for Revenue Recognition

**Note:** The information in this topic applies regardless of whether you check the **Create Revenue Elements for Subscription Revisions** accounting preference except where the accounting preference is clearly identified.

### To configure subscription items for revenue recognition:

1. To set up subscription items with different subscription line types, create an item record for each subscription type. For instructions, see [Creating Items for Subscription Plans](#).

 **Tip:** When the Advanced Revenue Management (Essentials) feature is enabled, the **Deferred Revenue Account** field on the **Accounting** subtab defaults to the system-generated Deferred Revenue account. If you want to use a different account, be sure to select it.

2. On the **Revenue Recognition/Amortization** subtab, in the Advanced Revenue Recognition group, set the other required fields for revenue recognition as follows:
  - a. Use the same value for the required Rev Rec Forecast Rule as for the Revenue Recognition Rule.
  - b. Accept the defaults for fields not included in the following table.
  - c. The recommended values for the subscription line types are in the following table.

Subscription Line Type	Revenue Recognition Rule	Create Revenue Plans On	Allocation Type
<b>Recurring – Adjustable</b> , when the <b>Create Revenue Elements for Subscription Revisions</b> box is <b>cleared</b>	Default Adjustable Recurring Fee	Subscription Events	Normal
<b>Recurring – Adjustable</b> , when the <b>Create Revenue Elements for Subscription Revisions</b> box is <b>checked</b>	Default Fixed Recurring Fee	Revenue Arrangement Creation	Normal
<b>Recurring – Fixed</b>	Default Fixed Recurring Fee	Revenue Arrangement Creation	Normal
<b>One Time</b>	Default Fixed Recurring Fee	Revenue Arrangement Creation	Normal
<b>Usage</b>	Default Usage	Subscription Events	Exclude*

\* For usage subscriptions, set the **Allocation Type** to Exclude to avoid potential errors when revenue arrangements are merged. Revenue Allocation is supported for recurring and one-time subscriptions. For more information, see [Creating Usage Records](#).

3. On the **Accounting** subtab of the item record, select a **Deferred Revenue Account**.

Create Revenue Plans On is not a required field because you can set its value in the revenue element. Do not use Revenue Arrangement Creation as the value for Create Revenue Plans On when the rule uses subscription events as the start and end date sources.

The Default Adjustable Recurring Fee rule is an example of a rule with these start and end date sources. Actual revenue recognition plans that are created on subscription events do not include start and end dates. For more information about plans created on subscription events, see [Calculations for Revenue Plans Created on Subscription Events](#).

## Creating Subscription Plans

When you create a subscription plan, you specify the items, such as recurring services, usage, and one-time charges, to include in the subscription.

To learn how to set up a subscription plan and price plan in NetSuite, view the video:



[Setting Up a Subscription Plan and Price Plan](#)

For high-level overview diagrams of the workflows that include this procedure, see [Subscription Plan Creation](#), [New Stand-Alone Subscription Creation](#), and [Subscription Creation from a Sales Order](#).

### To create a subscription plan:

1. Go to Lists > Subscriptions > Subscription Plans > New.
2. In the **Subscription Plan Name** field, enter a name.
3. From the **Initial Term** list, do one of the following:
  - Select a term. Options include the following:
    - **Standard Term** – The subscription-level end date defines the end date for all of the items. This results in the alignment of end dates. NetSuite calculates the end date as the subscription start date plus the indicated subscription term. One-time subscription lines are the exception, because they are only active for one day.
    - **Custom Term** – You must set the subscription-level end date at the subscription level. This date defines the end date for all of the items, resulting in the alignment of end dates. One-time subscription lines are the exception, because they are only active for one day. The subscription-level end date for a custom term remains editable until any subscription line becomes active.
    - **Evergreen Term** – Revenue ends after three years unless you set optional invoicing preferences to automatically extend revenue recognition.
  - Create a new term by clicking the plus icon.
4. On the **Lines** subtab, do the following for each item you want to add:
  - a. In the **Item** column, select an item. If the item list does not include an item you need for this subscription plan, see [Creating Items for Subscription Plans](#).
  - b. In the **Required** column:
    - Check the box if you want the subscription to always include this item.
    - Clear the box if you want the customer to be able to include or exclude the item as an option at the time of sale.
  - c. In the **Type** column, select one of the following:
    - **One Time** – Items that incur a single charge, such as a setup or initialization fee.

- **Recurring** – Items that incur charges throughout the subscription, such as recurring service.
  - **Usage** – Items that incur charges based upon how much or how often the customer uses them, such as minutes or data.
- d. In the **Mode** column, select one of the following:
    - **In Advance** – Payment is due at the beginning of the charge period (for example, the first day of the month).
    - **In Arrears** – Payment is due at the end of the charge period (for example, the last day of the month).
  - e. In the **Include in Renewal Subscription** column, click the down arrow to display the available renewal options and select a different option if desired.
  - f. If required, for recurring items, check or clear the **Prorate Start Date** and **Prorate End Date** boxes. For details, see [Proration Options](#).
  - g. Click **Add**.
5. Repeat step 4 until you have added all items to the subscription plan.
  6. Complete any necessary additional fields, and then click **Save**.

When you save, NetSuite opens the **Price Books** subtab. After creating a subscription plan, the next task is to create a price book by creating a price plan for each item. See [Creating Price Books](#).

## Proration Options

Set the **Exclude February 29 When Prorating by Days or Months** preference in SuiteBilling to ensure that all days are prorated to the same amount regardless of the number of days in the year. When you enable this preference, NetSuite excludes February 29<sup>th</sup> when calculating prorated amounts in leap years. To locate the preference, go to Setup > Accounting > Invoicing Preferences and click the **Subscription Management** tab.

To see how to set this preference, view the video:



[Setting the Leap Year Preference](#)

On the subscription line, set the Prorate Start Date and Prorate End Date when you want to charge customers only for the portion of the charge period they use. All subscription items have the same end date as the subscription. If you leave the **Prorate Start Date** and **Prorate End Date** boxes cleared, NetSuite bills the entire charge period. In most cases, you would either check both boxes or clear both boxes.

On recurring subscription plan items:

- To set proration for the start date of an item, check the **Prorate Start Date** box.
- To set proration for the end date of an item, check the **Prorate End Date** box.

By default, if you set the Type field of a subscription plan item to Recurring, NetSuite checks the Prorate Start Date and Prorate End Date boxes.

This is what happens when you check or clear one or both of these boxes:

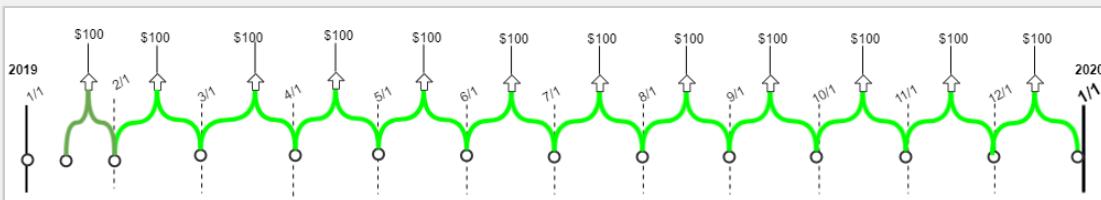
- If you check the **Prorate Start Date** box for an item, NetSuite bases the charge on the actual number of days used. If service begins after the start of the charge period, NetSuite charges the customer for the days used, not the entire charge period.
- If you clear the **Prorate Start Date** box for an item, the start date of the item is the first date in the charge period. Charges may begin earlier than the activation start date. For example, a customer

begins receiving service for a one-year subscription on December 15, and is charged for an entire year.

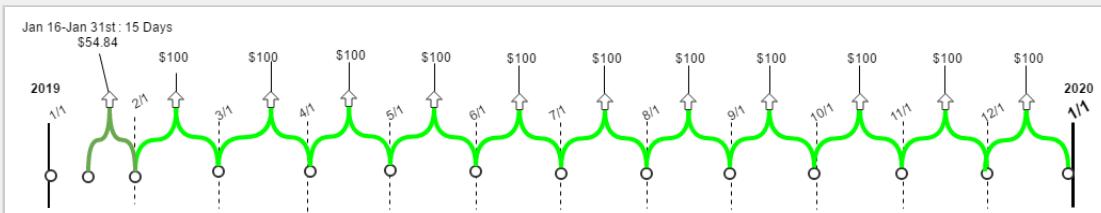
- If you check the **Prorate End Date** box for an item, NetSuite stops charges on the day the service ends. If service ends before the full charge period is complete, NetSuite bills the customer only for the days used.
- If you clear the **Prorate End Date** box for an item, the end date of the item is the last day in the charge period. Charges may extend past the subscription end date. For example, a customer cancels their phone subscription on December 15 but continues to be charged up to and including December 31.

**Example:** A subscription with a 12-month term and charge frequency set to monthly is activated on January 15. Each item represents one month of service with a charge to the customer of \$100 US.

If you clear the **Prorate Start Date** and **Prorate End Date** boxes, the customer is billed the full monthly cost for January.



If you check the **Prorate Start Date** and **Prorate End Date** boxes, the charge for the month of January is reduced to \$54.84. This reduced charge is based on the actual number of service days the customer received. If the line is terminated prior to 12/31/2019, the end charge is also not a full charge.



## Creating Price Books

After you save a subscription plan, you can create pricing for the items. A price book defines the pricing for a collection of items or services that are sold as part of a subscription plan. Every item on a subscription plan must be assigned to a price plan within the price book. A subscription plan can have one or multiple price books. You can use multiple price books to create different pricing options, such as multiple currencies, or monthly, quarterly, and annual pricing.

To learn how to set up a subscription plan and price book in NetSuite, view the video:



For high-level overview diagrams of the workflows that include this procedure, see [Subscription Plan Creation](#), [New Stand-Alone Subscription Creation](#), and [Subscription Creation from a Sales Order](#).

### To create a price book:

1. On the saved subscription plan record, click the **Price Books** subtab. This subtab opens by default after you save a subscription plan.

2. Click **New Price Book**.
3. On the price book record, in the **Name** field, enter a name for the price book.
4. From the **Currency** list, select the appropriate currency.
5. On the **Price Book Lines** subtab, in the **Edit** column, click the edit icon  for an item to make its price plan. For instructions on making price plans, see [Creating Price Books](#).



**Note:** You must complete a price plan for every item before you can save the price book. Complete the required fields on the price plan, and then click **Save** to return to the price book record.

6. From the **Interval** list (if showing), select the time period to set the duration of the interval. You can choose **Day**, **Week**, **Month**, or **Year**.
7. In the **Start On** field, enter a number for when the interval will begin.

For example, you set the **Interval** to **Month** and the **Start On** field to **1** (one). The interval runs from month 1 until the end of the term. If you create a subscription from this plan, NetSuite converts the relative dates to real dates based on the subscription start date. If you set the start date of the subscription to January 1 and the **Start On** field to 1, the interval will start on January 1.

**Example:** The following example price book, AAA Basic Plan Pricing, has currency in US dollars. The three items associated with the price book include a one-time item, a recurring item, and a usage item.

Primary Information		INITIAL TERM	DESCRIPTION																																																																													
SUBSCRIPTION PLAN NAME AAA Vending Basic Plan	DISPLAY NAME/CODE	One Year																																																																														
Classification		DEPARTMENT	LOCATION																																																																													
SUBSIDIARY Parent Company	INCLUDE CHILDREN	CLASS																																																																														
Lines	Price Books	Renewal	Accounting																																																																													
Related Records	Communication	System Information																																																																														
Price Book																																																																																
<table border="1"> <thead> <tr> <th>NAME</th> <th>EXPAND ALL</th> <th>CURRENCY</th> <th>ITEM</th> <th>TYPE</th> <th>QUANTITY</th> <th>DISCOUNT</th> <th>PRICE</th> <th>CHARGE FREQUENCY</th> <th>REPEAT EVERY</th> <th>PRICING MODEL</th> </tr> </thead> <tbody> <tr> <td>AAA Basic Plan Pricing</td> <td></td> <td>USA</td> <td>NFT - Vending Setup</td> <td>One Time</td> <td></td> <td>Above 0:</td> <td>\$250.00</td> <td>One Time</td> <td>0</td> <td>Tiered</td> </tr> <tr> <td></td> <td></td> <td></td> <td>NFT - Refrigerator Rental &amp; Stocking</td> <td>Recurring</td> <td></td> <td>From 0:</td> <td>\$50.00</td> <td>Monthly</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>From 3:</td> <td>\$45.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>From 5:</td> <td>\$40.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td>NFT - Soda 12oz Can</td> <td>Usage</td> <td></td> <td>12 Included</td> <td></td> <td>Monthly</td> <td></td> <td>1 Volume</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>From 0:</td> <td>\$0.25</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>				NAME	EXPAND ALL	CURRENCY	ITEM	TYPE	QUANTITY	DISCOUNT	PRICE	CHARGE FREQUENCY	REPEAT EVERY	PRICING MODEL	AAA Basic Plan Pricing		USA	NFT - Vending Setup	One Time		Above 0:	\$250.00	One Time	0	Tiered				NFT - Refrigerator Rental & Stocking	Recurring		From 0:	\$50.00	Monthly									From 3:	\$45.00										From 5:	\$40.00							NFT - Soda 12oz Can	Usage		12 Included		Monthly		1 Volume							From 0:	\$0.25			
NAME	EXPAND ALL	CURRENCY	ITEM	TYPE	QUANTITY	DISCOUNT	PRICE	CHARGE FREQUENCY	REPEAT EVERY	PRICING MODEL																																																																						
AAA Basic Plan Pricing		USA	NFT - Vending Setup	One Time		Above 0:	\$250.00	One Time	0	Tiered																																																																						
			NFT - Refrigerator Rental & Stocking	Recurring		From 0:	\$50.00	Monthly																																																																								
						From 3:	\$45.00																																																																									
						From 5:	\$40.00																																																																									
			NFT - Soda 12oz Can	Usage		12 Included		Monthly		1 Volume																																																																						
						From 0:	\$0.25																																																																									

8. (Optional) In the **Included Quantity Multiplier** column, enter a number. For more information, see [Creating Usage Records](#).
9. (Optional) If you want to enter a default discount, enter the discount in the **Discount** column. You can enter a discount as a percentage or as a flat rate discount. To enter a percentage discount, include the percentage sign (%) after the positive number you enter in the **Discount** field. Flat rate discounts do not need a notation. For details, see [Applying Discounts to Subscriptions](#).
10. From the **Charge Frequency** list, select **Weekly**, **Monthly**, or **Annually**.
11. Unless the item is a one-time item, select a number from the **Repeat Every** list for how often you want the charge to occur.

For example, if you want to charge monthly, select a **Monthly** from the **Charge Frequency** list and enter **1** in the **Repeat Every** field.

**Example:** The following example shows a basic price book with tiered pricing (line 1) and volume pricing (line 2), charge frequency, and recurrence. Notice that no discounts are included in the following price book example.

The screenshot shows two separate Price Book screens. Both screens have a header with 'Save', 'Cancel', 'Customize Form', and 'Actions' buttons.

**Primary Information:**

- NAME \***: PB 2
- (SUBSCRIPTION PLAN)**: Medical Records Management Plan 2

**Price Book Lines •**

**Add Interval To All**

LINE NUMBER	REQUIRED	ITEM	LINE TYPE	INTERVAL *	START ON *	PRICE	EDIT	INCLUDED QUANTITY MULTIPLIER	DISCOUNT	CHARGE FREQUENCY	REPEAT EVERY *
1		Records Management	Recurring	Month	1	Above 0: \$32.00	<input type="button" value="Edit"/>			Monthly	1
1		Records Management	Recurring	Month	4	Above 0: \$32.00 Above 1: \$34.00	<input type="button" value="Edit"/>			Monthly	1
2		File Storage	Usage	Month	1	5 Included From 0: \$42.00	<input type="button" value="Edit"/>			Monthly	1
2		File Storage	Usage	Month	4	5 Included From 0: \$42.00 From 6: \$44.00	<input type="button" value="Edit"/>			Monthly	1

**Price Book Lines •**

ITEM	SUBSCRIPTION LINE TYPE	PRICE	INCLUDED QUANTITY MULTIPLIER	DISCOUNT	CHARGE FREQUENCY	REPEAT EVERY
NFT - Vending Setup	One Time	Above 0: \$250.00 <input type="button" value="Edit"/>			One Time	0
NFT - Refrigerator Rental & Stocking	Recurring	From 0: \$50.00 <input type="button" value="Edit"/> From 3: \$45.00 From 5: \$40.00			Monthly	1
NFT - Soda 12oz Can	Usage	12 Included From 0: \$0.25 <input type="button" value="Edit"/>	NFT - Refrigerator Ren... Stocking - Recurring <input type="button" value="Edit"/>		Monthly	1

12. From the **Prorate By** column, select Month or Day.

**Tip:** Prorate By Month creates a rounded charge for the billing period. For example, a 12-month subscription costs \$12,000 that is billed monthly. If you select Prorate By Month, the charge for each month is rounded to \$1,000. However, if you select Prorate By Day for the same subscription, the monthly charge varies from \$920.55 to \$1,019.18 depending on the number of days in the month.

**Example:** When you enable proration for an item, NetSuite creates charges based on the number of days or months in the charge period. The default Prorate By setting for all recurring items is Day.

The screenshot shows the 'Price Book' creation screen. At the top, there are buttons for 'Save', 'Cancel', 'Customize Form', and 'Actions'. Below this is the 'Primary Information' section with a 'NAME \*' field containing 'PB1' and a note '(SUBSCRIPTION PLAN) Prorate By Month Annual'. The main area is titled 'Price Book Lines \*' and contains a table with two rows. The columns are: LINE NUMBER, REQUIRED, ITEM, LINE TYPE, INTERVAL \*, START ON \*, INCLUDED QUANTITY MULTIPLIER, PRICE, EDIT, DISCOUNT, CHARGE FREQUENCY \*, REPEAT EVERY \*, and PRORATE BY. Row 1: Labor 1, Recurring, Month, 1, Above 0: \$12,000.00, Annually, 1, Month. Row 2: Labor 2, Recurring, Month, 1, Above 0: \$300.00, Monthly, 3, Month. A red box highlights the 'PRORATE BY' column.

LINE NUMBER	REQUIRED	ITEM	LINE TYPE	INTERVAL *	START ON *	INCLUDED QUANTITY MULTIPLIER	PRICE	EDIT	DISCOUNT	CHARGE FREQUENCY *	REPEAT EVERY *	PRORATE BY
1	Yes	Labor 1	Recurring	Month	1		Above 0: \$12,000.00			Annually	1	Month
2	Yes	Labor 2	Recurring	Month	1		Above 0: \$300.00			Monthly	3	Month

13. Repeat all of the previous steps for each price book item until all have pricing information.
14. Click **Save**.

## Setting Up Standard Pricing

If you have the System Administrator role, you can set up standard pricing that other users cannot modify.

### To set up standard pricing that other users cannot change:

1. Grant access permission to a subscription process with the following restrictions:
  - Limit the number of users who can edit the subscription pricing.
  - Reduce the permissions to edit a specific price plan, subscription change order, or price book.
 When you restrict access, users with roles other than System Administrator can change a subscription item discount or quantity but not the price plan unless they have price plan permissions. For instructions on how to grant roles the access permission to a subscription process, see the help topic [Setting Permissions](#).

## Copying a Price Book

You can copy a price book to save effort in filling out all the fields for a similar price book. For example, you might want to copy a price book when creating pricing books for different currencies.

### To copy a price book:

1. Open the price book record you want to copy.
2. From the **Actions** menu, select **Make Copy**.
3. Edit the copy with any needed changes.
4. Click **Save**.

## Deleting a Price Book

You can delete a price book that has not been used to create any subscriptions.

### To delete a price book:

1. Open the price book record you want to delete.
2. From the **Actions** menu, select **Delete**.

## Creating Price Plans

Every item in a subscription plan must have an associated price plan. You must create price plans for every pricing interval in a price book.

When creating a price plan, the quantity for each item must be greater than zero (0). When you modify the price plan, you cannot set the quantity to zero (0) or a negative number.



**Note:** Volume pricing charges all units at the price tier based on the quantity.

For high-level overview diagrams of the workflows that include this procedure, see [Subscription Plan Creation](#), [New Stand-Alone Subscription Creation](#), and [Subscription Creation from a Sales Order](#).

### To create a price plan:

1. From the **Price Books** subtab of the subscription plan record, select an existing price book record. If you have not already created a price book, follow the instructions in [Creating Price Books](#).
2. Configure the price plan:
  - a. Click the edit icon for an item. The price plan window opens.



**Note:** You also can click the edit icon to edit an existing price plan.

- b. From the **Type** list, select one of the following:
  - **Tiered** – Most commonly used for recurring items. Tiered pricing charges a specified rate for all items sold in the tier (for example, the first 10 items). When the quantity sold exceeds the upper limit for the tier, NetSuite charges the price specified for the next tier for the additional items.

#### Example:

A beverage subscription with tiered pricing includes the following pricing levels:

Quantity tier 1: For 0–10 items, the price is \$5.00

Quantity tier 2: For 11–20 items, the price is \$4.95

Quantity tier 3: For 21+ items, the price is \$4.90

If a customer orders 22 items, the charge is  $(10 \times \$5.00) + (10 \times \$4.95) + (2 \times \$4.90) = \$109.30$ .

- **Volume** – Most commonly used for usage pricing. For volume pricing, the total quantity sold defines the charge rate for all items in the order.

#### Example:

A beverage subscription with volume pricing includes the following pricing levels:

Volume tier 1: For 0–10 items, the price is \$5.00

Volume tier 2: For 11–20 items, the price is \$4.95

If the customer orders eight items, the per item charge for the order is \$5.00. The total charge is  $(8 \times \$5.00) = \$40$ . If the customer orders 22 items, the per item charge for the order drops to \$4.95. The total charge is  $(22 \times \$4.95) = \$108.90$ .

When you create a price plan, you can set minimum and maximum amount limits for pricing tiers. See [Price Plan Minimum and Maximum Amounts](#).

- c. From the **Pricing Option** list, select one of the following options:
  - **Rate** – Calculates the item amount as (quantity x rate).
  - **Fixed Amount** – The item's defined charge amount is not affected by its quantity.
- d. In the **Value** field, enter an amount to charge for the item.
- e. To add more pricing for additional quantities, click **Add**.
3. Repeat step 2 for each subsequent item in the price book. Every item in a subscription plan must have an associated price plan.
4. Click **Save** to submit the price plan. NetSuite returns to the Price Book page and displays the new price plan in the item columns.
5. From the **Charge Frequency** list, select **Weekly**, **Monthly**, or **Annually**.
6. Unless the item is a one-time item, from the **Repeat Every** list, enter a number for how often you want the charge to occur. For example, if you want to charge monthly, select **Monthly** from the **Charge Frequency** list and enter **1** in the **Repeat Every** field.
7. Click **Save** to save the price book.

## Price Plan Minimum and Maximum Amounts

You can set minimum and maximum amount limits for pricing tiers.

Consider the following pricing tier examples. The prices and discounts are structured in tiers based on the quantity purchased:

- 0–100 recurring licenses purchased cost \$3.00 each.
- 101–200 recurring licenses purchased cost \$2.00 each.
- 201+ recurring licenses purchased cost \$1.00 each.

You can enter a minimum amount of \$150. This forces customers to purchase at least 50 recurring licenses, even if the item has a quantity of only 1.

You may also have a discount in which after a certain price is reached, the cost for your customers does not increase. If you enter a maximum charge of \$500.00, the customer does not have to pay for additional licenses after they have spent \$500.

A volume tier can have a maximum price. But in most cases, a maximum price is needed only for the tier with the highest number range.

When a change order changes the price plan mid-period, NetSuite prorates the minimum and maximum amounts.

**Example:** A customer subscribes to your news website. The minimum charge is \$10. You submit a change order on April 13. For April 1–12, NetSuite prorates the minimum charge as days used so far divided by total days in the month, multiplied by the minimum charge:

$$4 = (12 \div 30) \times 10$$

For April 13–30 (18 days), NetSuite prorates the minimum as days remaining divided by total days in the month, multiplied by the minimum charge:

$$6 = (18 \div 30) \times 10$$

# Time-Based Pricing

Use the Time-Based Pricing feature to create pricing models that have planned pricing changes over time, also known as interval pricing models. Examples include free trials, ramp pricing, and introductory pricing. You use Time-Based Pricing to create intervals for price, quantity, or discount changes over time.

You can define how charges are calculated for time intervals during a subscription's term. For example, you offer a one-year subscription with an introductory pricing plan. A reduced price applies for the first three months and full price applies for the last nine months of the subscription's term. To set up this price plan, you add an interval for the item and set it to start on the fourth month without a discount.

For instructions on enabling Time-Based Pricing, see [Enabling SuiteBilling Features](#).

To learn how to create a subscription plan, price book, and price plans with Time-Based Pricing in NetSuite, view the video:

 [Creating a Subscription Plan, Price Book, and Price Plans with Time-Based Pricing](#)

 **Note:** If you use the SuiteBilling Enhanced UI SuiteApp (formerly called the Time-Based Pricing SuiteApp) with the Time-Based Pricing feature, see [Subscription Billing Enhanced UI](#).

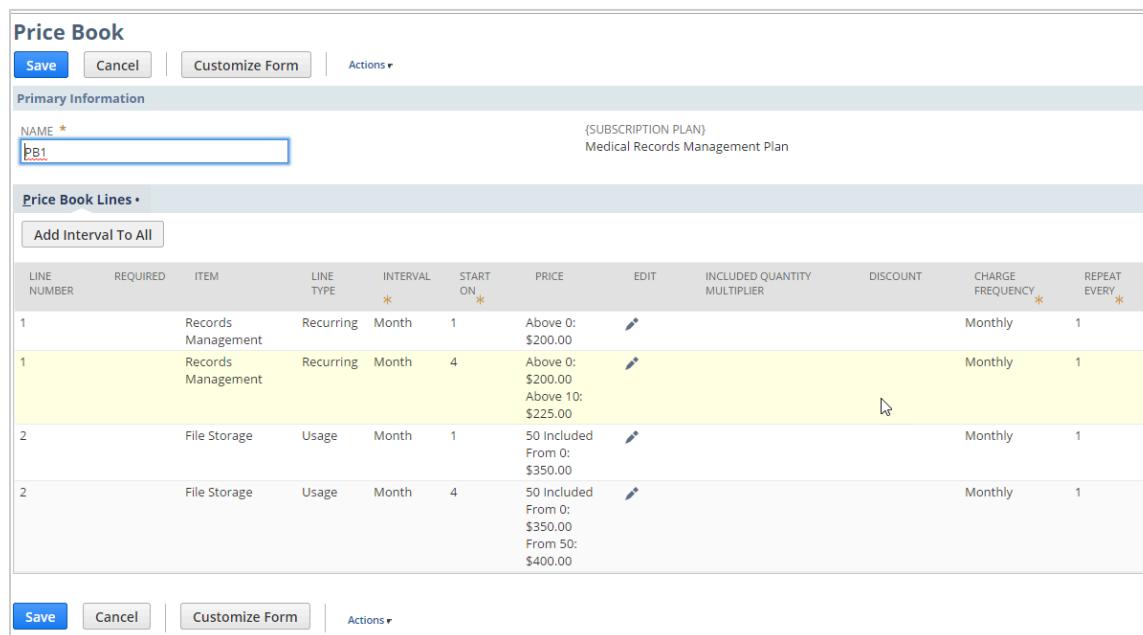
## Creating a Price Plan with Intervals for Time-Based Pricing

You can apply a single price interval to all items on a price plan at once, or you can define different price intervals for each item.

You also can use the Time-Based Pricing feature to add a price interval to all items in the price book and subscription level.

Before creating a price interval, you must have a subscription plan, price book, and price plan. See [Creating Items for Subscription Plans](#), [Creating Subscription Plans](#), and [Creating Price Books](#).

The following example shows a subscription that includes two subscription line items, each with two price intervals. For each item, the new price takes effect in the 4th month.



The screenshot shows the 'Price Book' screen in NetSuite. The 'Primary Information' section has 'NAME \*' set to 'PB1'. The 'Price Book Lines' section contains two items:

LINE NUMBER	REQUIRED	ITEM	LINE TYPE	INTERVAL *	START ON *	PRICE	EDIT	INCLUDED QUANTITY MULTIPLIER	DISCOUNT	CHARGE FREQUENCY *	REPEAT EVERY *
1		Records Management	Recurring	Month	1	Above 0: \$200.00				Monthly	1
1		Records Management	Recurring	Month	4	Above 0: \$200.00 Above 10: \$225.00				Monthly	1
2		File Storage	Usage	Month	1	50 Included From 0: \$350.00				Monthly	1
2		File Storage	Usage	Month	4	50 Included From 0: \$350.00 From 50: \$400.00				Monthly	1

At the bottom, there are 'Save', 'Cancel', 'Customize Form', and 'Actions' buttons.

To create a price interval, you must configure the price plan as described in the following procedures.

## Adding a Price Interval To All Items At Once

You can simultaneously add a price interval to all items in a subscription.

### To add a price interval to all items in a subscription:

1. From the subscription plan on the **Price Book** subtab, click the edit icon  for an item. The price plan window opens.
- Note:** Items set up for one-time pricing cannot have more than one price interval.
2. Click **Add Interval to All** to add a price interval to all items at once rather than creating separate price intervals for multiple individual items.
  3. Edit the price, discount, or quantity for the new price interval. For example, to create a price interval that starts after the subscription start date, change the **Start On** value.
- Note:** Price interval items that are located next to each other must be unique. If you have two identical adjacent price intervals, NetSuite combines the items from each into one price interval.
4. Click **Save** to save the intervals in your price plan.
  5. When you have completed configuring the price interval for all items, click **Save** to save the price book. The **Interval** and **Start On** columns appear on the price book, as shown in the following image. For information on these columns of the price book, see steps 6 and 7 of [Creating Price Books](#).

## Adding a Price Interval To a Single Item

You can add a price interval to one subscription item at a time.

### To add a price interval to a single item in a subscription:

1. Select the item with the price plan you want, and click **Make Copy**.
- Tip:** When you copy a price interval, you save the effort of completing all the fields that a new price interval requires. For example, if you have tiered pricing and do not want to recreate the tiers for each new price interval.
2. Click the edit icon  for an item. The price plan window opens.
  3. Edit the price, discount, or quantity for the new price interval. For example, to create a price interval that starts after the subscription start date, change the **Start On** value.
- Note:** Price interval items that are located next to each other must be unique. If you have two identical adjacent price intervals, NetSuite combines the items from each into one price interval.
4. Click **Save** to save the intervals in your price plan.
  5. Repeat steps 2–4 for each subsequent item in the price book.
  6. When you have completed configuring all intervals, click **Save** to save the price book. The **Interval** and **Start On** columns appear on the price book, as shown in the preceding image. For information on these columns of the price book, see steps 6 and 7 of [Creating Price Books](#).

## Deleting a Price Interval

You can delete a price interval when the subscription item is in the Draft status.

### To delete a price interval:

1. Select the price interval you want to delete.
2. Click **Remove**.

## Creating Billing Accounts

A billing account record shows all billing information, including the billing schedule, default payment terms, ship-to address, and currency, for a customer or sub-customer.

To enable billing accounts, you must first set the Consolidate Projects on Sales Transactions preference and enable the Charge-Based Billing and Billing Accounts features. For more information, see [Setting the SuiteBilling Preferences](#) and [Enabling SuiteBilling Features](#).

If you have multiple billing accounts for a customer, NetSuite uses the billing account marked as customer default when creating transactions. For example, when creating a new invoice or new subscription, NetSuite assigns the default customer billing account. On the billing account record, you can change the start date of a billing account only if it is not yet used in an active subscription.

A single company may choose to set up multiple billing accounts to accommodate different billing schedules. For example, they may want to bill recurring annual charges in advance and bill usage monthly, with a separate billing account for each.

**Use Case Example:** A coffee shop franchise purchases software using multiple billing accounts as follows:

- The licensing fees and maintenance are billed to the parent company annually on January 1st. This is the first billing account, with a fixed bill date of January 1st and the address of the parent company used as the ship to address and bill to address.
- The usage for the service is billed to the individual locations. For each location, there is a separate billing account with a monthly billing schedule. The bill to address and ship to address for each account correspond to the individual franchise location.

### To create a new billing account:

1. Go to Lists > Relationships > Billing Accounts > New.
2. If required, from the **Subsidiary** list, select a subsidiary or change the subsidiary from the primary subsidiary to a secondary subsidiary.
3. Indicate the customer for whom you are creating a billing account:
  - For an existing customer, select the customer name.
  - To create a new customer, click the plus icon.
4. From the **Currency** list, select the customer's currency.
5. From the **Billing Schedule** list, select a billing schedule.
6. Enter or select a **Start Date**.



**Note:** After you click **Save**, you will not be able to:

- remove the subsidiary from this customer
- delete billing accounts related to this customer and their secondary subsidiaries

7. Click **Save**.

The following screen is an example of a completed Billing Account record.

**Billing Account**

**Primary Information**

ACCOUNT NUMBER BA_1002	NAME BA_1002	CURRENCY USA
<input checked="" type="checkbox"/> CUSTOMER DEFAULT	ACCOUNT DESCRIPTION	<input type="checkbox"/> INACTIVE
CUSTOMER CAN Cust USD		

**Billing**

BILLING SCHEDULE Basic	START DATE 4/1/2020	NEXT BILL CYCLE DATE 4/26/2020
FREQUENCY Monthly	LAST BILL CYCLE DATE	LAST BILL DATE
<input checked="" type="checkbox"/> USE OFF-CYCLE INVOICE FOR ADVANCE CHARGES		

**Classifications**

SUBSIDIARY CAN Subsid	DEPARTMENT	LOCATION CAN ONLY LOCATION
CLASS CAN ONLY CLASS		

**Related Records** Address Preferences System Notes

**Subscriptions** Billing Schedule • Off-Cycle Request Charges Transactions

You also can create a new billing account while you are working in several other records, such as the Customer record and the Subscription record. To create a new billing account from the Customer record, on the **Billing Account** subtab, click **-New-**. Follow the instructions above. To create a new billing account while creating a new subscriptions, see [Creating a New Stand-Alone Subscription](#).

## Viewing Records Related to the Billing Account

You can view a list of records related to the billing account, such as subscription records, charge records, and billing schedules.

### To view records related to the billing account:

1. Go to the Billing Account page.
2. Click the **Related Records** tab.

## Billing Addresses

The Bill-To Select list on the billing account determines the billing address for invoices, cash sales, and credit memos associated with the billing account. If you do not select a billing address, NetSuite uses the default billing address defined on the customer record. If needed, you can change the billing address on the billing account.

Customers with multiple subscriptions on the same billing account receive one single invoice based on the billing schedule defined by the billing account.

The Ship-to Select list on the billing account works the same as the Bill-To select. This determines the shipping address. If no shipping address is selected, NetSuite uses the default shipping address defined on the customer record.

## Billing Schedules

Billing accounts work with charge-based billing schedules. Charge-based billing schedules support two types of recurrence patterns:

- Fixed bill date billing schedules indicate that the recurring invoice is generated on a fixed-date basis. Billing is based on the selected bill date, frequency, recurrence frequency, and Repeat Every settings. Fixed date billing schedules work best when you want to invoice customers on a specific day of the month, or any other specific frequency.
- Anniversary bill date billing schedules indicate that the recurring invoice is generated on an anniversary date basis. Billing is based on the billing account start date, frequency, recurrence frequency, and Repeat Every settings. Use the anniversary bill date billing schedule to invoice the customer on the same date each year as the service start date.

If you define a billing schedule with a date that does not exist in every month, the billing schedule adjusts accordingly. For example, if you specify billing on the 31st, for months that have fewer days, NetSuite bills on the last day of that month. February 28th and April 30th are two examples.

## Changing the Billing Date for Future Invoices to a Billing Account

You must have edit permissions for billing accounts to change the next bill cycle date.

### To change the billing date for future invoices to a billing account:

1. Go to the saved a billing account with an associated billing schedule.
2. From the Next Bill Cycle Date list, change the date for the next bill cycle.

The list shows the possible dates for which you can advance the billing date up to a maximum of 10 billing cycles.

You can move the next bill date backward, but only to the next bill date after the creation cycle of the latest recurring invoice. For example, you prematurely generate a bill run and need to perform a bill run for the first bill cycle date. You can accomplish this by moving the next bill date backward.

## Creating Recurring Invoices for Subscriptions with Billing Accounts

You can create subscription invoices that automatically recur with a designated frequency.

Usage must be billed in arrears, but recurring and one-time charges can be billed in advance. For example, bill from the electric company is based on your usage and is billed in arrears. To generate revenue as early as possible, most SuiteBilling customers bill recurring charges in advance. For example,

cable and internet service companies bill their customers for the coming month at the beginning of the billing cycle. Charges begin the day the service is activated.

There are several ways to create a recurring invoice with a billing account.

### To create a recurring invoice with a billing account:

1. Go to Lists > Relationships > Billing Accounts.
2. Click **View** next to the billing account for which you want to create a recurring invoice.
3. Click the **Next Bill** button.



**Note:** You also can create a recurring invoice by clicking the **Next Bill** button from the **Billing Account** subtab of the customer record.

The Create Invoice page opens with the **Recurring Bill** box checked. The invoice date defaults to the next bill date on the billing account.

In addition, you can create a recurring invoice the following ways:

- Invoicing billable customers from the Invoice Customers page
- Using Billing Operations (Process Billing Operations and Schedule Billing Operations)
- Creating invoices from the Invoice page

For each customer, NetSuite reviews all billing accounts eligible for a bill run. NetSuite creates one recurring invoice per billing account per period when there are charges. To send an invoice to your customers, you can generate a statement of the bill run.

NetSuite uses the next bill cycle date on the billing account to determine the invoice date. When NetSuite creates the invoice, the Last Bill Cycle Date and the Last Bill Date change to the date of the invoice. The Next Bill Cycle Date advances to the next billing date. If you delete the invoice, the Last Bill Cycle Date and the Next Bill Cycle Date return to the date they were before you generated the invoice. Also, the Last Bill Date changes to the date of the previous bill.

## Using Billing Accounts with Off-Cycle Invoices

Use off-cycle invoices to bill for charges that require immediate (mid-cycle) billing. NetSuite uses the date on which you manually enter the invoice as the invoice date.

### To create an off-cycle invoice using a billing account:

1. Go to Transactions > Sales > Create Invoices > List.
2. Click the Edit link for the invoice for which you want to create an off-cycle invoice.
3. Clear the **Recurring Bill** box.

When you create the invoice, the Last Bill Date updates to the date of the invoice. When you delete an invoice, the Last Bill Date changes to the date of the previous bill.

## Renaming SuiteBilling Records

You can rename the following SuiteBilling records to better suit your specific business needs:

- Subscription

- Subscription Change Order
- Subscription Plan

When you rename a record, the new name replaces all instances of the original name in the NetSuite user interface. For example, after you change the name "subscription" to "contract," you navigate to Transactions > Contracts > Create Contracts instead of Transactions > Subscriptions > Create Subscriptions . The renamed record also appears in search links, search criteria, and search results. It does not appear in the Help Center search results or in help topics. The renamed record also appears in reports, KPIs, error messages, and alert messages.

 **Note:** If you change the name "subscription" to "contract," the feature name does not change at Setup > Company > Enable Features. The same is true with any information or error message on the Enable Features page.

If you rename the subscription record, NetSuite also renames the subscription item record and the subscription term record. For example, you change the name "subscription" to "contract." The subscription item record changes to contract item and the subscription term record changes to contract term. If you rename either the subscription change order record or the subscription plan record, it does not impact the name of any additional records.

For specific details and more information about renaming records in NetSuite, see the help topic [Renaming Records and Transactions](#). To learn more, view the video:



[Renaming Billing Records](#)

### To rename a SuiteBilling record:

1. Go to Setup > Company > Rename Records/Transactions.
2. Edit the names of the subscription billing records. For example, in the **Name for Subscription** field, you can change **Subscription** to **Contract**.
3. When you have finished renaming records, click **Save**.

### To rename a SuiteBilling record in multiple languages:

1. If you use different languages in your account, set your language preference:
  - a. Go to Home > Set Preferences.
  - b. In the Localization section, from the Search Sorting list, select your language preference.
2. Repeat the procedure [To rename a SuiteBilling record](#): for each language in your account.

# SuiteBilling Management

This chapter describes tasks that you may perform repeatedly to manage your subscription billing.

SuiteBilling subscriptions have an automated approval process that starts with the creation of each of the subscription's required parts:

- Subscription items in a subscription plan
- Pricing, including the price plan and price book
- Billing account

For instructions on how to create the prerequisite parts of a subscription, see:

- [Creating Items for Subscription Plans](#)
- [Creating Subscription Plans](#)
- [Creating Price Plans](#)
- [Creating Price Books](#)
- [Creating Billing Accounts](#)

After you have created all of the parts that make up a subscription, you can create a subscription.

To move the subscription through the approval process, you change its status using change orders. For high-level overview diagrams of creating and renewing subscriptions, see [SuiteBilling Process Diagrams](#). For more information on change orders, see [SuiteBilling Change Orders](#).

When you create a subscription, its original status is **Draft** or **Not Included**. In **Draft** status, the subscription has no revenue impact and no charge impacts. After approval, the subscription status changes to **Pending Activation**. When the subscription is activated, its status changes to **Active**. You also can manually change the status of individual subscription items.

As the subscription progresses through its lifecycle, you can make changes to the subscription or its components with change orders. If a customer decides to temporarily suspend their subscription, you can create a **Suspend** change order. When the customer is ready to restart their subscription, you can create a **Reactivate** change order.

You also use change orders to modify pricing.

You can create a subscription from a sales opportunity, estimate, or sales order. Create subscriptions based on:

- Customer
- Billing Account
- Subscription Plan
- Price Book
- Start Date
- Subscription Term
- Subscription Renewal

In addition, you can create a new stand-alone subscription without using an existing transaction or subscription.

## Creating a New Stand-Alone Subscription

A **stand-alone subscription** is a new subscription that you create on the Create Subscriptions page, rather than from another transaction such as a sales order.

You can activate a subscription only after you create and save the subscription's required components. For instructions on how to create the prerequisite parts of a subscription, see the following topics:

- [Creating Items for Subscription Plans](#)
- [Creating Subscription Plans](#)
- [Creating Price Books](#)
- [Creating Billing Accounts](#)

To see a high-level overview diagram of the process for creating a subscription plan, see [Subscription Plan Creation](#).

### To create a new stand-alone subscription:

1. Go to Transactions > Subscriptions > Create Subscriptions.
2. Select from the list or enter values for the following fields in any order:
  - Indicate the customer for whom you are creating the subscription:
    - From the **Customer** field, select an active customer from the list.
    - To create a new customer, click the plus icon next to the **Customer** field and select **-New-**.

You can select any active customer, regardless of whether they have a billing account. When you select a customer, the **Subsidiary** and **Currency** fields contain the values you specified for those fields for that customer. When you select values for the **Customer** and **Subsidiary** and leave **Currency** blank, the **Billing Account** field shows the billing accounts that are available for that customer.



**Note:** Depending on the order in which you select the values for the **Customer**, **Subsidiary**, **Currency**, and **Billing Account** fields, NetSuite fills the values of fields dependent on the Subscription and Billing Account records.

- You can set a subsidiary to use in a new billing account before creating it. If the customer has subsidiaries, indicate them as follows:
  - From the list in the **Subsidiary** field, select an active subsidiary. NetSuite populates the **Subsidiary** fields of the Subscription record with the field's values from the billing account.
  - You can change the subsidiary from the primary subsidiary to a secondary subsidiary. The subscription must be in Draft or Pending Activation status to change the subsidiary.
  - To create a new subsidiary, click the plus icon and select **-New-**.
- You can set a currency to use in a new billing account before creating it. Indicate the currency as follows:
  - From the list in the **Currency** field, select an active currency. NetSuite populates the **Currency** fields of the Subscription record with the field's values from the billing account.
  - You can change the currency when the subscription is in Draft or Pending Activation status.
  - To create a new currency, click the plus icon and select **-New-**.
- (Optional) You can create a subscription without a billing account until you activate the subscription. You can select a billing account from the list in the **Billing Account** field, or to create a new billing account, click the plus icon and select **-New-**. To create a new billing account, follow the instructions in [Creating Billing Accounts](#).

On the Subscription record, the **Customer**, **Subsidiary**, and **Currency** fields are required for creating a billing account. When you have selected a customer on the Subscription record, the **Billing Account** field contains the customer's default billing account. When all lines in the subscription are in Draft or Pending Activation status, you can change the billing account.

to another billing account for the same customer. When you select a billing account, the **Subsidiary** and **Currency** fields are read only and contain the values for those fields from the billing account.

The billing account is not required on default forms. Any automation or import templates work when you set a billing account value when you create the subscription.

You cannot activate a subscription until you select a billing account that matches the values of the **Customer**, **Currency**, and **Subsidiary** fields on the Subscription record.



**Note:** To ensure accurate data, select the **Billing Account**, **Customer**, or **Subsidiary** before selecting the subscription plan and price book

3. From the **Subscription Plan** list, select a subscription plan. The **Subscription Plan** field lists the subscription plans for the selected billing account. If you have not selected a billing account, you must select values for the **Currency** and **Subsidiary** fields to select a subscription plan.  
Only subscription plans with price books in the currency that corresponds to the selected price book currency are available to select.
4. If required, from the **Price Book** list, choose a different price book.
5. From the **Initial Term** list, select a term, or select **-New-** to define a different term.
6. In the **Start Date** field, enter or select a start date for the subscription. The default value is today's date.
7. You can define the **Class**, **Department**, and **Location** fields on the Subscription records in the Draft or Pending Activation status. These fields, located in the Plan and Term section, are useful for reporting. The values of these fields are automatically populated in the following order:
  1. If the selected subscription plan has values in any of the **Class**, **Department**, and **Location** fields, the field on the Subscription record shows its subscription plan value.
  2. If a field does not have a value in the subscription plan, NetSuite checks the billing account and the field on the Subscription record shows its billing account value, if any.
  3. If neither the subscription plan nor the billing account have values in these fields, they are empty on the Subscription record.
 If the Subscription or Subscription Line record is in Draft status, you can change the values of the **Class**, **Department**, and **Location** fields. When the Subscription or Subscription Line record is in Pending Activation or Active status, you cannot change the values of the **Class**, **Department**, and **Location** fields.
8. If required, define one or more add-on items. See [Adding Line Items to an Existing Subscription](#).
9. If Revenue Recognition is enabled, set revenue recognition options. To enable Revenue Recognition, see the help topic [Enabling the Revenue Recognition Feature](#).



**Note:** After you click **Save**, you cannot change the subscription's customer, currency, or subsidiary. In this case, you must create a new subscription.

10. Click **Save**.

If a billing account that you expect to process during billing operations does not process, run billing operations a second time or schedule billing operations for a convenient time for your business. Reasons why a billing account is not processed during billing operations include:

- A charge is created after billing operations begins processing charges.
- A single billing operation can process up to 100,000 processing lines.

Running a subsequent billing operation may process any remaining invoices. For more information on Billing Operations, see the help topic [Billing Operations](#).

After you have created the subscription, you must individually activate each line item. For more information, see [Activating Subscription Line Items](#).

After creating the subscription, you can either associate it with a sales transaction or activate it.

## Editing a Draft Subscription

You can edit a Subscription record that is in Draft status.

### To edit a draft subscription:

1. Open the Subscription record that is in Draft status if it is not already open.
2. Click **Edit**.
3. Change the values of the field or fields.

**Note:** If you change the billing account while editing the subscription, the subscription plan, price plan, and term will not reset.

4. Click **Save**.

**Note:** After you save a draft subscription, you cannot change its customer, currency, or subsidiary. In this case, you must create a new subscription.

## Creating a Subscription from a Transaction

After setting up the billing account and subscription plan, you can create a subscription from an opportunity, estimate, or sales order.

- If you convert an opportunity to an estimate, the subscription carries over to the estimate.
- If you convert an estimate to a sales order, the subscription carries over to the sales order.

To create a subscription from a transaction, you can use either one of these two approaches:

- Add a saved subscription to the transaction. Use this approach if you intend to send the sales transaction to the customer.
- Create a new sales transaction. Use this approach if you intend to use the transaction to synchronize with sales or to move lines to Pending Activation.

### To create a subscription from a transaction:

1. On the transaction record, select the customer for which you want to create a subscription.

**Tip:** You can use the Quick Search portlet or Recent Records portlet to find the desired customer record.

2. Complete any required fields based on your transaction type.

- On the **Items** subtab, from the **Subscription** list, select the subscription you want to add, or select **New** to create a new subscription.

**Tip:** Select a subscription to add if you plan to send the sales transaction to the customer. Select New if you plan to use the transaction to synchronize with sales or move lines to Pending Activation. See [Updating a Subscription on a Transaction](#) and [Activating Subscription Line Items](#).



**Note:** Only draft subscriptions are available to add to sales transactions.

- If you select an existing subscription, click **Save**.
- If you select **-New-**:
  - Enter a **Subscription Name**.
  - From the **Billing Account** list, select the billing account you want to use.



**Note:** To ensure accurate data, select the **Billing Account**, **Customer**, or **Subsidiary** before selecting the subscription plan and price book

- From the **Subscription Plan** list, select the subscription plan you want to use or select **New** to create a new subscription plan.
- From the **Initial Term** list, select an initial term for the subscription.
- Enter or select a **Start Date**.

- Click **Add** to add the subscription to the transaction.
- Click **Save**.

If you enabled the [Setting Optional Preferences](#) preference, approve the sales order. NetSuite automatically moves all subscription lines to Pending Activation.

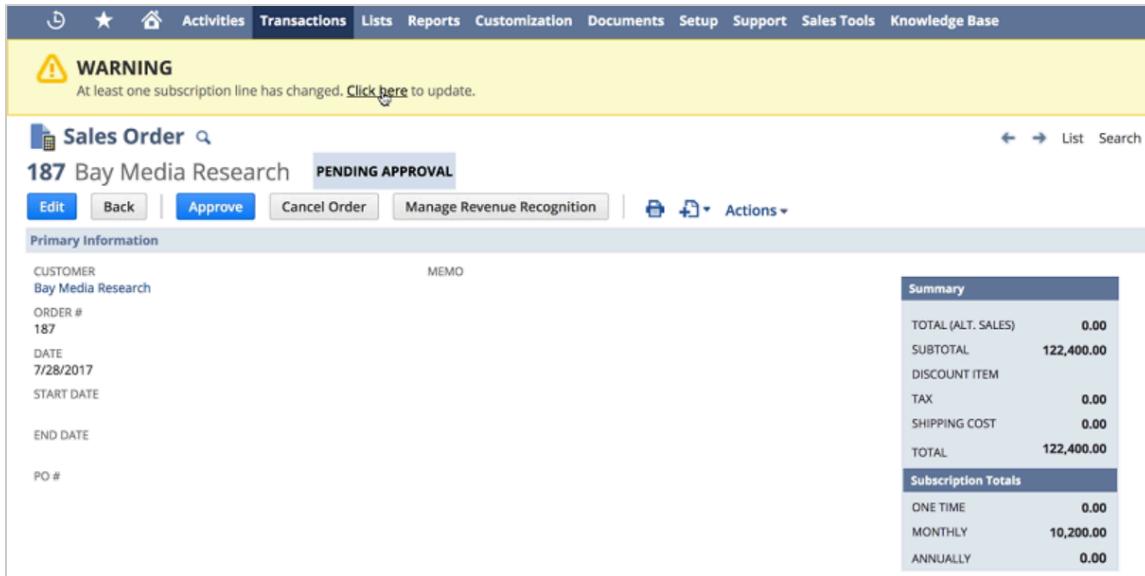
For information on creating a new subscription plan, see [Creating Subscription Plans](#).

## Updating a Subscription on a Transaction

You can update the associated sales transactions with any updates made to a subscription. Updating this information ensures that the transaction reflects the correct subscription information and totals.

Subscriptions must be in the **Draft** status. When a subscription enters the **Pending Activation** status, you can no longer update the associated sales transactions with any updates made to the subscription.

When a sales transaction needs updating, NetSuite displays a warning message in the top left corner of the screen.



### To update the subscription information in a sales transaction:

1. Go to the sales transaction associated with the modified subscription.
2. In the warning message, click the link to update the subscription information.
3. To save the updated sales transaction, click **Save**.

## Using Item Records

### Activating Subscription Line Items

After creating a new subscription or adding items to an existing subscription, you need to individually activate all items. To activate an item, it must include all information for the subscription, such as pricing, quantity, and so on. After an item with all the information relevant to a subscription is activated, it becomes a **line item**.

If a subscription line item is not activated, it is not included with the subscription when the subscription is activated. Required subscription line items must be activated to activate the subscription.

**Note:** Steps 1-3 in the following procedure pertain only to stand-alone subscriptions and Add-On Items added mid-subscription term.

### To activate subscription line items:

1. Go to Transactions > Subscriptions > Create Subscriptions > List.

- For the subscription you want to edit, click the subscription name or **Edit**.



**Tip:** To find the subscription, you can:

- Look in the **Recent Records** tab for recently completed subscriptions.
- Enter the subscription name or subscription ID into the Global Search field.

- On the **Lines** subtab of the Subscription page, for each subscription line item:
  - Click **Edit**.
  - Change the status to **Pending Activation**.
  - Click **Save**.
- Click **Activate**.
- On the Subscription Change Order – Activate page:
  - Edit the Effective Date if desired.
  - For each line item, check the **Apply** box.
  - Click **Save**.

## Adding Line Items to an Existing Subscription

Enable the Add-On Items feature if you want to add items to an existing subscription. To enable the Add-On Items feature, see [Enabling SuiteBilling Features](#).

You can add additional line items to a subscription at any time, even after the start of the subscription. On the **Lines** subtab of the subscription, in the Catalog Type column, these new line items are identified as Add-On. After you add an add-on item to the subscription, that item follows the same workflow as any subscription line item.

You can add multiple subscription line items at one time.

Add-on items are optional. You set the price of each add-on item as you create it. There is no predefined pricing. You can add any service or non-inventory item that is defined in the subscription catalog to a subscription. Once saved, an add-on item is treated the same as any subscription line item and can be moved to **Pending Activation**, then activated.

You can prorate recurring add-on items but not one-time or usage line items.

You can prorate charges by month or day.



**Note:** You can modify the Prorate By setting only when the recurring subscription item status is **Draft**.

**Example:** The following table shows the difference in charges with Proration By Day enabled versus Proration By Month for a 12-month contract:

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Days in Month	31	28	31	30	31	30	31	31	30	31	30	31
Monthly Charge with Prorate By Day Enabled	1,019.18	920.55	1,019.18	1,019.18	1,019.18	1,019.18	1,019.18	1,019.18	1,019.18	1,019.18	1,019.18	1,019.18

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Monthly Charge with Prorate By Month Enabled	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000

For more information and an example, see the help topic [Proration Options](#).

Included quantity multipliers are not permitted for usage-based add-on items. You cannot define recurring add-on items as an included quantity multiplier for any usage line items. For more information about pricing, see [Creating Price Books](#).

### To add a new line item to a subscription:

1. Go to Transactions > Subscriptions > Create Subscriptions > List.
2. For the subscription you want to edit, click the subscription name.
3. On the Subscription record, click **Edit**.

A new item with the Catalog Type set to Add-On appears at the bottom of the page.

Subscription Change Orders											
INCLUDE	LINE NUMBER	ITEM*	SUBSCRIPTION LINE TYPE*	CATALOG TYPE*	BILLING MODE*	STATUS*	START DATE	RECURRANCE START DATE	END DATE	TERMIN DATE	
Yes	1	Initial Setup	One Time	Required	In Advance	Active	11/6/2018		11/6/2018		
Yes	2	Usage	Usage	Required	In Arrears	Active	11/6/2018	12/1/2018	11/5/2019		
Yes	3	Quarterly Recurring Subscription Service	Recurring	Required	In Advance	Active	11/6/2018	12/1/2018	11/5/2019		
<input checked="" type="checkbox"/>				Add-On	Draft						
<input type="button" value="Add"/> <input type="button" value="Cancel"/> <input type="button" value="Remove"/>											

4. On the **Lines** subtab, complete the information for the add-on item:
  - a. In the **Item** column, select the item you want to add.
  - b. In the **Subscription Line Type** column, select the appropriate line type: One Time, Recurring, or Usage.
  - c. Review the following fields and update the values if needed:
    - **Include** – The box is checked by default to include this item in the subscription.
    - **Billing Mode** – From the list, select the required billing mode: In Advance or In Arrears.
    - **Prorate Start Date** and **Prorate End Date** – Click in the field to display the check box and turn proration on or off as required.
    - **Include in Renewal Subscription** – Click in the field to display the check box. Check the box to include this item in any future renewals.
    - **Revenue Recognition Option** – Select one of the following options:
      - **One Time** – Select this option if available to recognize revenue one time at the beginning of the term (for example, for setup fees).
      - **Over subscription term** – Select this option to recognize revenue over the term of the subscription.
  - d. Click **Add**.
5. On the **Pricing** subtab, add pricing information for the new line item:
  - a. In the **Charge Frequency** column, for recurring or usage line items, select the appropriate charge frequency: **monthly**, **weekly**, or **annually**.
  - b. In the **Repeat Every** column, select the appropriate option.

**Tip:** For a monthly charge frequency, in the Charge Frequency column, select Monthly, and in the Repeat Every column, select 1. For a quarterly charge frequency, in the Charge Frequency column, select Monthly, and in the Repeat Every column, select 3.

The **Repeat Every** column on the subscription pricing line is an integer field. **Repeat Every** can be any positive integer, so you can create non-standard charge frequencies as needed. **Repeat Every** must be a positive integer between 1 and 120 for Weekly charge frequency, between 1 and 120 for Monthly charge frequency, or between 1 and 10 for Annual charge frequency.

- c. Click the edit icon.
- d. In the **Pricing Option** column, select **Fixed Amount** or **Rate**.
- e. In the **Value** column, enter the price.
- f. In the **Prorate By** column, if desired, change the default setting of Day to Month. For example, a 12-month subscription costs \$12,000 and is billed monthly, but only 11 months are active. With the default setting of Prorate By Day, the monthly charge is \$1098.08. If you choose Prorate By Month instead, the charge for each month is rounded to \$1,000.
- g. Complete any additional optional fields.
- h. Click **Save**.

For more information on pricing, see [Creating Price Plans](#).

6. Repeat these steps for each additional add-on item.
7. When you finish adding items, click **Save**.

## Charges Based on a Fixed Amount

If you negotiate on the total amount over the subscription term, you can enter a total amount for a subscription line and a charge frequency to calculate recurring amounts, instead of creating a price plan and quantity for customers that A total amount for a subscription line can now be entered instead of a price plan

You set a total value for a subscription line in the **Total Interval Value** field. NetSuite generates the corresponding price plan when you save the subscription.

The screenshot shows the NetSuite Subscription creation interface. At the top, there are buttons for Save, Cancel, List, Search, Customize, and More. The interface is divided into several sections:

- Primary Information:** Contains fields for Subscription ID (To Be Generated), Subcription Name (To Be Generated), Customer (2 Continuum Software), Billing Account (2: 13 13), Subsidiary (Parent Company), and Originating Sales Order.
- Plan and Term:** Contains fields for Subscription Plan (SMB Konverge Management & Storage), Start Date (1/1/2021), End Date (12/31/2021), Next Renewal Start Date, Class (Licensing), Location (Main), Price Book (SMB USD Annual), and Initial Term (1 Year Term).
- Billing Account:** Contains fields for Billing Schedule (Monthly The First Day of the Month), Start Date (1/1/2021), Last Bill Cycle Date (1/1/2021), Next Bill Cycle Date (2/1/2021), Last Bill Date (11/20/2020), and Location (Main).
- Pricing:** This tab is currently selected. It shows a table with one row for a Set-up Fee. The columns include Line Number, Item, Line Type, Start Date, Interval Status, Catalog Type, Included Quantity Multiplier, Quantity, Price, Edit, Discount, Total Interval Value, Recurring Amount, Charge Frequency, Repeat Every, and Prorate By. The Total Interval Value is set to 1000.00, and the Recurring Amount is One Time.

The Total Interval Value takes into consideration the following parameters when calculating a price plan value:

- repeat every
- charge frequency
- prorate start
- prorate end
- discount
- subscription term

When the total interval value is populated, it clears the values in the price plan. Re-entering a value for the price plan clears the total interval value. Either the total interval value or the price plan can be set for a given subscription line.

You can enter a total interval value only when a subscription line is in Draft status. You can't use total interval values on usage items or evergreen terms. When a total interval value is entered, generated price plans are always single-tiered price plans.

## Modifying the Class, Department, or Location of a Subscription Line

To modify the Class, Department, or Location field of a subscription line, the line must be in the Draft status. If the subscription line has any change orders, void them. Manually change the subscription line status to Draft, and then change the Class, Department, or Location field.

To change a subscription line back to Draft status when a sales order is attached to the subscription, you should change the sales order from the Approved status to Draft status. If you are changing only one line, you do not have to void all change orders; you need to move only the line back to Draft status.

## Changing a Subscription Line's Status on a Subscription Record

When a subscription record is in **Edit** mode, you can change the subscription line status from **Draft** to **Pending Activation** or from **Pending Activation** to **Draft**. You can use Sales Orders to move subscription lines to **Pending Activation** to remove them from your subscription creation flow, reducing the number of records you must interact with.

## Removing an Add-On Item

After an add-on item is added to a subscription, you cannot delete it. Like other line items, the add-on item is part of the subscription. If you need to omit the add-on item from the subscription, change the add-on item's status to **Not Included**.

### To remove an add-on item from a subscription:

1. Go to Transactions > Subscriptions > Create Subscriptions > List.
2. For the subscription you want to edit, click the subscription name or **Edit**.

3. For the add-on item you want to remove, clear the box in the **Include** column.
4. Click **Save**.

## Activating a Subscription

To activate a subscription, you must first activate all its subscription line items. After all subscription line items are activated, the **Activate** button appears. After you activate each line item, an activation change order activates the subscription. For more information on change orders, see [SuiteBilling Change Orders](#).

Change orders are date-sensitive.

- NetSuite uses the effective date to create future charges.
- You can choose to have the subscription start date set when the first activation change order is created. For details, see [Optional Preferences for SuiteBilling](#).

You can create saved searches to make it easy to find subscriptions. You also can search for subscriptions by name or ID with Global Search.

### To activate a subscription:

1. Go to Transactions > Subscriptions > Create Subscriptions > List.
2. For the subscription you want to activate, click the subscription name to open the subscription in edit mode or click **Edit**.
3. On the **Lines** subtab, click **Edit** next to the line items you want to activate.
4. Change the **Status** field from **Draft** to **Pending Activation**.
5. Click **Save**.
6. Repeat these steps for each line item.
7. At the top of the page, click **Activate**.
8. On the Subscription Change Order – Activate page, check the **Apply** box for the items you want to activate. The status of every line item must be **Pending Activation**.
9. Click **Save**.

Subscription Change Order - Activate											<a href="#">List</a>	<a href="#">Search</a>	
Primary Information													
NUMBER	CO_1048	REQUESTER	Mark Wheel										
EFFECTIVE DATE	2/23/2017	MEMO											
<input checked="" type="checkbox"/> REQUEST OFF-CYCLE INVOICE FOR ADVANCE CHARGES													
Lines	Subscription	System Notes											
INCLUDE	LINE NUMBER	STATUS	NEW STATUS	ITEM	PRICE PLAN	QUANTITY	DISCOUNT	START DATE	END DATE				
Yes	1	Pending Activation	Active	Item_S2_R01_1485798867418	Above 0:	\$100.00	1	2/23/2017	2/23/2017				
Yes	2	Pending Activation	Active	Item_S2_R01_1485799022061	Above 0:	\$150.00	1	2/23/2017	2/23/2017				
	3	Pending Activation		Item_S2_R01_1485798996883	Above 0:	\$300.00	1	2/23/2017	2/23/2017				

## Creating Usage Records

**Usage** defines the charge for a subscription line item that can be consumed, such as money, time, software licenses, or internet data. Some subscription line items include an amount of usage. For example, if you sell mobile phone service plans, your subscription may have a line item for a monthly

fee. The monthly fee includes a specific amount of minutes or data in your customer's plan. When this included amount is exceeded, additional charges may apply. In NetSuite, you account for the usage amount included in a subscription when creating the subscription plan.

You also can multiply the amount of usage included in a subscription. For example, there are a total of five people in one household that are part of a cell phone plan. When you create the price book, you can multiply the included usage for the data item by five. This gives each person the same amount of included usage. For instructions, see [Creating Price Books](#).

One-time and recurring charges often bill in advance, whereas usage charges bill in arrears. Usage cannot be billed until the item has been used.

The Billing Specialist role without the accounting list permission can create usage with a usage record.

You cannot delete a usage charge after a rating run but you can void it. For more information, see [Voiding a Usage Record](#).

### To create a usage record:

1. Go to Transactions > Subscriptions > Create Usage.

2. (Optional) From the **Customer** list, select a customer.
3. (Optional) From the **Item** list, select the item for which you want to associate usage.
4. (Optional) From the **Subscription Plan** list, select the subscription plan to which you want to add usage.
5. From the **Subscription** list, select a subscription.
6. From the **Subscription Line** list, select a subscription line item.
7. In the **Quantity** field, enter the quantity.
8. In the **Usage Date** field, enter or select a date.
9. Click **Save**.



**Note:** The usage record does not support user event scripts.

## Voiding a Usage Record

You can void any usage record in the Active or Suspended state. You can void a usage record at any time, even when it has already been rated or invoiced. If a usage record has been invoiced or revenue has been recognized, voiding it generates any required reversing charges or revenue. Voiding usage records eliminates the need for manually entering credits and corrections for erroneously rated usage.

You cannot delete a voided usage record. When a usage record is voided, it permanently becomes a view-only record.

If a usage is voided and another usage is created before rating or revenue updates, NetSuite uses the net quantity change to generate the charge amount.

You can create a termination change order even if a usage record exists after the termination effective date. NetSuite automatically voids usage records created after a termination change order.

### To void a usage record:

1. Go to Transactions > Subscriptions > Create Usage > List.
2. Click the number of the usage line you wish to void.

**Important:** The subscription line for the usage record must be in the Active or Suspended state. If the subscription line status is Terminated, Closed, Pending Activation or Draft, you cannot void the usage record.

3. On the Usage record, click **Void**.

The screenshot shows the 'Usage' transaction screen. At the top, there are buttons for 'Save', 'Cancel', and 'Void'. The 'Void' button is highlighted with a red box. Below the buttons is a section titled 'Primary Information' with a memo field and various input fields for Customer, Item, Subscription Plan, and Subscription. In the bottom right corner of this section, there is a note: 'SUBSCRIPTION LINE Records Management Plus - 8/1/2020: 3 QUANTITY 1 USAGE DATE 8/1/2020 USAGE STATUS Active'. Below this is a 'Charges' section with a 'VIEW' dropdown set to 'Usage Charges' and a 'Customize View' button. A table below shows columns for #, CHARGE ID, ITEM, CHARGE TYPE, SERVICE START DATE, SERVICE END DATE, DATE, AMOUNT, and CURRENCY. The message 'No records to show.' is displayed.

4. Click **Save**.

## Managing Rating Runs

**Rating** is the process of creating charges for subscription line items. NetSuite calculates charges for a subscription using the information on its line items, such as:

- The quantities, pricing, and usage shown in the price plan and price book
- The effective date of the subscription
- The status of the subscription and its line items

You use a change order to set and change the status of subscription line items.

Certain tasks you perform on a subscription line item that affect NetSuite charge calculations (for example, renewing a line item) are called **ratable events**. Examples of actions that cause ratable events include:

- Activating a line item
- Reactivating a line item
- Renewing a line item
- Suspending a line item
- Terminating a line item
- Modifying quantities and rates on a line item
- Saving a change order

## Automatic Rating Runs

When you save an action that causes a ratable event, NetSuite automatically starts calculating the charges specified in the subscription. This charge calculation process is called a **rating run**. You also can generate charges on demand, or you can schedule them with the current billing operations. You can run rating from the Billing Operation page.

When you save any change order, a ratable event occurs, which starts a rating run. Only one change order of a specific type can occur per day on a subscription line item. For example, you modify the price of a line item using a modify pricing change order, then realize you also need to add a discount. You must wait 24 hours to create another modify pricing change order for the same line.

The same is true for quantity changes. If you submit a change order that changes the quantity of a line item, you must wait at least 24 hours before submitting another.

Also, when you make changes to a draft subscription that alter pricing, an automatic rating run starts. This rating run does not generate charges but can determine things like the total subscription amount when synchronizing a draft subscription to a sales order. It is important to notice that the rating run is an asynchronous server process, so the most up-to-date result may not be available the instant the draft subscription is saved. To get the most up-to-date data, you can resynchronize the sales order.

**Use Case Example:** Consider a subscription line item, cell phone service, that starts on January 1, 2029 and ends on December 31, 2029.

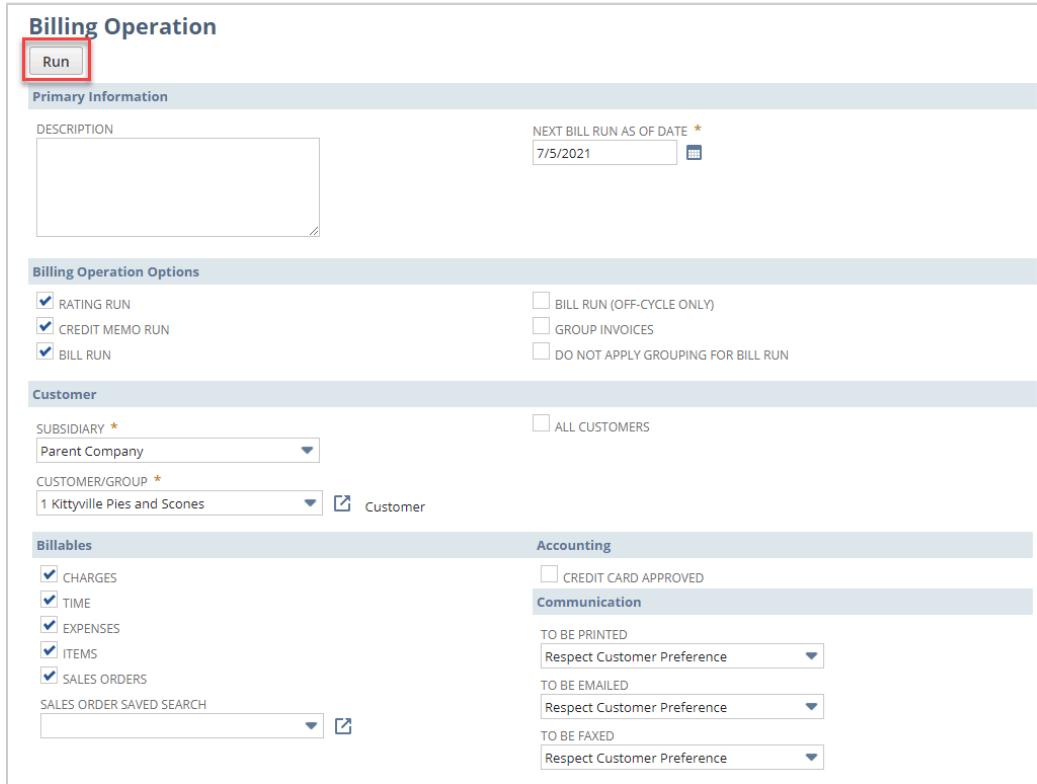
1. You create a change order that changes the subscription start date to February 1, 2029. When you save the activation change order record, rating occurs, and NetSuite creates charges for February, March, and so on to the end of the subscription term, reflecting the date change.
2. On May 1, you create a change order to suspend the cell phone service subscription line item. When you save the change order, rating occurs. NetSuite starts a rating run that calculates the charges from May 1 to the end of the subscription term, and places the charges **On Hold**. If earlier charges have been invoiced, negative charges could occur.

## Manually Creating Subscription Charges with Billing Operations

You can manually start a rating run to create charges at any time. You might manually use billing operations because of a price change related to a subscription. Another example is a customer who decides to cancel their subscription early, and they are entitled to a partial refund. In this example, billing operations is used to create a credit memo. A subscription change order causes the need to manually create charges related to SuiteBilling. For more information on Billing Operations, see the help topic [Billing Operations](#).

## To manually calculate subscription charges with Billing Operations:

1. Go to Transactions > Billing > Process Billing Operations.
2. On the Billing Operation page, check the **Rating Run** box, then click **Run**.



The screenshot shows the 'Billing Operation' page with the following sections:

- Primary Information:** Contains fields for 'DESCRIPTION' (empty) and 'NEXT BILL RUN AS OF DATE \*' (set to 7/5/2021).
- Billing Operation Options:** Includes checkboxes for 'RATING RUN' (checked), 'CREDIT MEMO RUN' (checked), and 'BILL RUN' (checked). It also has three unchecked options: 'BILL RUN (OFF-CYCLE ONLY)', 'GROUP INVOICES', and 'DO NOT APPLY GROUPING FOR BILL RUN'.
- Customer:** Subsidiary dropdown set to 'Parent Company'. Customer dropdown set to '1 Kittyville Pies and Scones'.
- Billables:** A list of checked transaction types: CHARGES, TIME, EXPENSES, ITEMS, and SALES ORDERS.
- Accounting:** A checkbox for 'CREDIT CARD APPROVED' which is unchecked.
- Communication:** Sections for 'TO BE PRINTED' (dropdown set to 'Respect Customer Preference'), 'TO BE EMAILED' (dropdown set to 'Respect Customer Preference'), and 'TO BE FAXED' (dropdown set to 'Respect Customer Preference').

## Creating Scheduled Subscription Charges Using Billing Operations

You can schedule a rating run to create subscription charges for a specific day and time, such as the charges for a subscription that is billed monthly. For more information on Billing Operations, see, [Billing Operations](#).

## To create scheduled subscription charges using Billing Operations:

1. Go to Transactions > Billing > Schedule Billing Operations.
2. Under Primary Information, enter a name and description for the bill run schedule. If you do not want to make the bill run schedule active right away, check the **Inactive** box.
3. Under Schedule, setup a schedule for the bill run.
4. Under Billing Operation Options, check the **Bill Run** box.
5. Under Billables, select the types of transactions for which you want to create bills.
6. Under Accounting, indicate whether the credit card is approved.
7. Under Communication, indicate whether bills should be printed, emailed, or faxed.
8. Click **Save**.

## Applying Discounts to Subscriptions

You can apply discounts at both the subscription plan and the subscription line item levels. You can apply discounts to one-time, usage, and recurring subscription line items. Discounts apply to all line types and all pricing options.

You can apply a discount to a subscription only when it is in the **Draft** state. After a subscription is activated, you cannot apply a discount. To apply a discount to a draft subscription, edit the discount field in-line. After a subscription is in the **Active** state, you can apply discounts only using a Modify Pricing Change Order.

Charges and invoices dynamically display the net charge amount after discount. Therefore, there are no associated discount line items on an invoice.

### To apply a discount to a subscription:

1. Go to Transactions > Subscriptions > Create Subscriptions > List.
2. For the draft subscription to which you want to add a discount, click the subscription name or **View**.
3. On the subscription record, click **Edit**.
4. For the subscription line item to which you want to add a discount, enter the discount:
  - You can enter a discount between 0 and 100.
  - To enter a percentage discount, include the percent sign (%), for example, 50%.
  - To enter a flat rate discount, do not include any notation, for example, 50.
  - Negative discounts and discounts above 100% are not permitted.
5. To add discount to an active subscription, see [Modifying Pricing](#).

## SuiteBilling Subscription Revisions

When you create, edit, or void a subscription change order, NetSuite generates a subscription revision with the individual contract modifications and the associated revenue impacts. When you save a subscription change order, all changes associated with it are stored in the subscription revision.

A subscription revision saves the history of changes made to the subscription. You can track contract and revenue changes that are made after activation to a specific change order. You also can track changed values over an entire contract term. For more information about subscription changes orders, see [SuiteBilling Change Orders](#).

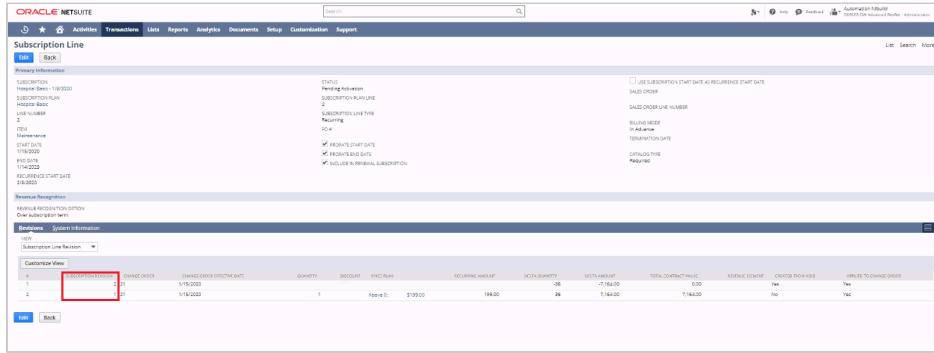
You can no longer delete a subscription change order, but you can void it. Voided change orders are visible but do not impact charge amounts, so you can track the revenue change history after change orders have been removed. For instructions, see [Voiding a Change Order](#).

## Viewing Subscription Revisions

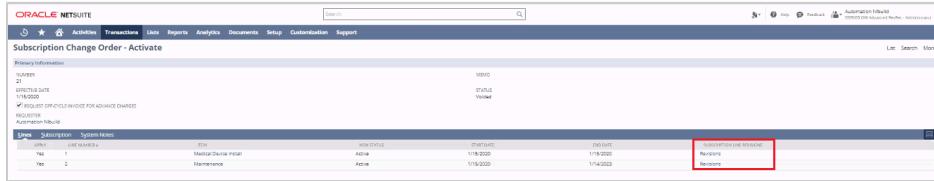
You can see subscription revisions on the Subscription Line record or the Subscription Change Order record.

## To view a subscription revision:

- View a subscription revision in the following records:
  - The Subscription Line record, on the **Revisions** subtab, in the Subscription Revision column, as shown in the following figure:



- The Subscription Change Order record, on the **Lines** subtab, in the Subscription Line Revisions column, as shown in the following figure:



If you edit or delete a subscription that was activated before 20.1, NetSuite does not create subscription revisions. NetSuite creates new subscription revisions for a subscription that was activated before 20.1 only when you next save a subscription change order.

Subscription revisions contain the following data:

- Change Order Effective Date**
- Discount**
- Price Plan**
- Revenue Element** — For a Usage line, the subscription revision includes a link to its Revenue Element that resulted from a specific modification. For One-Time and Recurring lines, the subscription revision includes links to its Revenue Elements that resulted from specific modifications.
- Created From Void** — Subscription changes resulting from a voided change order.
- Applied to Change Order** — Indicates any line removed from a change order by clearing the **Apply** checkbox.
- Created By**
- End Date** — the line end date at the time the change order and revision are created.

Subscription revisions contain the following additional data for One-Time and Recurring line types:

- Quantity**
- Recurring Amount**
- Delta Quantity** — Delta values represent the total change from the subscription change order effective date to the subscription line end date. If the subscription term is Evergreen, the delta value is the Estimated Rev Rec End Date, or if Advance Revenue Recognition is not enabled, 3 years.

- **Delta Amount**
- **Total Contract Value** – The Total Contract Value is based on the entire contract term for the subscription line.

## Clearing Revisions

You can clear revisions only when no revenue has been recognized or merged. Clear Revisions does the following:

- Clears the change order history from the **Change Order** subtab
- Removes all history of revisions
- Removes all revenue arrangements and elements associated with the subscription

### To clear all of a subscription's revisions:

1. For the subscription you want to clear, click the subscription name or **Edit**.



**Tip:** To find the subscription, you can:

- Look in the **Recent Records** tab for recently viewed subscriptions.
- Enter the subscription name or subscription ID into the Global Search field.

2. From the Actions list, select Clear Revisions.

## Voiding a Change Order

As of NetSuite 2020.1, it is no longer possible to delete a subscription change order record. Instead, you can void subscription change orders.

You cannot edit a voided change order.

### To void a change order:

1. (Optional) If the subscription change order has revisions, you must clear the revisions before you can void the change order. See [Clearing Revisions](#).
2. If you have not already opened the change order record, open it. For information about change order types, see [SuiteBilling Change Orders](#). For the navigation path of a change order, refer to the procedure for the type of change order you want to locate. For example, for an activation change order, see the help topic [Activating a Subscription](#).
3. On the change order record, click **Void**.

Using SuiteScript, you can search for and view voided change orders and void a subscription change order. When the SuiteScript 1.0 nlapiDeleteRecord method or the SuiteScript 2.0 record.delete method run against a subscription change order, these methods void the record instead of deleting it. If you are using a subscription change order search in SuiteScript, use the new Status field to filter for active change orders to exclude voided change orders.

## Viewing a Voided Change Order

Voided records are included in subscription change order searches so that you can track revenue and contract changes.

### To view a voided change order:

1. Click a change order with the Voided status.
2. To see details, click the column heading.

## Change Order Type-Specific Revenue Impacts

The following are type-specific changes to subscription change orders:

- Activation and Reactivation change orders start revenue generation, and are considered the base element for reporting structures. Each line in the change order generates a revenue element starting on the change order effective date and ending on the subscription end date.
- In a Modify Pricing change order, a single line change could create multiple revenue elements for a single revision. This can occur when the line goes through future change orders such as quantity or price modifications. The start and end dates depend on the number of future dated change orders.
- Suspend and Termination change orders reverse all revenue beyond the effective date. Each modify, extend, and activation change order generates a revenue element.
- Renew-Extend change orders generate a revenue element for every active subscription line at the start date of the extension. The date of entry is the effective date of Renew-Extend change orders.

## Terminating a Subscription Line Item

Terminating a subscription is a line-level action. When you terminate a subscription line item, you can edit it on or before the termination date. After a subscription line is closed or terminated, the subscription line is locked from all edits. If you want to terminate a subscription using the Terminate change order, you must first terminate each subscription line item.

After a line item is terminated, the status of the line item changes to **Terminated** the day after the termination date. For example, if you terminate a subscription at 8:00 a.m. on July 1, the termination change order does not take effect until 11:59 p.m. If there is a daily charge or prorated charge for the subscription, the customer will be charged for July 1. Any future charges are canceled. If a subscription line item is terminated in error, you must enter a new subscription item. You cannot change the subscription line item status after it is set to **Terminated**.

### To terminate a subscription line item:

1. Go to Transactions > Subscriptions > Create Subscriptions > List.
2. Click the **Edit** link associated with the subscription for which you want to terminate line items.
3. From the **Actions** menu, select **Terminate**.
4. In the **Effective Date** field, enter or select a date for the termination.
5. For the line item you want to terminate, check the **Apply** box.
6. Click **Save**.

## Suspending a Subscription Line Item

Suspend subscription line items using the suspend change order. You can suspend subscription line items when a customer wants to temporarily stop receiving those items. If you need to suspend a subscription item, you must first activate it. For instructions about how to activate a subscription line item, see [Activating a Subscription](#).

To suspend a subscription line item, it must be in either **Active** or **Pending Activation**.

### To suspend a subscription line item:

1. On the subscription record, from the **Actions** menu, select **Suspend**.
2. In the **Effective Date** field, enter or select a date for the suspension.
3. In the **Requester** field, if necessary, change the requester.
4. In the **Modification Type** field, choose one of the following options:
  - **New or Churn** - The analytics revenue impact of the change order is classified as New or Churn.
  - **Upsell or Downsell** - The analytics revenue impact of the change order is classified as Upsell or Downsell.
  - **Ignored** - The change order has no analytics revenue impact.
5. Check the **Apply** box associated with the item you want to suspend. The **Apply** box for items that cannot be suspended is inactive.
6. Click **Save**.

After an item is suspended, you must use the reactivate change order to reactivate the item.

## Reactivating a Subscription Line Item

Reactivate suspended line items using the reactivate change order.

After an item is suspended, a customer may want to again receive the item that was suspended. To reactivate an item, it must have the **Suspended** status.

### To reactivate a subscription line item:

1. On the subscription record, from the **Actions** menu, select **Reactivate**.
2. In the **Effective Date** field, enter or select a date for the reactivation.
3. In the **Requester** field, if necessary, change the requester.
4. In the **Modification Type** field, choose one of the following options:
  - **New or Churn** - The analytics revenue impact of the change order is classified as New or Churn.
  - **Upsell or Downsell** - The analytics revenue impact of the change order is classified as Upsell or Downsell.
  - **Ignored** - The change order has no analytics revenue impact.
5. Check the **Apply** box associated with the line item you want to reactivate.
6. Click **Save**.

After submitting a reactivate change order, the subscription item reactivates on the effective date.

To revert a subscription line to Pending Activation status, you must void all its change orders. For instructions, see [Voiding a Change Order](#).

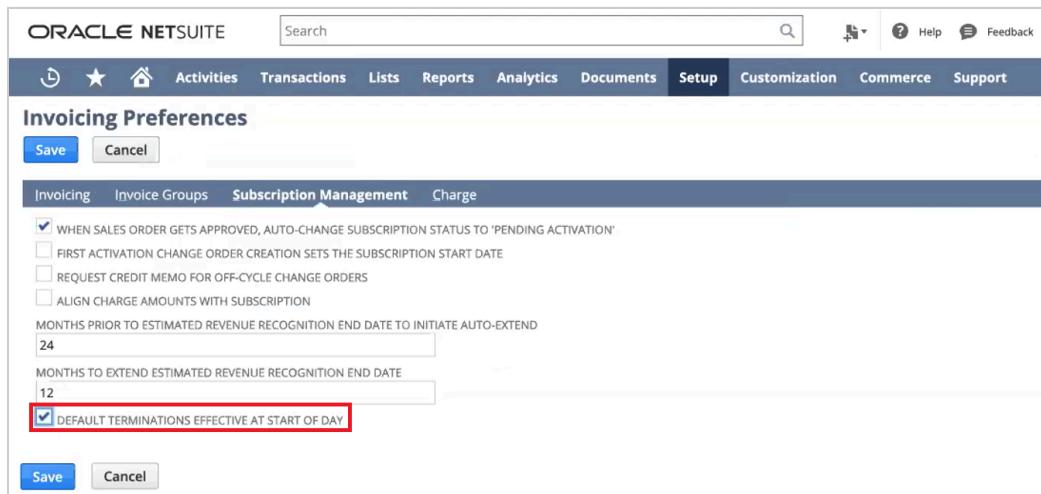
## Removing One-Day Charges

To remove a one-day charge caused by terminating a subscription line, you can create terminate change orders at the beginning of the day. Termination change orders can take effect at the start of day or end of day. Termination change orders can cancel Activation change orders.

To remove one-day charges for a single suspended day caused when you reactivate a subscription line, you can create a reactivation change orders on the item's suspension date. To reactivate all charges, you can create Reactivation change orders to take effect on the same day as Suspend change orders.

### To remove a one-day charge from a subscription line item:

1. Go to Setup > Accounting > Invoicing Preferences.
2. On the Subscription Management tab, click **Default Terminations Effective at Start of Day**.



3. Click **Save**.

The **Default Terminations Effective at Start of Day** preference determines the default behavior for when termination change orders will take effect, at the start or end of day. You can enable and disable this preference at any time. The setting at a given point in time determines the behavior of any termination change order created.

Removing one-day charges is useful when you create an Activation change order then realize you activated the subscription in error. You need to remove all of the charges from that subscription line. When you create a Termination change order with **Default Terminations Effective at Start of Day** set, and on the same date as the Activation change order, all charges for that subscription line are removed. For example, if you create a Termination change order for January 1 and **Default Terminations Effective at Start of Day** is checked, there is no charge for January 1. Termination change orders that are created on the same day as the activation change order, and are set to take place at start of day, cancel out the activation and remove all charges for the line. There is no single-day charge.

Likewise, you can create a Reactivation change order on the same day as a Suspend change order. Prior to NetSuite version 21.1, Reactivation change orders were not permitted to be created on the same day as a Suspend change order. A Suspend change order resulted in a single-day charge left in the On Hold status and unable to be billed. For example, you have a subscription that was created with two

lines. In Related records, you can see that invoices were sent January and February. One of the lines was suspended on 3/1/2021, so all charges from that date forward are on hold.

#	SUBSCRIPTION LINE	ITEM	CHARGE TYPE	SERVICE START DATE	SERVICE END DATE	BILL DATE	AMOUNT	CURRENCY	CHARGE STAGE
1	Mid Market Data Storage - 1/1/2021:1	Set-up Fee	One-Time	1/1/2021	1/1/2021	1/1/2021	\$2,000.00	USA	Processed
2	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	1/1/2021	1/31/2021	1/1/2021	\$500.00	USA	Processed
3	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	2/1/2021	2/28/2021	2/1/2021	\$500.00	USA	Processed
4	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	3/1/2021	3/31/2021	3/1/2021	\$500.00	USA	Hold
5	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	4/1/2021	4/30/2021	4/1/2021	\$500.00	USA	Hold
6	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	5/1/2021	5/31/2021	5/1/2021	\$500.00	USA	Hold
7	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	6/1/2021	6/30/2021	6/1/2021	\$500.00	USA	Hold
8	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	7/1/2021	7/31/2021	7/1/2021	\$500.00	USA	Hold
9	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	8/1/2021	8/31/2021	8/1/2021	\$500.00	USA	Hold
10	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	9/1/2021	9/30/2021	9/1/2021	\$500.00	USA	Hold
11	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	10/1/2021	10/31/2021	10/1/2021	\$500.00	USA	Hold
12	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	11/1/2021	11/30/2021	11/1/2021	\$500.00	USA	Hold
13	Mid Market Data Storage - 1/1/2021:2	Data Storage	Recurring Service	12/1/2021	12/31/2021	12/1/2021	\$500.00	USA	Hold

Creating a Reactivation change order to take effect on the same day as a Suspend change order results in the full charge amount returning to the Ready state.

### To remove a one-day charge for a single suspended day caused when you reactivate a subscription line:

- From the **Actions** menu, select **Reactivate**.
- On the Reactivate change order, set the **Effective Date** to 3/1/2021.
- For the line item you want to suspend, check the **Apply** box.
- Click **Save**.

APPLY	LINE NUMBER	ITEM	STATUS	NEW STATUS	QUANTITY	PRICE PLAN	DISCOUNT	RECURRING AMOUNT	START DATE	END DATE
<input type="checkbox"/>	1	Set-up Fee	Closed	<input type="button" value="Closed"/>	1	Above 0: \$2,000.00			1/1/2021	1/1/2021
<input checked="" type="checkbox"/>	2	Data Storage	Suspended	<input type="button" value="Active"/>	10	Above 0: \$50.00		500.00	1/1/2021	12/31/2021

When you go back to Related Records tab, all charges are back in the Ready status, as shown in the following image.

#	SUBSCRIPTION LINE	ITEM	CHARGE TYPE	SERVICE START DATE	SERVICE END DATE	BILL DATE	AMOUNT	CURRENCY	CHARGE STAGE
1	Mid Market Data Storage - 1/1/2021: 1	Set-up Fee	One-Time	1/1/2021	1/1/2021	1/1/2021	\$2,000.00	USA	Processed
2	Mid Market Data Storage - 1/1/2021: 2	Data Storage	Recurring Service	1/1/2021	1/31/2021	1/1/2021	\$500.00	USA	Processed
3	Mid Market Data Storage - 1/1/2021: 2	Data Storage	Recurring Service	2/1/2021	2/28/2021	2/1/2021	\$500.00	USA	Processed
4	Mid Market Data Storage - 1/1/2021: 2	Data Storage	Recurring Service	3/1/2021	3/31/2021	3/1/2021	\$500.00	USA	Ready
5	Mid Market Data Storage - 1/1/2021: 2	Data Storage	Recurring Service	4/1/2021	4/30/2021	4/1/2021	\$500.00	USA	Ready
6	Mid Market Data Storage - 1/1/2021: 2	Data Storage	Recurring Service	5/1/2021	5/31/2021	5/1/2021	\$500.00	USA	Ready
7	Mid Market Data Storage - 1/1/2021: 2	Data Storage	Recurring Service	6/1/2021	6/30/2021	6/1/2021	\$500.00	USA	Ready

This completely cancels out the suspension, allowing for the full charge amount to be billed. Suspend and reactivation change orders are still restricted to one change order of the same type per day for a subscription line. Therefore, you can't create a second suspend or reactivate change order for the same day.

## Modifying Pricing

Modify pricing using the modify pricing change order. Modify pricing change orders change the existing price for one or more active subscription items based on a quantity, rate, or discount change. For more information on change orders, see [SuiteBilling Change Orders](#).

You may need to modify the rate, quantity, or discount of an item during the subscription term. For example, a client calls three months into the subscription term and asks to add additional licenses because they have hired new employees. Or, the client needs to increase the discount during the term because one of their customers is unhappy.

### To modify pricing:

1. Go to Transactions > Subscriptions > Create Subscriptions > List.
2. For the subscription for which you want to modify pricing, click **View**.
3. Click **Modify Pricing**.
4. (Optional) If you want to use off-cycle pricing, check the **Use Off-Cycle Invoice for Advance Charges** box. For information about off-cycle invoicing, see [Off-Cycle Invoicing with Modify Pricing Change Orders](#).
5. In the **Effective Date** field, enter or select a date.
6. In the **Requester** field, if necessary, change the requester.
7. In the **Modification Type** field, choose one of the following options:
  - **New or Churn** - The analytics revenue impact of the change order is classified as New or Churn.
  - **Upsell or Downsell** - The analytics revenue impact of the change order is classified as Upsell or Downsell.
  - **Ignored** - The change order has no analytics revenue impact.
8. Click the item for which you want to modify pricing.
9. Click **Edit**.
10. On the **Sales/Pricing** subtab, change the pricing information.

11. Click **Save**.

After modifying pricing, you can return to the subscription by going to Transactions > Subscriptions > Create Subscriptions > List.

## Off-Cycle Invoicing with Modify Pricing Change Orders

The off-cycle modify pricing change order prorates pricing charges mid-cycle. An off-cycle pricing change order generates positive and negative charges. You need to process billing operations to generate the associated invoice and credit memo. You can then choose to manually apply the credit memo or apply it to a future date. For information on billing operations, see the help topic [Billing Operations](#).

## Closed Subscriptions

When the subscription term ends and the subscription is not automatically set to renew, the subscription closes. When a subscription closes, you can no longer create change orders for that subscription.

If a customer wants to renew a closed subscription, you can renew it by creating a new subscription, or by renewing and extending the existing subscription before it closes. For information on renewal options, see [Renewing a Subscription](#).

## Renewing a Subscription

There are different ways to specify whether and how to renew a subscription. You can do any of the following:

- Renew (or extend) an existing subscription. To view the process diagram, see [Renew and Extend a Subscription from a New Subscription Record](#).
- Renew by creating a new subscription transaction that uses the existing plan or a new plan. To view the process diagram, see [Renew a Subscription with a New Subscription Record](#).

You can manually create a renew change order during the subscription term.

You can automatically initiate the renewal process on the Subscription record. Under the **Renewal** subtab, you can view renewal options, including the term, method, and transaction type. From this same location, you can automatically initiate the renewal process before the subscription end date.

EDIT	VIEW	NAME	SALES ORDER	INITIAL TERM	START DATE	END DATE	STATUS	RENEWAL TRANSACTION
Edit	View	All Optional - 3/1/2017		One Year	3/1/2017	2/28/2018	Not Included	

For the Default Renewal Transaction Type field, you can choose Do Not Create Sales Transaction. If you choose this option, upon renewal, NetSuite creates a new subscription using the existing subscription plan. NetSuite does not associate the new subscription with a sales transaction.

If you want to renew a subscription before the subscription end date, you can extend the end date of the existing subscription. However, if the renewal requires a new subscription transaction, the subscription cannot be renewed using the extend existing subscription method.

A subscription that renews to a new Subscription record can have a different billing account from the original subscription. During subscription renewal, the newly created subscription has the billing account from the original subscription. However, you can change the billing account after you create the subscription while it is in the Draft or Pending Activation status.

Subscription renewals are considered either low-touch or high-touch:

- A low-touch renewal is one that automatically renews, or extends, when the initial subscription ends.
- A high-touch renewal requires more effort. Someone, for example, a sales representative, needs to contact the customer or manually renew the subscription.

#### Example 1: Low Touch Renewal at the End of the Term



In this example, the figure represents an existing magazine subscription that runs from January 1, 2021 to December 31, 2021. On January 1, 2022, the subscription automatically renews for another year using the extend existing subscription method with the same subscription plan and existing pricing.

#### Example 2: High Touch Renewal Before the End of the Term



In this example, an existing one-year subscription expires on December 31, 2021, but is not set to automatically renew. A sales person needs to contact the customer to negotiate another subscription. A new subscription is created using the create new subscription renewal method. The new subscription could have required changes to the subscription plan or a change in price, and is created with a **Draft** status. The associated sales order is created with **Pending Approval** status.

#### To renew a subscription automatically:

1. Go to Transactions > Subscriptions > Create Subscriptions > List.
2. For the subscription you want to renew, click **Edit**.
3. Click the **Renewal** subtab.
4. From the **Default Renewal Term** list, select a term for the renewal subscription.
5. From the **Default Renewal Method** list, select a default renewal method.
  - a. If you selected **Extend Existing Subscription**, go to step 6.
  - b. If you selected **Create New Subscription**:
    - i. From the **Default Renewal Subscription Plan** list, select a default subscription plan for the renewal subscription.

- ii. From the **Default Renewal Price Book** list, select a pricing option for the renewal subscription.
  - iii. From the **Default Renewal Transaction Type** list, select one of the available options (**Do Not Create Sales Transaction Estimate, Opportunity, or Sales Order**).
  6. To automatically start the renewal process, check the **Automatically Initiate Renewal Process** box and enter the appropriate number into the **Before Subscription End Date** box.
- Note:** The appropriate number to enter depends on your organization. It indicates how many days before the subscription ends that you want to contact the customer. For example, you might want to contact the customer to renegotiate the subscription terms.
7. Click **Save**.

### To renew a subscription manually:

1. Go to Transactions > Subscriptions > Create Subscriptions > List.
2. For the subscription you want to renew, click **Edit**.
3. From the Actions menu, click **Renew**.
4. From the **Default Renewal Term** list, select a term for the renewal subscription.
5. From the **Default Renewal Method** list, select a default renewal method.
  - a. If you selected **Extend Existing Subscription**, go to step 6.
  - b. If you selected **Create New Subscription**:
    - i. From the **Default Renewal Subscription Plan** list, select a default subscription plan for the renewal subscription.
    - ii. From the **Default Renewal Price Book** list, select a pricing option for the renewal subscription.
    - iii. From the **Default Renewal Transaction Type** list, select one of the available options (**Do Not Create Sales Transaction Estimate, Opportunity, or Sales Order**).
6. Click **Save**.

## Including Add-On Items in Subscription Renewals

When renewing a subscription manually using a renewal change order, you have the option to edit each line item before saving the draft subscription. Reasons you might want to edit lines include adding or removing items from the subscription. Perhaps a service is no longer available or has been replaced by a new service.

The following default rules apply to add-on items with the **Include In Renewal Subscription** box checked:

For these default renewal settings:	These rules apply:
Method – Extend Existing Subscription	All add-on items are included at the same price and quantity for the extended renewal period.
Method – Create New Subscription Subscription Plan – Same Subscription Plan	All add-on items are included in the draft renewal subscription with the same price and quantity.
Price Book – Keep Existing Pricing	

For these default renewal settings:	These rules apply:
Method – Create New Subscription Subscription Plan – Same Subscription Plan Price Book – a specific price book	All add-on items are included in the draft renewal subscription with the same quantity. Prices are defined by the specific price book.
Method – Create New Subscription Subscription Plan – (a different plan from the original subscription selected)	Add-on items from the original subscription are not included in the draft renewal subscription.  Only line items defined in the renewal plan are included on the renewal subscription.

## Adding Renewal Information to Subscription Plans

You can specify subscription renewal parameters when you create the subscription plan, or you can edit the plan later to add renewal information. The renewal options selected on the plan are used when creating all subscriptions from this plan. However, the plans can be edited when the draft subscription is created.

### To add renewal information to a subscription plan:

1. Go to Lists > Subscriptions > Subscription Plans.
2. For the subscription you want to renew, click **Edit**.
3. Click the **Renewal** subtab.
4. From the **Default Renewal Term** list, select a term for the renewal subscription.
5. From the **Default Renewal Method** list, select a default renewal method.
  - a. If you selected **Extend Existing Subscription**, go to step 6.
  - b. If you selected **Create New Subscription**:
    - i. From the **Default Renewal Subscription Plan** list, select a default subscription plan for the renewal subscription.
    - ii. From the **Default Renewal Transaction Type** list, select one of the available options (**Do Not Create Sales Transaction**, **Estimate**, **Opportunity**, or **Sales Order**).
6. To automatically start the renewal process, check the **Automatically Initiate Renewal Process** box and enter the appropriate number into the **Before Subscription End Date** box.
7. Click **Save**.

## Deleting a Subscription

Before you can delete a subscription, you must void all change order records and then remove them by clearing the subscription revisions.

### To delete a subscription:

1. Void all change order records. For instructions, see [Voiding a Change Order](#).
2. Use the Clear Revisions feature to remove subscription change orders. For instructions, see [Clearing Revisions](#).
3. For the subscription you want to delete, click the subscription name or **Edit**.



**Tip:** To find the subscription, you can:

- Look in the **Recent Records** tab for recently completed subscriptions.
- Enter the subscription name or subscription ID into the Global Search field.

4. From the Actions list, select **Delete**.

# SuiteBilling Reports

SuiteBilling offers several reports that let you monitor your subscriptions and customers:

- [Monthly Recurring Revenue Report](#)
- [Total Contract Value Report](#)
- [Billings To Date Report](#)
- [Churn By Customer Report](#)
- [Churn By Revenue Report](#)

To view the SuiteBilling reports, go to Reports > Subscriptions.

 **Tip:** If you don't see the Subscriptions option in the Reports menu, switch to an administrative role or contact your NetSuite administrator.

## Monthly Recurring Revenue Report

The Monthly Recurring Revenue report shows the sum of recurring line items for a specified month or range.

Each line of the The Monthly Recurring Revenue report includes the following columns:

- Customer
- Subscription Plan
- Subscription

The default date range is the previous rolling year.

### To view the Monthly Recurring Revenue report:

1. Go to Reports > Subscriptions > Montly Recurring Revenue.
2. If you want to customize this report, click [Report Customization](#).

The Monthly Recurring Revenue report shows the final rating value for a given month. This report does not include prorated amounts, even if proration is enabled for a line item.

Suspended subscriptions are reported the same as active subscriptions, but closed or terminated subscriptions are not reported. In addition, draft subscriptions are not currently reported.

The Monthly Recurring Revenue report assumes that subscriptions will be renewed. Any subscriptions that are not terminated or closed continue to report into the future.

For more information on reporting, see the help topic [Reporting Overview](#).

## Total Contract Value Report

The Total Contract Value report shows total bill charges for the full term of a subscription. To see charges up to the current time for a subscription, see the [Billings To Date Report](#).

The Total Contract Value report does not include usage charges because usage can vary each billing period.

Each line of the Total Contract Value report includes the following columns:

- Customer
- Subscription Plan
- Subscription

#### **To view the Total Contract Value report:**

1. Go to Reports > Subscriptions > Total Contract Value.
2. If you want to customize the TCV report, click [Report Customization](#).

The data is represented as the total sum of all charges for a given subscription. Credit memos are represented in the months in which they are created.

Future months beyond the current bill cycle show the total contract value based on any change orders or modifications to the subscription to date.

For more information on reporting, see the help topic [Reporting Overview](#).

## Billings To Date Report

The Billings to Date report shows total billed charges, up to the current cycle, for a subscription. To view charges for the full subscription term, see the [Total Contract Value Report](#).

Each line of the report includes the following columns:

- Customer
- Subscription Plan
- Subscription

#### **To view the Billings To Date report:**

1. Go to Reports > Subscriptions > Billings To Date.
2. If you want to customize the report, click [Report Customization](#).

The data is represented as a rolling transaction total from month to month. Credit memos are represented in the months in which they are created.

Future months beyond the current bill cycle show the total billings to date based on the last billing transaction for that subscription.

For more information on reporting, see the help topic [Reporting Overview](#).

## Churn By Customer Report

The Churn by Customer report shows how many customers are canceling or have subscriptions ending in a given month. Churn is calculated differently by different customers. As a result, the structure of the Churn by Customer report is different from most other NetSuite reports. It allows for the addition of fields.

#### **To view the Churn By Customer report:**

1. Go to Reports > Subscriptions > Churn by Customer.

- If you want to customize the report, click [Report Customization](#).

For more information on reporting, see the help topic [Reporting Overview](#).

The following table provides a list of columns and their definitions.

Column	Definition
Customers at beginning of month	The number of customers with active subscriptions at the beginning of the month.
Customers at end of month	The number of customers at the end of the month. This total is calculated by adding net new customers to the number of customers at the beginning of the month.
New Customers	Customers who activated their first new subscription at any point in the month.
Churned Customers	Customers whose subscriptions have all closed or terminated in the month.
Net New Customers	New customers minus churned customers. This can be a positive or negative number.
Customer Churn %	Churned customers divided by customers at the beginning of the month.

Notes about calculating churn and customers:

- Churn is included only in the month that the subscription ends.
- The default date selection is Last Rolling Year. This report only shows information for full months of data.
- Customers with a subscription in the first month of data collection are counted toward total customers.
- All customers in the first month of data collection are considered new customers.
- Customer churn % is calculated as: churned customers divided by new customers, then multiplied by 100 in the first month of data collection.
- Suspended subscriptions do not count toward churn.
- If the number of customers at the beginning of the month equal zero (0), the customer churn % cannot be calculated.

## Churn By Revenue Report

The Churn by Revenue report shows the reduction in monthly recurring revenue due to subscriptions being reduced in value, canceled, or ending.

### To view the Churn By Revenue report

- Go to Reports > Subscriptions > Churn by Revenue.
- If you want to customize the report, click [Report Customization](#).

For more information on reporting, see the help topic [Reporting Overview](#).

The following table provides a list of rows and their definitions.

Row	Definition
MRR at Beginning (of Month)	Monthly recurring revenue calculated on the last day of the previous month. This is the same amount reported for a prior month on the Monthly Recurring Revenue report.

Row	Definition
MRR at End (of Month)	Monthly recurring revenue calculated on the last day of a specific month. This is the same amount reported for a specific month in the Monthly Recurring Revenue Report.
New MRR	Monthly recurring revenue associated with new subscriptions started in a specific month. This is equal to the sum value of all subscriptions with a start date in a specific month.
Expansion MRR	Monthly recurring revenue associated with the upsell of existing subscriptions in a specific month. This is the sum value of all subscriptions that increased in value in a specific month.
Contraction MRR	Monthly recurring revenue associated with the downsell of existing subscriptions. This is the sum value of all subscriptions that decreased in value in a specific month.
Lost MRR	Overall recurring revenue lost in a specific month from canceled or closed subscriptions. This is the sum value of all monthly subscriptions that were canceled or closed in a specific month.
MRR Churn	The churn in recurring revenue from cancelled subscriptions and downgraded subscriptions.
New New MRR	This is the sum of new monthly recurring revenue plus expansion monthly recurring revenue minus lost monthly recurring revenue .
MRR Churn (%)	Monthly recurring revenue churn divided by monthly recurring revenue at the beginning of the month.

Notes about calculating churn and monthly recurring revenue:

- All MRR is considered new on the first month.
- Churn % cannot be calculated on the first month because all MRR is new.
- Revenue associated with suspended subscriptions does not count toward churn. Only revenue that has been lost or will be lost in the specific month contributed to MRR churn.
- If MRR at the beginning of the month equals zero (0), MRR churn cannot be calculated.

# SuiteBilling Features Provided by NetSuite SuiteApps

This chapter includes information about SuiteBilling features provided by SuiteApps from NetSuite.

- [Subscription Billing Enhanced UI](#) – This SuiteApp provides an enhanced user interface for Subscription Billing records.
- [SuiteBilling Enhancements](#) – This SuiteApp enables you to do the following:
  - Create usage records using a RESTlet
  - Perform subscription billing bulk operations
  - Process bulk customer payments

## Subscription Billing Enhanced UI

Subscription Billing Enhanced UI (formerly known as Time-Based Pricing SuiteApp) is a SuiteApp developed by NetSuite. This SuiteApp provides an enhanced user interface for subscription plans, price books, and subscriptions. It is designed for the creation and maintenance of complex subscription plans and subscriptions that require predefined pricing changes over time.

Subscription Billing Enhanced UI SuiteApp is provided free of charge to customers who use SuiteBilling and have enabled the Time-Based Pricing feature. For information about SuiteBilling features, see the help topic [SuiteBilling](#).

This SuiteApp provides an enhanced time-based pricing UI for:

- Creating and editing price books
- Creating and editing pricing intervals

Subscription Billing Enhanced UI SuiteApp also supports the following features:

- **Decimal precision** – Rounding to eight decimal places for the Price, Quantity, and Discount fields on the subscription plan, price book, and subscription records is supported. These fields also display up to eight decimal places. For more information, see [Decimal Precision in SuiteBilling](#).
- **Flat rate and percentage discounts** – Discount fields at the subscription plan and subscription line levels support flat rate and percentage discounts. For general information about applying discounts to SuiteBilling subscriptions, see [Applying Discounts to Subscriptions](#).
- **Recurring amount** – Recurring amount data is available on pricing intervals for recurring subscription lines on subscription records.
- **Proration by month** – By default, recurring subscription lines are prorated by day. The monthly proration option is available to recurring lines with a charge frequency that is greater than one month. You can set the proration option for recurring lines in the Prorate By field on subscription plans and subscriptions. For general information about proration options for SuiteBilling subscriptions, see [Proration Options](#).
- **Add-on items** – You can add subscription items to new or existing subscriptions at the time of sale or during the subscription term.
- **Add interval to multiple subscription lines** – You can create a new pricing interval for all recurring and usage subscription lines in the price book. For subscriptions, a new interval is created only for recurring and usage lines in Draft status.

Read the following topics for information about installing and using this SuiteApp:

- [Installing the Subscription Billing Enhanced UI SuiteApp](#)
- [Creating Items for Subscription Plans with Subscription Billing Enhanced UI](#)
- [Creating Subscription Plans with Subscription Billing Enhanced UI](#)
- [Managing Price Books and Price Plans with Subscription Billing Enhanced UI](#)
- [Managing Subscriptions with Subscription Billing Enhanced UI](#)

## Installing the Subscription Billing Enhanced UI SuiteApp

You can create subscription plans and subscriptions using the Time-Based Pricing feature before you install the SuiteApp. After you install the SuiteApp, all of your subscription plans, price books, and subscriptions automatically use the enhanced UI supported by the SuiteApp.

### Prerequisites

Before installing the Subscription Billing Enhanced UI SuiteApp you must enable SuiteBilling and Time-Based Pricing features:

- To enable SuiteBilling and prerequisite features, go to Setup > Company > Enable Features. Select the **Transactions** subtab and check the boxes for the required features under the Billing section. For information about SuiteBilling and prerequisite features, see [Enabling SuiteBilling Features](#).
- To enable the Time-Based Pricing feature, go to Setup > Company > Enable Features. Select the **Transactions** subtab, and check the Time-Based Pricing box under the Billing section. For more information about the Time-Based Pricing feature, see the help topic [Time-Based Pricing](#).

You should also review the following help topics for general information about SuiteBilling and its initial setup:

- [SuiteBilling Overview](#)
  - [SuiteBilling Terminology](#)
  - [SuiteBilling Process Diagrams](#)
  - [SuiteBilling Roles and Permissions](#)
  - [SuiteBilling Change Orders](#)
- [SuiteBilling Setup](#)
  - [Setting the SuiteBilling Preferences](#)
  - [Enabling SuiteBilling Features](#)

### Installation

After setting up SuiteBilling and enabling the Time-Based Pricing feature, you can install the SuiteApp from either the Enable Features page or the Search and Install Bundles page.

Subscription Billing Enhanced UI is a managed SuiteApp and is automatically updated whenever there are enhancements or new features added.

#### To install Subscription Billing Enhanced UI from the Enable Features page:

1. Go to Setup > Company > Enable Features.
2. Select the **Transactions** subtab, and scroll down to the Billing section.
3. Under Related SuiteApps, click the **Subscription Billing Enhanced UI SuiteApp** link.
4. On the SuiteApp Details page, click **Install**.

## To install Subscription Billing Enhanced UI from the Search and Install Bundles page:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. In the **Keywords** field, enter **Subscription Billing Enhanced UI**.
3. Under the **Name** column, select **Subscription Billing Enhanced UI**.
4. Click **Install**.

For more information about installing a SuiteApp, see the help topic [Installing a Bundle](#).

If you decide to uninstall the SuiteApp, any subscription plans created in the SuiteApp remain accessible and usable with the Time-Based Pricing feature. For more information, see the help topic [Uninstalling a Bundle](#).

## Creating Items for Subscription Plans with Subscription Billing Enhanced UI

A subscription plan is made up of all of the items that define a subscription. These items include recurring services, usage, and one-time charges. Before you can create a subscription plan, you must create item records for the products and services you sell as part of subscriptions.

**Note:** Creating items with the Subscription Billing Enhanced UI SuiteApp is the same as creating them using the Time-Based Pricing feature without the SuiteApp.

### To create an item for a subscription plan:

1. Go to Lists > Accounting > Items > New.
2. Subscription items must be either a non-inventory item or a service item for sale. Other item types are not available on subscription plans. Do one of the following:
  - To add a non-inventory item, under **Non-inventory Item**, click **For Sale** or **For Resale**.
  - To add a service item, under **Service Item**, click **For Sale** or **For Resale**.
3. In the **Item Name/Number** field, enter a value.
4. Specify values for the **Class**, **Department**, and **Location** fields, if needed.

**Note:** Subscription Billing Enhanced UI SuiteApp also lets you define or modify the class, department, and location for subscription lines. For more information, see [Class, Department, and Location Fields on Subscription Lines](#).

5. Complete any additional fields.
6. Click the **Accounting** subtab.
7. From the **Tax Schedule** list, select a tax schedule. To add a new tax schedule to the list, click the **Open** arrow.
8. Click the **Preferences** subtab.
9. Clear the **Can Be Fulfilled/Received** box.

**Note:** For non-inventory items, this box is checked by default and you must clear it. For service items, this box is cleared by default.

10. Click **Save**.

For more information on the item record and using items, see the help topic [Using Item Records](#).

## Creating Subscription Plans with Subscription Billing Enhanced UI

When you create a subscription plan, you specify the items, such as recurring services, usage, and one-time charges, to include in the subscription.



**Note:** Creating subscription plans with the Subscription Billing Enhanced UI SuiteApp is the same as creating them using the Time-Based Pricing feature without the SuiteApp.

### To create a subscription plan:

1. Go to Lists > Subscriptions > Subscription Plans > New.
2. In the **Subscription Plan Name** field, enter a name.
3. From the **Initial Term** list, do one of the following tasks:
  - Select a term. Options include the following:
    - **Evergreen Term** – Revenue ends after three years unless you set optional invoicing preferences to automatically extend revenue recognition.
    - **Standard Term** – The subscription-level end date defines the end date for all of the items. This results in the alignment of end dates. NetSuite calculates the end date as the subscription start date plus the indicated subscription term. One-time subscription lines are the exception, because they are only active for one day.
    - **Custom Term** – You must set the subscription-level end date at the subscription level. This date defines the end date for all of the items, resulting in the alignment of end dates. One-time subscription lines are the exception, because they are only active for one day. The subscription-level end date for a custom term remains editable until any subscription line becomes active.
  - Create a new term by clicking the plus icon.
4. Specify values for the **Class**, **Department**, and **Location** fields, if needed.



**Note:** Subscription Billing Enhanced UI SuiteApp also lets you define or modify the class, department, and location for subscription lines. For more information, see [Class, Department, and Location Fields on Subscription Lines](#).

5. On the **Lines** subtab, do the following for each item you want to add:
  - a. In the **Item** column, select an item. If the item list does not include an item you need for this subscription plan, see [Creating Items for Subscription Plans with Subscription Billing Enhanced UI](#).
  - b. In the **Required** column:
    - Check the box if you want the subscription to always include this item.
    - Clear the box if you want the customer to be able to include or exclude the item as an option at the time of sale.
  - c. In the **Type** column, select one of the following:
    - **One Time** – Items that incur a single charge, such as a setup or initialization fee.
    - **Recurring** – Items that incur charges throughout the subscription, such as recurring service.

- **Usage** – Items that incur charges based upon how much or how often the customer uses them, such as minutes or data.
- d. In the **Billing Mode** column, select one of the following:
    - **In Advance** – Payment is due at the beginning of the charge period (for example, the first day of the month).
    - **In Arrears** – Payment is due at the end of the charge period (for example, the last day of the month).
  - e. If required, for recurring items, check or clear the **Prorate Start Date** and **Prorate End Date** boxes. For details, see [Proration Options](#).
  - f. In the **Include in Renewal Subscription** column, click the down arrow to display the available renewal options and select a different option if desired.
  - g. Click **Add**.
6. Repeat step 4 until you have added all items to the subscription plan.
7. Complete any necessary additional fields, and then click **Save**.

When you save the subscription plan, NetSuite opens the **Price Books** subtab. After creating a subscription plan, the next task is to create a price book by creating a price plan for each item. With the Subscription Billing Enhanced UI SuiteApp, you can create price books and price plans for your subscription plans using an enhanced time-based pricing UI. For more information, see [Managing Price Books and Price Plans with Subscription Billing Enhanced UI](#).

## Managing Price Books and Price Plans with Subscription Billing Enhanced UI

After you save a subscription plan, you can create pricing for the items. A price book defines the pricing for a collection of items or services that are sold as part of a subscription plan. Every item on a subscription plan must be assigned to a price plan within the price book. A subscription plan can have one or multiple price books. You can use multiple price books to create different pricing options, such as multiple currencies, or monthly, quarterly, and annual pricing.

The following section describes the price book and price plan UI when the Subscription Billing Enhanced UI SuiteApp is installed in your NetSuite account. For a step-by-step procedure on creating price books and price plans using the SuiteApp, see [Creating Price Books and Price Plans for Subscription Plans](#).

## Enhanced UI for Price Book and Price Plan

You can create a new price book for a subscription plan by clicking the **New Price Book** button on the **Price Books** subtab of a saved subscription plan.

Each item from the subscription plan appears as a line on the New Price Book window. The lines are color-coded based on the line type:

- One-time lines appear with a left-justified blue line.
- Recurring lines appear with a left-justified green line.
- Usage lines appear with a left-justified orange line.

## New Price Book

**Save** | **Cancel**

NAME\*  CURRENCY\*

### Item Pricing

Fitness Assessment One Time	Start Month 1 ... Pricing <b>Tiered</b> Discount <b>0.00</b> Charged <b>One Time</b> Repeat Every <b>One Time</b> Above <b>0</b> Value
55min. Junior Physio Coach Personal Training Session Usage	Start Month 1 ... Pricing <b>Volume</b> Discount <b>0.00</b> Charged <b>Monthly</b> Repeat Every <b>1 Month</b> From <b>0</b> Value
30 min. Physio-Led Stretch Session Recurring	Start Month 1 ... Pricing <b>Tiered</b> Discount <b>0.00</b> Charged <b>Monthly</b> Repeat Every <b>1 Month</b> Prorate By <b>Day</b> Above <b>0</b> Value

Each line contains a pricing interval box that you can open to set the details of the price plan. On pricing interval edit mode, you can set the details of the price plan, including start, pricing details, and rating information. For information about the fields on a price plan, see [Creating Price Books and Price Plans for Subscription Plans](#).

**Item Pricing**

Fitness Assessment  
One Time

Start Month 1

PRICING MODEL Tiered

DISCOUNT

CHARGE FREQUENCY\* One Time REPEAT EVERY\* 0

ABOVE QUANTITY \* PRICING OPTION VALUE \* MIN AMOUNT MAX AMOUNT

0 Rate

+ (plus sign button)

On pricing interval view mode, you can click the ellipsis icon to show the possible actions for the pricing interval. For one-time lines, only **Edit** is available. For recurring and usage lines, available actions shown are **Edit**, **Make Copy**, and **Delete** (not available for the first interval).

30 min. Physio-Led Stretch Session Recurring

Start Month 1

Pricing Tiered

Discount 0.00

Charged Monthly

Repeat Every 1 Month

Prorate By Day

Above Value

0 \$500.00

... (ellipsis icon)

Edit (highlighted with red box and cursor icon)

Make Copy

+ (plus sign button)

For recurring and usage items, you can also click the plus (+) icon on the right side of the last pricing interval to add a new pricing interval.

You cannot delete the first interval for any line, but you can edit it. To delete a pricing interval that is no longer needed, click the delete icon if the box is open in edit mode, or click the ellipsis icon and select **Delete** in view mode.

30 min. Physio-Led Stretch Session Recurring

Start Month 1

Start Month 13

Pricing Tiered

Discount 0.00

Charged Monthly

Repeat Every 1 month(s)

Prorate By Day

Above Value

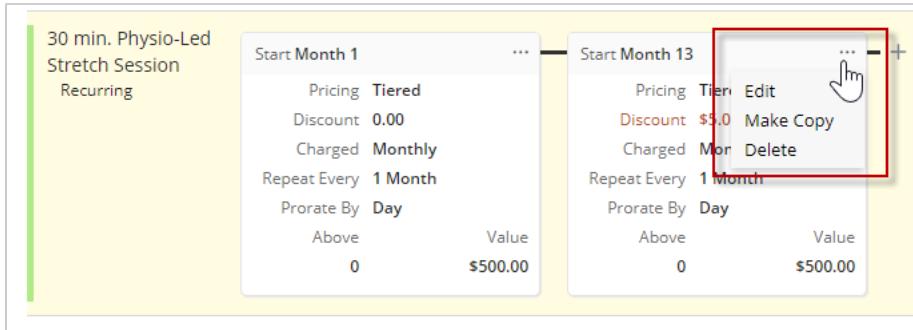
0 \$500.00

... (ellipsis icon)

✓ (checkmark icon)

Delete (highlighted with red box and cursor icon)

+ (plus sign button)



As you create pricing intervals, they appear linked, in sequence, across the line. If the number of pricing intervals exceed the current viewing area, use the vertical scroll bar at the bottom of the subscription line to view pricing intervals that extend to the next page.

On the top left corner of the price book, you can find the following:

- **Quick View** – Click this icon to display a graphical price book summary, showing all pricing intervals with their duration.
- **Filter** – Click this icon and check the appropriate boxes to filter the plan item attributes that you want to view.
- **Add Interval To All** – Click this button to create a new pricing interval for all recurring and usage lines in the price book. After the new interval is created, you can edit the pricing information as needed.



**Note:** Pricing intervals that are located next to each other must be unique. If you have two identical adjacent pricing intervals, NetSuite combines them into one interval.

For more information, see [Adding a Price Interval To All Items At Once](#).

The screenshot shows the 'Price Book' creation screen. It includes fields for 'NAME\*' (Physio-Led Stretch (30 sessions)) and 'CURRENCY\*' (USA). Below these, under 'Item Pricing', there is a section for 'Fitness Assessment One Time' with a pricing interval. A red box highlights the 'Add Interval To All' button at the bottom left of the 'Item Pricing' section.

For detailed instructions on creating price books and price plans, see [Creating Price Books and Price Plans for Subscription Plans](#).

## Creating Price Books and Price Plans for Subscription Plans

After you save a subscription plan, you can create a price book by setting up a price plan for each item. For information about how to create subscription plans, see [Creating Subscription Plans with Subscription Billing Enhanced UI](#).

The following procedure describes how to create price books and price plans using the enhanced time-based pricing UI provided by the Subscription Billing Enhanced UI SuiteApp.

### To create price books and price plans using the Subscription Billing Enhanced UI SuiteApp:

1. Open a saved subscription plan record in view mode.
2. Click the **Price Books** subtab.
3. To create a new price book, click **New Price Book**.
4. In the **Name** field, enter a name for the new price book.
5. In the **Currency** field, select the appropriate currency for the price book.
6. Set up the price plan for each item in the price book.
  - a. To edit a pricing interval, click anywhere on the pricing interval box or click the ellipsis icon on the top right corner of the box and select **Edit**.
  - b. Select a start interval from the list and enter the number for when you want the interval to start. For example, Month 1 or Month 6.



**Note:** You can set the start interval to Week, Month, or Year only for the first interval. You cannot change this value on succeeding pricing intervals. Also, the first pricing interval for each item always begins with an interval start of 1 and cannot be edited. For example, the first pricing interval is always Week 1, Month 1, or Year 1.

- c. In the **Pricing Model** field, select one of the following:
  - **Tiered** – This pricing model is based on the incremental quantity sold. It is commonly used for recurring items. Tiered pricing charges a specified rate for all items sold in the tier (for example, the first 10 items). When the quantity sold exceeds the upper limit for the tier, NetSuite charges the price specified for the next tier for the additional items.
  - **Volume** – This pricing model is based on the aggregate quantity sold. It is commonly used for usage pricing. For volume pricing, the total quantity sold defines the charge rate for all items in the order.
- d. In the **Discount** field, enter a discount, if applicable. Both percentage and flat rate discounts are supported. To enter a percentage discount, include the percentage sign (%) after the positive number you enter in the **Discount** field. To enter a flat rate discount, enter the numeric value only.
- e. For usage lines, enter a value in the **Included Quantity** field, if applicable.
- f. For recurring or usage lines, set how often you want the charge to occur by selecting a **Charge Frequency** and entering a number in the **Repeat Every** field.

In the **Repeat Every** field, you can enter any positive integer from 1 up to the maximum value, depending on the **Charge Frequency**:

- If **Charge Frequency** is set to **Annually**, the maximum value for the **Repeat Every** field is 10.
- If **Charge Frequency** is set to **Monthly** or **Weekly**, the maximum value for the **Repeat Every** field is 120.

- g. For recurring lines, select a proration option in the **Prorate By** field. You can set the value for this field only on the first pricing interval of a recurring line. The default setting is Prorate by Day. If the charge frequency is more than one month, you have the option to select Prorate by Day or Month.
- h. Set the values for the price tiers. For each tier, enter values for the following:
  - **Above Quantity** (required) – Default value is zero for the first tier. For succeeding tiers, the value you specify in this field indicates the upper limit for the previous tier.
  - **Pricing Option** (optional) – Select one of the following options:
    - **Rate** (default) – Calculates the item amount as quantity multiplied by rate.
    - **Fixed Amount** – The defined charge amount for the item is not affected by its quantity.
  - **Value** (required) – Enter an amount to charge for the item.
  - **Min Amount** (optional) – Enter the minimum amount limit for the tier.
  - **Max Amount** (optional) – Enter the maximum amount limit for the tier.

Click the plus (+) icon on the right side of the tier to create a new pricing tier for additional quantities.

- i. When you are finished entering information in the pricing interval, click the check icon on the top right corner of the box to save your changes.

**Note:** When you save a price plan for the first time, a popup window appears indicating that after the price plan is saved, the price book currency cannot be changed. Verify if the currency is correct, then click **OK** to save the price plan. Click **Cancel** if you want to change the currency before saving the price plan..

7. To create additional pricing intervals for recurring and usage lines, do any of the following:
  - To create a new interval, click the plus (+) icon on the right side of the last interval.
  - To create a copy of an existing pricing interval, click the ellipsis icon on the pricing interval and select **Make Copy**. The pricing interval for one-time lines cannot be copied.
  - To create a new interval for all recurring and usage lines in the price book, click the **Add Interval To All** button at the top of the price book. For more information, see [Adding a Price Interval To All Items At Once](#).

Edit the pricing information for additional or copied pricing intervals as needed.

**Note:** Pricing intervals that are located next to each other must be unique. If you have two identical adjacent pricing intervals, NetSuite combines them into one interval.

8. Repeat step 6 (and step 7 as needed) for each item in the price book. Every item in a subscription plan must have an associated price plan.
9. To save the price book, click **Save** on the price book window.

You can view the price books that you created on the **Price Books** subtab of the subscription plan. Click the name of the price book to view the price book details. It may take a few seconds for all of the information to appear. For each price book, you can do the following actions by clicking the appropriate icon on the top left corner of the **Price Books** subtab:

ITEM	LINE TYPE	REQUIRED
Fitness Assessment	One Time	
55min. Junior Physio Coach Personal Training Session	Usage	
30 min. Physio-Led Stretch Session	Recurring	

- **Quick View** – Click this icon to show the price book summary in graphical form.
- **Edit** – Click this icon to open an existing price book for editing.
- **Make Copy** – Click this icon to create a copy of the price book. For example, a new price book may be needed for a different currency.
- **Delete** – Click this icon to delete a price book.

## Managing Subscriptions with Subscription Billing Enhanced UI

The Subscription Billing Enhanced UI SuiteApp includes an enhanced subscription record UI, which provides access to both subscription lines and pricing intervals in a single display subtab.

For information about the changes to the subscription record when the SuiteApp is installed, see [Enhanced UI for Subscription](#).

Read the following topics for information about creating and managing subscriptions and subscription lines using the enhanced UI provided by the SuiteApp:

- [Creating Subscriptions with Subscription Billing Enhanced UI](#)
- [Editing Subscription Lines on Subscriptions](#)
- [Managing Add-On Items on Subscriptions](#)

## Enhanced UI for Subscription

When the Subscription Billing Enhanced UI SuiteApp is installed in your NetSuite account, the **Lines** subtab on the subscription record shows an enhanced UI instead of the subscription line sublist. The **Pricing** subtab is also removed from the subscription record.

With the enhanced UI of the **Lines** subtab, you can see the subscription lines, price plans, and pricing intervals displayed on a single subtab.

For each subscription line, you can see the subscription item name, line type, billing mode, and status. If you enabled per-line classifications, the **Class**, **Department**, and **Location** fields are also available at the

subscription line level. For more information, see [Class, Department, and Location Fields on Subscription Lines](#).

The initial pricing intervals for subscription lines are based on the subscription plan and price book that you selected in the subscription header fields. Each pricing interval shows the following price plan details on view mode:

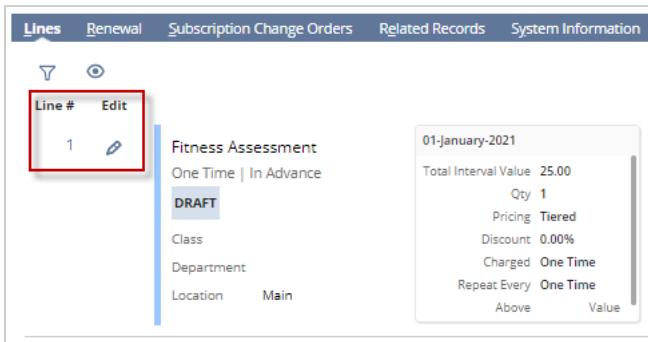
- Start and end dates based on the start date and price book selected in the subscription header fields
- Status of the pricing interval if there is a change order (other than modify pricing) applied to the subscription
- Detailed pricing information, including price tiers

Any setting that is different from the previous period is also shown in colored text. If available, you can use the vertical scroll bars on the pricing interval to show other details that are not available in the current viewing area.

Line #	Description	Pricing Interval	Total Interval Value	Recurring Amt	Qty	Pricing	Discount	Charged	Repeat Every	Above	Value
1	Fitness Assessment One Time   In Advance <b>DRAFT</b>	01-january-2021	25.00		1	Tiered	0.00%	One Time	One Time		
2	Membership Fee Recurring   In Advance <b>DRAFT</b>	01-january-2021 - 31-december-2021	600.00	\$50.00	1	Tiered	0.00%	Monthly	1 Month		
		01-january-2022 - 31-january-2022		\$25.00	1	Tiered	50.00%	Monthly	1 Month		
		01-february-2022 - 31-december-2022		\$50.00	1	Tiered	0.00%	Monthly	1 Month		
3	55 min. Junior Physio Coach Personal Training Session Usage   In Arrears <b>NOT INCLUDED</b>	01-january-2021 - 31-march-2021			3	Tiered	25.00%	Monthly	1 Month		
		01-april-2021 - 31-december-2022			10	Tiered	0.00%	Monthly	1 Month		
					0	Above	\$20.00				
					10	Value	\$10.00				

The following features are also available on the enhanced UI of the **Lines** subtab:

- **Access to Subscription Line Records** – From the subscription record (view mode), you can access the subscription line record by doing any of the following:
  - To open the subscription line record on view mode, click the number in the **Line #** column.
  - To open the subscription line record on edit mode, click the edit icon in the **Edit** column.

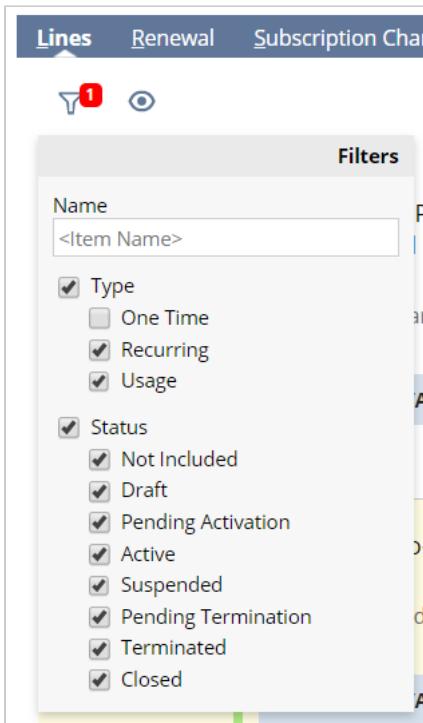


The subscription line record opens in a new browser tab. The subscription page will refresh after you save the changes that you made to the subscription line record.

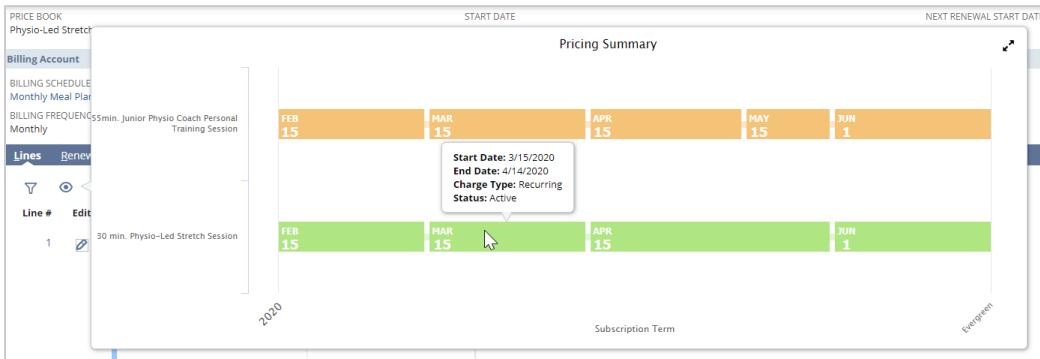
You can also edit subscription lines directly from the subscription record. For more information, see [Editing Subscription Lines on Subscriptions](#).

- **Subscription Line Filters** – Using the filter icon on the top left corner of the **Lines** subtab, you can filter the subscription lines by name, type, or status.

When you apply filters, the filter icon shows a badge with the number of subscription lines that are not shown.

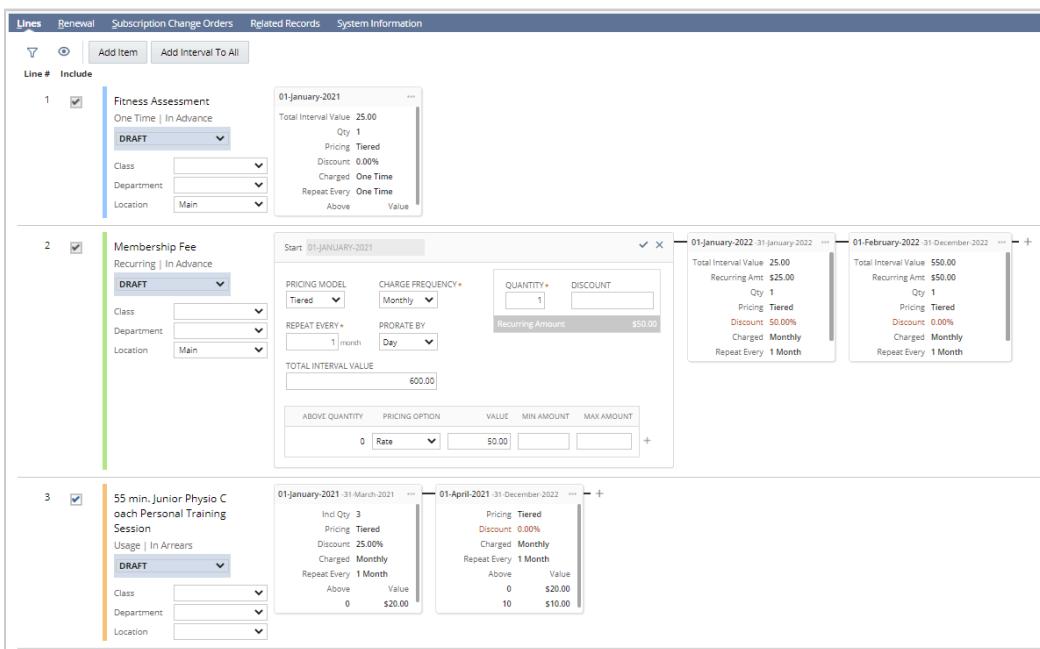


- **Quick View** – Using the quick view icon on the top left corner of the **Lines** subtab, you can view the pricing summary of the subscription lines. On the quick view pane, you can click the expand icon on the top right corner to see an expanded view of the pricing summary.



- **Editing Subscription Lines and Pricing Intervals** – When you are creating or editing a subscription record, you can perform the following actions for the subscription lines on the **Lines** subtab:

- Check the **Include** box for optional items if you want to include it to the subscription. Clear the box to exclude an optional item.
- Change the status of subscription lines from Draft to Pending Activation, or vice versa.
- If the **Class**, **Department**, and **Location** fields are available, you can set or modify the classification if the line status is Draft or Not Included.
- Modify the pricing intervals of subscription lines with a Draft status. Click the ellipsis icon on the top right corner of each interval to show possible actions for each pricing interval: **Edit**, **Make Copy** (available only for recurring and usage lines), or **Delete** (not available for the first pricing interval).
- Create new pricing intervals for all recurring and usage lines with a Draft status by clicking the **Add Interval To All** button.
- Add items to the subscription by clicking the **Add Item** button.



For more information about creating and editing subscriptions with the Subscription Billing Enhanced UI SuiteApp, read the following topics:

- [Creating Subscriptions with Subscription Billing Enhanced UI](#)

- [Editing Subscription Lines on Subscriptions](#)
- [Managing Add-On Items on Subscriptions](#)

## Creating Subscriptions with Subscription Billing Enhanced UI

After creating items, subscription plans, and price books, you can create a subscription.

For instructions on how to create the prerequisite parts of a subscription, see the following topics:

- [Creating Items for Subscription Plans with Subscription Billing Enhanced UI](#)
- [Creating Subscription Plans with Subscription Billing Enhanced UI](#)
- [Creating Price Books and Price Plans for Subscription Plans](#)
- [Creating Billing Accounts](#)

You can activate a subscription only after you create and save the subscription's required components.

**Note:** Creating subscriptions with the Subscription Billing Enhanced UI SuiteApp is the same as creating a standalone subscription using the Time-Based Pricing feature without the SuiteApp.

### To create a new subscription using the Subscription Billing Enhanced UI SuiteApp:

1. Go to Transactions > Subscriptions > Create Subscriptions.
2. In the Primary Information section, select from the list or enter values for the following fields in any order:
  - Indicate the customer for whom you are creating the subscription:
    - From the **Customer** field, select an active customer from the list.
    - To create a new customer, click the plus icon next to the **Customer** field and select **-New-**. You can select any active customer, regardless of whether they have a billing account. When you select a customer, the **Subsidiary** and **Currency** fields contain the values you specified for those fields for that customer. When you select values for the **Customer** and **Subsidiary** and leave **Currency** blank, the **Billing Account** field shows the billing accounts that are available for that customer.
  - You can set a subsidiary to use in a new billing account before creating it. If the customer has subsidiaries, indicate them as follows:
    - From the list in the **Subsidiary** field, select an active subsidiary. NetSuite populates the **Subsidiary** fields of the subscription record with the field's values from the billing account.
    - You can change the subsidiary from the primary subsidiary to a secondary subsidiary. The subscription must be in Draft or Pending Activation status to change the subsidiary.
    - To create a new subsidiary, click the plus icon and select **-New-**.
  - You can set a currency to use in a new billing account before creating it. Indicate the currency as follows:
    - From the list in the **Currency** field, select an active currency. NetSuite populates the **Currency** fields of the subscription record with the field's values from the billing account.
    - You can change the currency when the subscription is in Draft or Pending Activation status.
    - To create a new currency, click the plus icon and select **-New-**.

- (Optional) You can create a subscription without a billing account until you activate the subscription. You can select a billing account from the list in the **Billing Account** field, or to create a new billing account, click the plus icon and select **-New-**. To create a new billing account, follow the instructions in [Creating Billing Accounts](#).

On the subscription record, the **Customer**, **Subsidiary**, and **Currency** fields are required for creating a billing account. When you have selected a customer on the subscription record, the **Billing Account** field contains the customer's default billing account. When all lines in the subscription are in Draft or Pending Activation status, you can change the billing account to another billing account for the same customer. When you select a billing account, the **Subsidiary** and **Currency** fields are read only and contain the values for those fields from the billing account.

The billing account is not required on default forms. Any automation or import templates work when you set a billing account value when you create the subscription.

You cannot activate a subscription until you select a billing account that matches the values of the **Customer**, **Currency**, and **Subsidiary** fields on the subscription record.



**Note:** To ensure accurate data, select the **Billing Account**, **Customer**, or **Subsidiary** before selecting the subscription plan and price book

- From the **Subscription Plan** list, select a subscription plan. The **Subscription Plan** field lists the subscription plans for the selected billing account. If you have not selected a billing account, you must select values for the **Currency** and **Subsidiary** fields to select a subscription plan.  
Only subscription plans with price books in the currency that corresponds to the selected price book currency are available to select.
- If required, from the **Price Book** list, choose a different price book.
- From the **Initial Term** list, select a term, or select **-New-** to define a different term.
- In the **Start Date** field, enter or select a start date for the subscription. The default value is today's date.
- You can define the **Class**, **Department**, and **Location** fields for subscription records in Draft status. These fields, located in the Plan and Term section, are useful for reporting. The values of these fields on the subscription record are automatically populated in the following order:
  - If the selected subscription plan has values in any of the **Class**, **Department**, and **Location** fields, the field on the subscription record shows its subscription plan value.
  - If a field does not have a value in the subscription plan, NetSuite checks the billing account and the field on the subscription record shows its billing account value, if any.
  - If neither the subscription plan nor the billing account have values in these fields, they are empty on the subscription record.



**Note:** If you enabled per-line classifications, you can also set or modify the classifications at the subscription line level. For more information, see [Class, Department, and Location Fields on Subscription Lines](#).

- Edit the subscription lines on the **Lines** subtab as needed. For information about the actions that you can perform on subscription lines, see [Editing Subscription Lines on Subscriptions](#).
- If required, define one or more add-on items. See [Managing Add-On Items on Subscriptions](#).
- If Revenue Recognition is enabled, set revenue recognition options. To enable Revenue Recognition, see the help topic [Enabling the Revenue Recognition Feature](#).



**Note:** After you click **Save**, you cannot change the subscription's customer, currency, or subsidiary. In this case, you must create a new subscription.

11. Click **Save**.

If a billing account that you expect to process during billing operations does not process, run billing operations a second time or schedule billing operations for a convenient time for your business. Reasons why a billing account is not processed during billing operations include:

- A charge is created after billing operations begins processing charges.
- A single billing operation can process up to 100,000 processing lines.

Running a subsequent billing operation may process any remaining invoices. For more information on Billing Operations, see the help topic [Billing Operations](#).

After you have created the subscription, you must individually activate each line item. For more information, see [Activating Subscription Line Items](#).

After creating the subscription, you can either associate it with a sales transaction or activate it.

## Editing Subscription Lines on Subscriptions

The information in this section applies to subscriptions that use the enhanced UI supported by Subscription Billing Enhanced UI SuiteApp.

When you create a subscription, the initial pricing intervals of subscription lines are generated based on the subscription plan and price book that you selected in the header fields.

You can edit a subscription lines in Draft status.

### To edit the subscription lines on a subscription:

1. Create a new subscription or edit a subscription with a Draft status. For information about creating subscriptions, see [Creating Subscriptions with Subscription Billing Enhanced UI](#).
2. On the **Lines** subtab, edit the subscription line-level fields if necessary:
  - **Include** – For optional items, you can check or clear this box. When you check this box for an optional item, the subscription line status changes from Not Included to Draft. For required items, this box is checked by default and is not editable.
  - **Status** – Click the dropdown field to change the status of the subscription line from Draft to Pending Activation, or vice versa. This field is editable only if the subscription line is included and its status is Draft or Pending Activation.
  - **Class, Department, Location** – Set or modify the values for the classification fields. You can change the values for these fields only if the subscription line status is Draft or Not Included. For information about how the **Class, Department**, and **Location** fields on subscription lines are populated, see [Class, Department, and Location Fields on Subscription Lines](#). By default, these fields show all active classes, departments, and locations. You can also use public saved searches to define the list of options for these fields. For more information, see [Setting Up the List of Class, Department, and Location Options for Subscription Lines](#).
3. To edit a pricing interval for a subscription line, click the ellipsis icon on the top right corner of the box and select **Edit**. You can also click anywhere on the pricing interval box to open it for editing (if the subscription line is included) or viewing (if the subscription line is not included). The price plan fields that you can edit vary depending on the subscription line type and sequence of the pricing interval. These fields are available in the price plan details:
  - **Start** – Enter a different date or select from the date picker.

■ **Pricing Model** – Select one of the following:

- **Tiered** – This pricing model is based on the incremental quantity sold. It is commonly used for recurring items. Tiered pricing charges a specified rate for all items sold in the tier (for example, the first 10 items). When the quantity sold exceeds the upper limit for the tier, NetSuite charges the price specified for the next tier for the additional items.
- **Volume** – This pricing model is based on the aggregate quantity sold. It is commonly used for usage pricing. For volume pricing, the total quantity sold defines the charge rate for all items in the order.

■ **Charge Frequency** and **Repeat Every** – For recurring and usage lines, set how often you want the charge to occur. You can set the values for these fields only on the first pricing interval.

In the **Repeat Every** field, you can enter any positive integer from 1 up to the maximum value, depending on the value set for **Charge Frequency**:

- If **Charge Frequency** is set to **Annually**, maximum value for **Repeat Every** field is 10.
- If **Charge Frequency** is set to **Monthly** or **Weekly**, maximum value for **Repeat Every** field is 120.

■ **Total Interval Value** – If you want to set the charge amount for the interval instead of using the price plan value, enter the charge amount in this field. This field is available only for recurring and one-time lines. You can set the value for this field only if the line status is Draft. In addition, for recurring lines, this field is editable only if the initial term for the subscription is not Evergreen.

Take note of the following when using the total interval value:

- When you set a total interval value and confirm that you want to use it instead of the price plan value, the price plan value will be cleared. When you save the subscription, the price plan value will be calculated based on the total interval value that you set.
- If you modify the price plan value after setting the total interval value, the total interval value will be cleared when you confirm that you want to use the price plan value. If total interval value is not set, its value will be calculated based on the price plan value when you save the subscription.

■ **Prorate By** – For recurring lines, select a proration option. You can set the value for this field only on the first pricing interval of a recurring line. The default setting is Prorate by Day. If the charge frequency is more than one month, you have the option to select Prorate by Day or Month.

■ **Quantity** – For recurring or one-time lines, enter a quantity that is greater than zero. Initial value for an existing pricing interval is 1. However, if you make a copy of an existing pricing interval or add a new interval, the **Quantity** field on the new pricing interval is set to blank.

■ **Included Quantity** – For usage lines, enter a value that is greater than zero for included quantity, if applicable.

■ **Discount** – Both percentage and flat rate discounts are supported. To enter a percentage discount, include the percentage sign (%) after the positive number that you enter in the **Discount** field. To enter a flat rate discount, enter the numeric value only.

■ **Recurring Amount** – For recurring lines, this field shows the recurring amount value based on the rate or fixed amount, quantity, and discount.

■ Price tiers – Edit the existing values for **Above Quantity**, **Pricing Option**, **Value**, **Min Amount**, and **Max Amount** as needed. You can also create new tiers by clicking the plus (+) icon on the right side of an existing price tier.

4. When you are finished editing a pricing interval, click the check icon on the top right corner of the box to save your changes. If you want to discard your changes, click the X icon instead.
5. To create additional intervals for recurring and usage lines, do any of the following:

- To create a single pricing interval for a subscription line, click the plus (+) icon on the right side of the last pricing interval.
- To copy an existing pricing interval, click the ellipsis icon on the top right corner of the pricing interval and select **Make Copy**.
- To create a new interval for all recurring and usage lines in the subscription, click the **Add Interval To All** button at the top of the **Lines** subtab. This action creates a new pricing interval for all recurring and usage lines in Draft status. For more information, see [Adding a Price Interval To All Items At Once](#).

Edit the pricing information for additional or copied pricing intervals as needed.



**Note:** Pricing intervals that are located next to each other must be unique. If you have two identical adjacent pricing intervals, NetSuite combines them into one interval.

6. If you want to delete a pricing interval, click the ellipsis icon on the pricing interval and select **Delete**. You cannot delete the first interval for any subscription line.
7. When you are finished editing the subscription lines and pricing intervals on the **Lines** subtab, click the **Save** button on the subscription record to save your changes.

## Class, Department, and Location Fields on Subscription Lines

With Subscription Billing Enhanced UI SuiteApp, you can set or modify the class, department, and location of a subscription line if the following features are enabled in your NetSuite account:

Classification Fields on Subscription Lines	To show the field on subscription lines		To make the classification field mandatory
	Enable Features (Company)	Accounting Preferences (General)	
Class	Class	Allow Per-Line Classes	Make Classes Mandatory
Department	Department	Allow Per-Line Departments	Make Departments Mandatory
Location	Location	Allow Per-Line Locations	Make Locations Mandatory

When the **Class**, **Department**, and **Location** fields are available on subscription lines, these fields are automatically populated in the following order:

1. If the item used in the subscription line has values in any of the **Class**, **Department**, and **Location** fields, the field on the subscription line shows the value specified on the item record.
2. If a field does not have a value on the item record, the field on the subscription line shows the value specified on the subscription plan.



**Important:** The SuiteApp uses the classification set on the subscription plan record, not the classification set on the subscription under the Plan and Term section.

3. If a field does not have a value on the item record and subscription plan, the field on the subscription line shows the value specified on the billing account.
4. If a field does not have a value on the item record, subscription plan, and billing account, the field on the subscription line is set to blank.

You can modify the values in the **Class**, **Department**, and **Location** fields if the subscription line status is Draft or Not Included. To change the classification of a subscription line, open the subscription

record or subscription line record in edit mode. For more information, see [Editing Subscription Lines on Subscriptions](#).

## Setting Up the List of Class, Department, and Location Options for Subscription Lines

By default, you can select all active classes, departments, and locations in the **Class**, **Department**, and **Location** fields on subscription lines. If you want to modify the list of options that can be selected at the subscription line level, you can define a public saved search for classes, departments, and locations. Then, you can specify the saved searches in the Subscription Billing Enhanced UI preferences.



**Important:** The SuiteApp automatically adds the following filters to any saved search specified in these preferences:

- Subsidiary filter based on the subscription subsidiary
- Inactive filter to ensure that the list of options include only active records

To avoid any issues, do not include subsidiary and inactive filters in saved searches that you plan to use for these preferences.

To set these preferences, go to Setup > Company > General Preferences. Click the **Custom Preferences** subtab, then select the appropriate saved search for the following preferences under Subscription Billing Enhanced UI Feature section:

- **Classes Saved Search** – Select the saved search that you want to use to define the list of options for classes in subscription lines.
- **Departments Saved Search** – Select the saved search that you want to use to define the list of options for departments in subscription lines.
- **Locations Saved Search** – Select the saved search that you want to use to define the list of options for locations in subscription lines.

Click the **Save** button on top of the General Preferences page to save your changes.

Subscription Billing Enhanced UI uses the search results from the specified saved searches to define the options for the corresponding fields on subscription lines.

## Managing Add-On Items on Subscriptions

The Add-On Items feature enables you to add subscription lines to a subscription using items that are not originally part of the subscription plan. You can add items upon creation, at the time of sale, or any time during the subscription term. This feature simplifies the workflow by reducing the number of steps required to create a new subscription or upsell an existing subscription. For information about enabling the Add-On Items feature, see [Enabling SuiteBilling Features](#).

The Subscription Billing Enhanced UI SuiteApp includes support for add-on items on new or existing subscriptions.

For information about setting up the list of items that can be used as add-on items, see [Setting Up the List of Available Add-On Items](#).

For information about adding items to a subscription using the enhanced UI provided by the SuiteApp, see [Adding Items to a Subscription](#).

## Setting Up the List of Available Add-On Items

By default, you can select any active service or non-fulfillable non-inventory items as add-on items. If you want to modify the list of items that can be added to a subscription, you can define a saved search for add-on items.

Subscription Billing Enhanced UI SuiteApp includes a predefined item saved search that you can use as a template to set up the add-on items list. After setting up the item saved search, you need to select it in the **Add On Items Saved Search** field on the General Preferences page for the company.

### To set up the list of items that can be used as add-on items:

1. Go to Lists > Search > Saved Searches.
2. On the saved search list, look for the item saved search with the following details:
  - Title: TBP\_AddOn\_Items
  - ID: customsearch\_tbp\_add\_on\_items
 Click the **Edit** link for the saved search.
3. In the **Search Title** field, enter a unique title for the saved search.
4. Make sure that the **Public** box is checked.
5. On the **Criteria** subtab, set the filters that you want to use for the add-on items saved search. The following filters are set by default.

The screenshot shows the 'Criteria' subtab of a saved search. The table lists the following filters:

NOT	PARENTS	FILTER *	DESCRIPTION *	FORMULA	PARENTS	AND/OR
	(	Type	is Service			Or
	(	Type	is Non-inventory Item			And
		Can be Fulfilled	is false	)		And
		Inactive	is false			

At the bottom, there are buttons for Add, Cancel, Insert, and Remove.



**Important:** In addition, the SuiteApp automatically adds the following filters to the saved search that you specify in the **Add On Items Saved Search** preference:

- Subsidiary filter based on the subscription subsidiary
- Inactive filter to ensure that the list of options include only active records

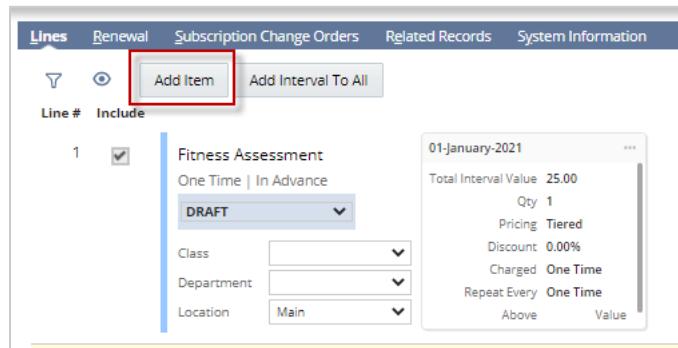
To avoid any issues, do not include subsidiary and inactive filters in the saved search that you plan to use for this preference.

6. If you want to see the list of items that will be included based on your search criteria, click the **Preview** button. Click **Return to Criteria** to go back to the saved search definition page.
7. When you are done setting up the criteria for the add-on item saved search, click **Save As**.
8. After setting up the saved search, you need to select it in the **Add On Items Saved Search** field on the General Preferences page for the company.
  - a. Go to Setup > Company > General Preferences.
  - b. Go to the **Custom Preferences** subtab.

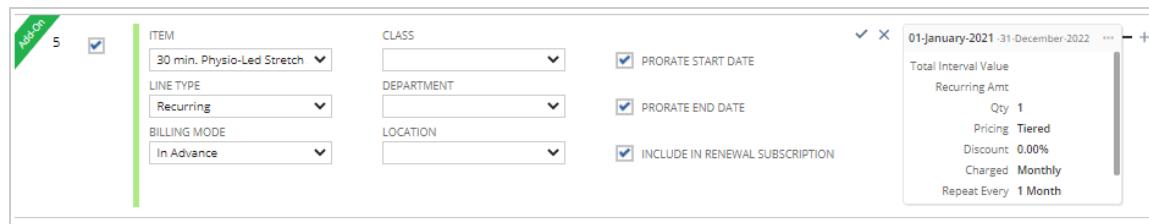
- c. In the **Add On Items Saved Search** field under Subscription Billing Enhanced UI, select the add-on items saved search that you created.
- d. Click **Save**.

## Adding Items to a Subscription

If you enabled the Add-On Items feature, you can add subscription lines to new or existing subscriptions. When the Subscription Billing Enhanced UI SuiteApp is installed in your NetSuite account, the **Add Item** button is available on the top left corner of the **Lines** subtab when you edit a subscription.



Add-on items are optional, but the **Include** box is initially checked when you create the item. Additional items are marked as **Add-On** on the top left corner of the subscription line.



Add-on items have no predefined pricing, so you need to set the price of each item as you create it. Proration is permitted for recurring lines, but not permitted for one time and usage lines.

An add-on item in a subscription cannot be deleted after you saved the changes to the subscription. However, you can edit the item or add more items even after saving the subscription. If the add-on item is still in Draft status, you can change the status to Not Included by editing the subscription and clearing the Included box for the subscription line. After you add an add-on item to the subscription, that item follows the same workflow as any subscription line.

### To add a new item to a subscription:

1. Open a subscription record in edit mode. To see the list of subscriptions, go to Transactions > Subscriptions > Create Subscriptions > List.
2. On the **Lines** subtab and click the **Add Item** button on the top of the subscription lines list.
3. On the new line for the add-on item, set up the details for the item that you want to add:
  - **Item** – Select the add-on item. By default, this field shows active service and non-fulfillable non-inventory items. If you defined a saved search in the **Add On Items Saved Search** field on General Preferences page, this field shows the search results based on the criteria that you set on the saved search. For more information, see [Setting Up the List of Available Add-On Items](#).
  - **Line Type** – Select one of the following:
    - **One Time** – Items that incur a single charge, such as a setup or initialization fee.

- **Recurring** – Items that incur charges throughout the subscription, such as recurring service.
- **Usage** – Items that incur charges based upon how much or how often the customer uses them, such as minutes or data.
- **Billing Mode** – Select when you want to bill the charges for the add-on item. One time or recurring amount charges can be billed in advance or in arrears. Usage charges are always billed in arrears.
- **Class, Department, Location** – If you enabled per-line classifications, specify the class, department, and location for the add-on item. For information about setting classifications for subscription lines, see [Class, Department, and Location Fields on Subscription Lines](#).  
By default, these fields show all active classes, departments, and locations. You can also use public saved searches to define the list of options for these fields. For more information, see [Setting Up the List of Class, Department, and Location Options for Subscription Lines](#).
- **Prorate Start Date** and **Prorate End Date** – You can prorate the charges for recurring lines by keeping these boxes checked. Clear the boxes if you do not want to apply proration. Proration is not permitted for one time and usage lines.
- **Include in Renewal Subscription** – Keep this box checked if you want to include the add-on item in the renewal subscription. Otherwise, clear this box to exclude the item from renewal.

Click the check icon on the top right corner to save the item settings.

4. Set up the pricing for the add-on item. To set the values for the first pricing interval, click anywhere on the pricing interval or click the ellipsis icon and select **Edit**. Then, specify values for the following fields:

- **Pricing Model** – Select one of the following:
  - **Tiered** – This pricing model is based on the incremental quantity sold. It is commonly used for recurring items. Tiered pricing charges a specified rate for all items sold in the tier (for example, the first 10 items). When the quantity sold exceeds the upper limit for the tier, NetSuite charges the price specified for the next tier for the additional items.
  - **Volume** – This pricing model is based on the aggregate quantity sold. It is commonly used for usage pricing. For volume pricing, the total quantity sold defines the charge rate for all items in the order.
- **Charge Frequency** and **Repeat Every** – For recurring and usage lines, set how often you want the charge to occur. You can set the values for these fields only on the first pricing interval.  
In the **Repeat Every** field, you can enter any positive integer from 1 up to the maximum value, depending on the value set for **Charge Frequency**:
  - If **Charge Frequency** is set to **Annually**, maximum value for **Repeat Every** field is 10.
  - If **Charge Frequency** is set to **Monthly** or **Weekly**, maximum value for **Repeat Every** field is 120.
- **Total Interval Value** – If you want to set the charge amount for the interval instead of using the price plan value, enter the charge amount in this field. This field is available only for recurring and one-time lines. You can set the value for this field only if the line status is Draft. In addition, for recurring lines, this field is editable only if the initial term for the subscription is not Evergreen.

Take note of the following when using the total interval value:

- When you set a total interval value and confirm that you want to use it instead of the price plan value, the price plan value will be cleared. When you save the subscription, the price plan value will be calculated based on the total interval value that you set.
- If you modify the price plan value after setting the total interval value, the total interval value will be cleared when you confirm that you want to use the price plan value. If total interval

value is not set, its value will be calculated based on the price plan value when you save the subscription.

- **Prorate By** – For recurring lines, select a proration option. You can set the value for this field only on the first pricing interval of a recurring line. The default setting is Prorate by Day. If the charge frequency is more than one month, you have the option to select Prorate by Day or Month.
- **Quantity** – For recurring or one-time lines, enter a quantity that is greater than zero. Initial value for an existing pricing interval is 1. However, if you make a copy of an existing pricing interval or add a new interval, the **Quantity** field on the new pricing interval is set to blank.
- **Included Quantity** – For usage lines, enter a value that is greater than zero for included quantity, if applicable.
- **Discount** – Both percentage and flat rate discounts are supported. To enter a percentage discount, include the percentage sign (%) after the positive number that you enter in the **Discount** field. To enter a flat rate discount, enter the numeric value only.
- **Recurring Amount** – For recurring lines, this field shows the recurring amount value based on the rate or fixed amount, quantity, and discount.
- Price tiers – Set up the price for each tier by specifying values for the following fields:
  - **Above Quantity** (required) – Default value is zero for the first tier. For succeeding tiers, the value you specify in this field indicates the upper limit for the previous tier.
  - **Pricing Option** (optional) – Select one of the following options:
    - **Rate** (default) – Calculates the item amount as quantity multiplied by rate.
    - **Fixed Amount** – The defined charge amount for the item is not affected by its quantity.
    - **Value** (required) – Enter an amount to charge for the item.
    - **Min Amount** (optional) – Enter the minimum amount limit for the tier.
    - **Max Amount** (optional) – Enter the maximum amount limit for the tier.

Click the plus (+) icon on the right side of the tiers to create a new tier.

Click the check icon on the top right corner of the pricing interval to save the pricing information.

If you want to create additional pricing intervals, click the ellipsis icon on the top right corner of an existing pricing interval and select Make Copy. You can then edit the copied pricing interval to change the pricing or discount as needed. You can also create a new pricing interval by clicking the plus (+) icon on the right side of the last pricing interval.

One time lines cannot have more than one pricing interval.

5. If you want to add more items, click the **Add Item** button and repeat Steps 3 through 4.
6. When you are done adding items, click **Save**.

## SuiteBilling Enhancements

SuiteBilling Enhancements is a SuiteApp developed by NetSuite to provide additional features that you can use in conjunction with the Advanced Subscription Billing features.

The following features are supported by this SuiteApp:

- Create usage records individually or in bulk using a RESTlet
- Perform bulk operations for deleting, voiding, or updating subscription related records using mass update
- Perform status changes or change orders for subscriptions or subscription lines in bulk

- View the summary and audit trail for bulk operations
- Perform bulk customer payments

Read the following topics for information about this SuiteApp:

- [Installing the SuiteBilling Enhancements SuiteApp](#)
- [Optimizing the Performance of the SuiteBilling Enhancement Script](#)
- [Creating Usage Records Using the RESTlet](#)
- [Subscription Billing Bulk Operations](#)
  - [Performing Subscription Billing Bulk Operations Using Mass Update](#)
  - [Processing Subscription Billing Bulk Changes Orders](#)
  - [Viewing the Bulk Operations Summary Page and Audit Trail Records](#)
- [Bulk Customer Payments](#)
  - [Permissions for Bulk Customer Payments](#)
  - [Setting the Default Account for Bulk Customer Payments](#)
  - [Setting the Payment Preferences for Billing Accounts](#)
  - [Creating Bulk Customer Payments](#)
  - [Viewing Transactions Processed in Bulk Customer Payments](#)

## Installing the SuiteBilling Enhancements SuiteApp

Before you can install the SuiteBilling Enhancements SuiteApp, make sure that the following features and preference are enabled in your NetSuite account.

- Enable the following features:
  - Billing Accounts
  - Billing Operations
  - Charge-Based Billing
  - Subscription Billing
  - Advanced Subscription Billing

To enable these features, go to Setup > Company > Enable Features. Click the **Transactions** subtab, and check the boxes for the features under the Billing section. For more information about SuiteBilling and related features, see the help topic [SuiteBilling](#).

- Enable the **Consolidate Projects on Sales Transactions** preference. To do this, go to Setup > Accounting > Accounting Preferences. Click the **Items/Transactions** subtab, and check the box for this preference under the Sales/Pricing section.

The SuiteBilling Enhancements SuiteApp is free, but the SuiteApp has to be shared with your NetSuite account before you can install it. Contact NetSuite Customer Support to request for access to this SuiteApp. When the SuiteApp is shared with your account, you can install it from the Enable Features page or from the Search & Install Bundles page.



**Note:** If the SuiteApp is not shared with your account, the **Install** button is not available on the SuiteApp Details or Bundle Details page.

### To install the SuiteApp from the Enable Features page:

1. Go to Setup > Company > Enable Features.

2. Click the **Transactions** subtab.
3. On the Billing section, click the **SuiteBilling Enhancements** link under Related SuiteApps.
4. On the SuiteApp Details page, click **Install**.

### To install the SuiteApp from the Search & Install Bundles page:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. In the **Keywords** field, enter **SuiteBilling Enhancements**.
3. Click **Search**.
4. From the search results, click the link for the bundle with the following details:
  - Name: **SuiteBilling Enhancements**
  - Bundle ID: **419588**
5. On the Bundle Details page, click **Install**.

The SuiteBilling Enhancements SuiteApp is a managed SuiteApp and is automatically updated whenever there are updates. Any fixes and enhancements will be available after the SuiteApp is updated in your production account.

For more information about installing a SuiteApp, see the help topic [Installing a Bundle](#).

## Optimizing the Performance of the SuiteBilling Enhancement Script

The SuiteBilling Enhancements SuiteApp uses a map/reduce script to process usage creation and bulk operation requests.

A map/reduce script type permits parallel processing, wherein multiple SuiteCloud Processors can work simultaneously to execute a single script deployment instance. You can control the number of processors used for each script instance by using the Concurrency Limit field on the script deployment record. You can also set the Priority Level to identify critical jobs that require more immediate processing. For more information, see the help topic [SuiteCloud Processors](#).

After installing the SuiteApp, you can change the default settings on the map/reduce script deployment record to optimize its performance. You can change the concurrency limit and priority level to maximize the use of available processors in your account and benefit from the parallel processing provided by the script.

### To optimize the map/reduce script:

1. Go to Customization > Scripting > Scripts.
2. On the page filters, set the **Type** to **Map/Reduce** to show only map/reduce scripts.
3. Look for the **sbe\_mr\_processor (customscript\_sbe\_mr\_processor)** script and click the **Deployment** link for it.
4. Click the **Edit** link for the deployment with ID: **customdeploy\_sbe\_mr\_processor**.
5. To optimize the performance of the script, you can change the values for the following fields:
  - **Priority** – By default, the priority for this script is set to **Standard**. If you want to mark this deployment as a critical job that requires more immediate processing, you can set the priority to **High**. For more information, see the help topic [SuiteCloud Processors Priority Levels](#).
  - **Concurrency Limit** – Set the number of processors that can be used to process the jobs associated with this script deployment. By default, the concurrency limit for this script deployment is set to **1**. For more information, see the help topic [Concurrency Limit](#).

For more information about the fields on the map/reduce script deployment record, see the help topic [Map/Reduce Script Deployment Record](#).

6. Click **Save**.

## Creating Usage Records Using the RESTlet

With the Advanced Subscription Billing feature, you can create usage data records for subscription items through the user interface or by CSV import. When the SuiteBilling Enhancements SuiteApp is installed in your account, you can also create usage data records using a RESTlet provided by the SuiteApp.

You can send a request to the usage data RESTlet in two ways:

- using required fields on the usage record
- using custom fields from the subscription or subscription line that are mapped to the usage record

The RESTlet supports creating usage data records individually or in bulk.

Read the following topics for more information about sending requests to the usage data RESTlet:

- [Usage RESTlet Request Headers](#)
- [Usage RESTlet Supported Methods](#)
- [Usage RESTlet Error Messages](#)

## Usage RESTlet Request Headers

When you send a request, you need to include the following request headers as part of the request.

Name	Value
Method	POST
URL	<RESTlet External URL>
<b>Headers</b>	
User-Agent-X	SuiteScript-Call
Content-Type	application/json
Authorization	NLAUTH nlauth_account= <b>SCOMPID</b> , nlauth_email= <b>USEREMAIL</b> , nlauth_signature= <b>USERPASSWORD</b> , nlauth_role=3

Perform the following procedure to get the value for the RESTlet external URL.

### To get the value for the RESTlet external URL:

1. Go to Customization > Scripting > Scripts.
2. Set the filters to view only RESTlet script types.
3. Look for the **sbe\_rs\_main** (customscript\_sbe\_rs\_main) script and click the **Deployments** link.
4. Click the **View** link for the **customdeploy\_sbe\_rs\_main** deployment record.
5. Copy the URL specified in the **External URL** field. Use this value for the URL in the request header.

## Usage RESTlet Supported Methods

The usage data RESTlet supports the following methods:

- `sbCreateUsage` – Creates usage records for subscription items in NetSuite.
- `sbGetUsageCreationStatus` – Returns the status of the request ID for usage data creation.

## sbCreateUsage

Use this method to send a request to create usage records for subscription items in NetSuite.

When the RESTlet receives a request using this method, it performs the following tasks:

- creates a SuiteBilling operation record
- runs or queues the SuiteBilling operation map/reduce script that will process the usage creation

Even if the usage creation process is not yet finished, the RESTlet also immediately returns the request ID in the response object. You can use the request ID to determine the status of the usage data creation request using the `sbGetUsageCreationStatus` method.

When the map/reduce script runs, it processes the SuiteBilling operation record created in the request. A SuiteBilling operation detail record is created for each usage object.

**Note:** Usage creation processing time increases when the number of usage objects in the request increases. For information about how to optimize the performance of the map/reduce script for usage creation, see [Optimizing the Performance of the SuiteBilling Enhancement Script](#).

### Request Properties

Property	Data Type	Required?	Description
method	string	Yes	<p>Method name of the process to execute.</p> <p>In this case, value must be <code>sbCreateUsage</code> to create usage records.</p>
usages	array	Yes	Array list of usage objects to create.
usages[x].subscriptionId	number	Required if <code>subscriptionName</code> , <code>sbLookup</code> , and <code>sbLineLookup</code> are not provided.	Internal ID of the subscription record that you are creating usage for.
usages[x].subscriptionName	string	Required if <code>subscriptionId</code> , <code>sbLookup</code> , and <code>sbLineLookup</code> are not provided.	<p>Name of the subscription record that you are creating usage for.</p> <p><b>Important:</b> If the subscription name that you provided is used for multiple subscriptions, an error will be returned.</p>
usages[x].sbLookup	object	Required if <code>subscriptionId</code> , <code>subscriptionName</code> , and <code>sbLineLookup</code> are not provided.	<p>Object containing the field ID and value which will be used for subscription lookup.</p> <ul style="list-style-type: none"> <li>■ <code>fieldId</code> - Field ID on the subscription record to be used for subscription lookup.</li> <li>■ <code>value</code> - Value of the field on the subscription record to be used for subscription lookup.</li> </ul>

Property	Data Type	Required?	Description
usages[x].line	number	Required if sbLineLookup is not provided.	Subscription line number that you want to create usage for.
usages[x].sbLineLookup	object	Required if subscriptionId, subscriptionName, and sbLookup are not provided.	Object containing the field ID and value which will be used for subscription line lookup. <ul style="list-style-type: none"><li>■ fieldId - Field ID on the subscription line record to be used for subscription line lookup.</li><li>■ value - Value of the field on the subscription line record to be used for subscription line lookup.</li></ul>
usages[x].quantity	number	Yes	Quantity of usage to be created.
usages[x].date	date	Yes	Date of usage to be created. Date format must follow the format specified in the account preference.
usages[x].memo	string	No	Notes that you want to include on the usage record.
usages[x].customFields	array	No	ArrayList of custom field objects with field ID - value pairs. The custom fields are set on the usage record. <ul style="list-style-type: none"><li>■ fieldId - Field ID on the usage record which will be set with the value provided.</li><li>■ value - Value to be set in the custom field on the usage record.</li></ul>

## Sample Request

```

1  {
2      "method": "sbCreateUsage",
3      "usages": [
4          {
5              "subscriptionId": "1",
6              "line": "3",
7              "quantity": "5",
8              "date": "1/3/2018",
9              "memo": "this is a note"
10         },
11         {
12             "subscriptionName": "Test Sub 001 - 1/1/2018",
13             "line": "1",
14             "quantity": "3",
15             "date": "1/4/2018"
16         },
17         {
18             "sbLookup": {
19                 "fieldId": "custrecord_sb_service_id",
20                 "value": "1001"
21             },
22             "line": "4",
23             "quantity": "10",
24             "date": "1/4/2018"
25         },
26         {
27             "sbLineLookup": {
28                 "fieldId": "custrecord_sb_line_service_id",
29                 "value": "1234"
30             },
31             "quantity": "10",
32             "date": "1/4/2018"
33         }
34     ]
35 }
```

```

29 }, {
30   "subscriptionName": "USD Free One Month Trial - 2/4/2018",
31   "line": "1",
32   "quantity": "5",
33   "date": "2/4/2018",
34   "customFields": [
35     {"fieldId": "custrecord_usage_source",
36      "value": "data"
37    }, {
38      "fieldId": "custrecord_usage_unit",
39      "value": "MB"
40    }
41  ]
42 }

```

## Response Properties

If the SuiteBilling operation record for the request is successfully created, the following property is returned.

Property	Data Type	Description
requestId	number	Internal ID of the SuiteBilling operation record. You can use this value to get the status of the usage creation.

## Sample Response

```

1 {
2   "requestId": 101
3 }

```

## sbGetUsageCreationStatus

Use this method to get the status and results of the usage creation request made using the [sbCreateUsage](#) method. Use the request ID returned by the [sbCreateUsage](#) method when you send a request using this method.

When the RESTlet receives a request using this method, it searches for the SuiteBilling operation record associated with the request ID. If an operation record is found, the method returns the usage creation status in the response object.

## Request Properties

Property	Data Type	Required?	Description
method	string	Yes	Method name of the process to execute. In this case, value must be sbGetUsageCreationStatus to check the status of the usage creation.
requestId	number	Yes	Internal ID of the SuiteBilling operation record. This value is returned by the sbCreateUsage method used for the usage creation request.

## Sample Request

```

1 {
2   "method": "sbGetUsageCreationStatus",
3   "requestId": "1101"
4 }

```

## Response Properties

Property	Data Type	Description
requestId	number	Internal ID of the SuiteBilling operation record.
status	string	<p>Status of the usage creation.</p> <p>Value can be one of the following:</p> <ul style="list-style-type: none"> <li>■ Not Started</li> <li>■ In Progress</li> <li>■ Completed</li> <li>■ Error</li> </ul>
result	object	<p>Result object that contains the information of successful records, failed records, and unhandled errors.</p>
result.successes	array	<p>Array list of usage objects that are successfully created.</p> <p>Each object contains the index, data, and result.</p> <ul style="list-style-type: none"> <li>■ index - Position or index of the usage object in the usage array.</li> <li>■ data - Usage object in the usage array</li> <li>■ result - Resulting object after processing the usage object. This property holds the internal ID of the created usage record.</li> </ul>
result.failures	array	<p>Array list of usage objects that failed.</p> <p>Each object contains index, data, and result.</p> <ul style="list-style-type: none"> <li>■ index - Position or index of the usage object in the usage array.</li> <li>■ data - Usage object in the usage array.</li> <li>■ result - Resulting object after processing the usage object. This property holds the error information that describes why a usage record is not created.</li> </ul>
result.errors	array	<p>Array list of error information that occurred on the different stages of the map/reduce script.</p> <p>These errors occurred outside the scope of usage creation (that is, outside of SuiteBilling Operation Detail record creation).</p> <ul style="list-style-type: none"> <li>■ stage - Stage in the map/reduce script where the error occurred.</li> <li>■ key - Key property of the context object. This value is usually the unique key processed in the map/reduce stages.</li> <li>■ name - Code or title of the error.</li> <li>■ message - Descriptive information about the error.</li> </ul>

### Sample Response

The following example shows the response when the operation record for the specified request ID is successfully obtained. In this example, the status of the usage creation is completed, one record is successfully created, one record failed, and there are no unhandled errors.

```

1  {
2    "requestId": "1101",
3    "status": "Completed",
4    "result": {
5      "successes": [
6        {

```

```

7     "index": 0,
8     "data": {
9         "subscription": "1",
10        "line": "3",
11        "quantity": "5",
12        "date": "1/3/2018",
13        "memo": "this is a note"
14    },
15    "result": {
16        "usageId": 101
17    }
18},
19],
20 "failures": [
21 {
22     "index": 1,
23     "data": {
24         "subscription": "1",
25         "line": "5",
26         "quantity": "15",
27         "date": "1/3/2018"
28     },
29     "result": {
30         "name": "INVALID_KEY_OR_REF",
31         "message": "Invalid usagesubscriptionline reference key Ems SP 001 - 1/1/2018: 5."
32     }
33 },
34 ],
35 "errors": []
36 }
37 }

```

In the following example, the status of the usage creation is completed and there is one unhandled error.

```

1 {
2     "requestId": "1102",
3     "status": "Completed",
4     "result": {
5         "successes": [],
6         "failures": [],
7         "errors": [
8             {
9                 "stage": "reduce",
10                "key": "906",
11                "name": "UNEXPECTED_ERROR",
12                "message": "An unexpected error occurred."
13            }
14        ]
15    }
16 }

```

## Usage RESTlet Error Messages

The following table shows the error messages that you can receive from the RESTlet.

Error Code	Error Message
MISSING_REQUEST_DATA	Request data is missing.
MISSING_REQUEST_PROPERTY	The {0} property is missing in the {1} object.
INVALID_REQUEST_METHOD	Request method is invalid: {0}
EMPTY_REQUEST_OBJECT	The {0} object is empty.
EMPTY_REQUEST_PROPERTY	The {0} property is empty.

Error Code	Error Message
INVALID_PROPERTY_FORMAT	The value for the {0} property has invalid format. Format must be: {1}.
SUBSCRIPTION_NOT_FOUND	Subscription record is not found using the {0} property.
SUBSCRIPTION_LINE_NOT_FOUND	Subscription Line record is not found using the {0} property.
REQUIRED_VALUE_NOT_FOUND	{0} is not found in the usage object.
MULTIPLE_VALUES_NOT_MATCH	Multiple values of {0} do not match.
FIELD_DOES_NOT_EXIST	The field {0} does not exist.
REQUEST_NOT_FOUND	Request {0} is not found using the {1} property
MULTIPLE_RECORDS_FOUND	Multiple records found for {0} using the {1} property.

## Subscription Billing Bulk Operations

SuiteBilling Enhancements SuiteApp enables you to perform bulk operations for subscription billing records.

The bulk operations feature provides a flexible way to clean up charge, usage, and change order records that are no longer needed in the system. You can also update specific fields on charge or change order records, and change the status of subscriptions or subscription lines in bulk. The changes performed in these bulk operations are tracked using audit trail records, which you can access on the Bulk Operations Summary page.

When installed, the SuiteApp enables you to do the following:

- Perform the following bulk operations using mass update:
  - **Delete Records** – Delete erroneous, obsolete, or irrelevant charge records.
  - **Void Records** – Void erroneous, obsolete, or irrelevant usage or change order records.
  - **Set Charge Stage to Non-Billable** – Change the value of the Stage field on charge records to Non-Billable.
  - **Update Change Order Effective Date** – Change the value of the Effective Date field on change order records.

For information about how to perform bulk operations using mass update, see [Performing Subscription Billing Bulk Operations Using Mass Update](#).

- Perform the following status changes through the Bulk Process Change Order page:
  - Draft to Pending Activation
  - Draft to Active
  - Pending Activation to Draft
  - Pending Activation to Active
  - Active to Suspend
  - Suspend to Reactivate

For information about how to process bulk change orders, see [Processing Subscription Billing Bulk Changes Orders](#).

- View a list of bulk operations performed and access audit trail records through the Bulk Operations Summary page. For more information, see [Viewing the Bulk Operations Summary Page and Audit Trail Records](#).

## Performing Subscription Billing Bulk Operations Using Mass Update

SuiteBilling Enhancements SuiteApp includes custom mass updates that you can use to perform bulk operations for charge, usage, and change order records. Supported bulk operations include:

- Deleting charge records
- Voiding usage or change order records
- Setting the charge stage to Non-Billable for charge records
- Updating effective date on change order records

Only roles with access to charge, subscription change order, and usage records have access to the mass update actions for bulk operations.

Each bulk operation run creates a Bulk Operations Audit Trail record, which contains information about the mass update. You can view the list of bulk operations performed and access the audit trail records from the Bulk Operations Summary page. For more information, see [Viewing the Bulk Operations Summary Page and Audit Trail Records](#).

### To update, void, or delete subscription billing records using mass update:

1. Go to Lists > Mass Update > Mass Updates.
2. On the Mass Updates list, click **Custom Updates** to expand.
3. Select the bulk operation that you want to perform.

The following table shows the bulk operations that you can perform for supported subscription billing records.

Subscription Billing Record	Bulk Operation (Mass Update Action)	Description
Charge	Delete Records	Delete erroneous or obsolete charge records
	Set Charge Stage to Non-Billable	Change the value of the <b>Stage</b> field on charge records to Non-Billable
Subscription Change Order	Void Records	Void erroneous or obsolete change order records
	Update Change Order Effective Date	Change the value of the <b>Effective Date</b> field on change order records
Usage	Void Records	Void erroneous or obsolete usage records

4. On the Mass Update page:
  1. If you want to save this mass update, enter a name in the **Title of Action** field.
  2. In the **Job Name** field, enter a unique name to help you identify this bulk operation run. Default value for this field is the date and time when the Mass Update page is loaded.
  3. If you selected the **Update Change Order Effective Date** action, enter the new effective date for the change orders in the **Effective Date** field.
  4. On the **Criteria** subtab, select the filters that you want to use to set the criteria fields for the records that you want to process.
  5. If necessary, edit or set the values on the **Results**, **Audience**, and **Schedule** subtabs.
  6. Click **Preview** to preview the list of records that will be processed based on the filters you set on the **Criteria** subtab.

On the Mass Update Preview Results page, you can do the following:

- In the **Apply** column, keep the box checked for records that you want to include in the mass update. Clear the box if you want to exclude a specific record from the mass update.
- Click **Return to Criteria** if you want to make further changes to the filters that you previously set.
- Click **Perform Update** to run the mass update action for the selected records.
- Click **Save** to save the mass update without performing any changes.

**Note:** If you checked the **Run Update According to Schedule** and specified a schedule on the **Schedule** subtab, the mass update will run according to the schedule after you save it.

- If you do not want to continue with this mass update, click **Cancel** to return to the Mass Updates category list.

## Processing Subscription Billing Bulk Changes Orders

SuiteBilling Enhancements SuiteApp includes support for processing bulk change orders for subscriptions and subscription lines.



**Important:** Make sure the roles in your account are set up with the appropriate permissions to process bulk change orders and customize filters and columns on the Bulk Process Change Order page. For more information, see [Permissions for Bulk Process Change Order](#).

On the Bulk Process Change Order page, you can do the following:

- **Search for Records to Process** – You can search for subscriptions or subscription lines using predefined filters such as customer, billing account, subscription plan, start date, and end date.
- **Customize Search Filters and Sublist Columns** – You can customize the filters that you can use to search for records. You can also customize the columns that you want to include in the record sublist for the search results.
- **Specify the Status Change and Change Order Details** – You can change the status from Draft to Pending Activation, or inversely. You can also apply activation, suspend, or reactivation change order by selecting the associated status change. For change orders, you must also specify the effective date, requester, and modification type. For activation change order, you have the option to request for off-cycle invoice for advanced charges.
- **Process Multiple Records for Bulk Change Order** – After searching for records, you can select multiple subscriptions or subscription lines to process for bulk change orders.

Each bulk operation run creates a Bulk Operations Audit Trail record, which contains information about the change order. You can view the list of bulk operations performed and access the audit trail records from the Bulk Operations Summary page. For more information, see [Viewing the Bulk Operations Summary Page and Audit Trail Records](#).

### To process bulk change orders for subscriptions or subscription lines:

1. Go to Transactions > Subscriptions > Process Bulk Change Orders.
2. On the Bulk Process Change Order page, under the Primary Information section:
  - a. In the **Records to Process** field, select whether you want to search for and apply change orders to **Subscription** records or **Subscription Lines**.
  - b. In the **Status Change** field, select the status change that you want to apply:

- Draft to Pending Activation
  - Draft to Active
  - Pending Activation to Draft
  - Pending Activation to Active
  - Active to Suspend
  - Suspend to Reactivate
- c. For status changes related to activation, suspend, or reactivate change order, you must also specify values for the following fields:
- **Effective Date** – Select the date when the change order takes effect.
  - **Request Off-Cycle Invoice for Advanced Charges** – Check this box to set the default for off-cycle invoices, which is inherited from other records. An off-cycle invoice bills for subscriptions with a partial period. For example, sending a bill before the recurring scheduled bills. This option applies only to activation change order.
  - **Requester** – Select the name of the employee requesting the change order. This field shows employees who have Create, Edit, or Full permission for subscription change order records. Administrators are excluded.
  - **Modification Type** – Specify how the change order impacts subscription recurring revenue analytics.
    - New or Churn** - Analytics revenue impact of the change order is classified as New or Churn.
    - Upsell or Downsell** - Analytics revenue impact of the change order is classified as Upsell or Downsell.
    - Ignored** - The change order has no analytics revenue impact.
  - **Memo** (optional) – Use this field to enter notes.
3. In the Filters section, select at least one filter to use for searching records. The following filters are available:
- **Customer** – When you select a customer, the default billing account associated with the customer is automatically selected in the **Billing Account** field.
  - **Billing Account** – If you selected a customer, this field is automatically set to the default billing account of the customer. The list is also filtered to show only billing accounts associated with the customer.
- If a customer is not yet selected, when you select a billing account, the customer associated with the billing account is automatically selected in the **Customer** field.
- **Subscription Plan** – To filter by subscription plan, select a subscription plan in this field. The list shows all subscription plans in the account.
  - **Start Date** – To filter by start date, select a date in this field. This date must be earlier than the end date (if specified).
  - **End Date** – To filter by end date, select a date in this field. This date must be later than the start date (if specified).



**Note:** You can customize the filters that you want to use to search for records. For more information, see [Customizing the Search Filters and Sublist Columns for Bulk Process Change Order](#).

If you have added custom filters before, the fields are available in the Additional Filters section of the Bulk Process Change Order page.

4. Click **Search**.

5. The search results returned are shown in the record sublist. From this list, select the records that you want to process. All records are selected by default. If the results are shown in multiple pages, click the page navigation buttons to go through the pages.



**Note:** The number of rows for the record sublist is based on the value set in the **Number of Rows in List Segments** user preference. For information about this preference, see Optimizing User Preferences.

By default, the records in the list are sorted by the last column on the right, in ascending order. You can change the sorting by clicking any of the column headers, but only the records on the current page will be sorted.

- To remove the current selection, click **Unmark All**. This action clears the **Include** box for any selected records across all pages.
- To individually select records, check the box in the **Include** column for each record that you want to include. Clear the box for records that you want to exclude.
- To select all records in the list, click **Mark All**. This action checks the **Include** box for all lines in the list, across all pages.

If you modified a search filter after running an initial search, be sure to click the **Search** button again to update the results in the record sublist. Then, you can select records to include again from the updated results.

6. When you have finished selecting records, click **Process Bulk Change Order**.

When you submit a bulk change order request, a corresponding SuiteBilling Operation record is generated and the map/reduce script that will process the request runs or is queued. After clicking the Process Bulk Change Order button, a confirmation banner with a link to the generated SuiteBilling Operation record appears at the top of the Bulk Process Change Order page. Click the link to view the status of the bulk change order request.

**Note:** For information about how to optimize the performance of the map/reduce script for bulk operations, see [Optimizing the Performance of the SuiteBilling Enhancement Script](#).

You can also view the audit trail record for the bulk operation run on the Bulk Operation Summary page. For more information, see [Viewing the Bulk Operations Summary Page and Audit Trail Records](#).

## Permissions for Bulk Process Change Order

SuiteBilling Enhancements SuiteApp provides a Bulk Process Change Order page. You need to have the appropriate permissions to be able to process bulk change orders and customize the filters and columns on this page.

The following permissions are required for any role (except an Administrator) who will perform bulk change orders:

Subtab	Permission	Level	Notes
Lists	Billing Schedules	View	For additional filters
	Classes	View	For additional filters
	Currency	View	For additional filters

Subtab	Permission	Level	Notes
			 <b>Note:</b> This permission is not available on single currency accounts.
	Custom Record Entries	Full	For processing change orders
	Customers	View	For filters
	Departments	View	For additional filters
	Documents and Files	View	For processing change orders
	Items	View	For additional filters
	Locations	View	For additional filters
	Price Books	View	For additional filters
	Price Plans	View	For additional filters
	Subscription Change Orders	Full	For processing change orders
	Subscription Plans	View	For filters
	Subscriptions	Full	For processing change orders
	Subsidiaries	View	For additional filters
Setup	Accounting Lists	View	For additional filters
	SuiteScript	View	For processing change orders
	SuiteScript Scheduling	Full	For processing change orders
Custom Record	SBE Bulk Change Orders Column	Full	For customizing additional columns
	SBE Bulk Change Orders Filter	Full	For customizing additional filters

## Customizing the Search Filters and Sublist Columns for Bulk Process Change Order

With the SuiteBilling Enhancements SuiteApp, you can customize the search filters that you want to use on the Bulk Process Change Order page. You can also customize the columns that you want to include in the record sublist for the search results.

When you run a search that returns at least one record, a **Customize** button appears on the record sublist. Click this button to open the page where you can select additional filters and columns.



**Important:** Using a select type custom field as an additional filter will not work if it is dependent on another field. For example, a custom field is an Employee list and has a filter of Employee's Subsidiary = Subscription's Subsidiary. When you add the custom field as an additional filter, no options will be shown in that field because it is dependent on a field that does not exist on the Bulk Process Change Order page.

### To customize the search filters and sublist columns:

1. Run a subscription or subscription line record search on the Bulk Process Change Order page. For more information, see [Processing Subscription Billing Bulk Changes Orders](#).
2. When the search results are returned, click the **Customize** button on the record sublist.



**Note:** The **Customize** button is available only if the search returned at least one record.

3. On the Customize Sublist page, the following subtabs are available:
  - **Additional Columns** – This subtab shows the list of fields available to the record type used in the search. To include a field as a column in the sublist for search results, check the **Include** box for the field. The default columns that should always be included in the sublist remain dimmed.
  - **Additional Filters** – This subtab shows the list of fields available to the subscription record, regardless of the record type used in the search. To include a field as an additional search filter on the page, check the **Include** box for the field. The primary filters that are already available on the page remain dimmed.
4. When you have finished selecting additional columns and filters, click **Save**.

On the Bulk Process Change Order page, the custom filters that you included are shown in the Additional Filters section. When you run a search, the additional columns are listed after the default columns in the sublist.

## Viewing the Bulk Operations Summary Page and Audit Trail Records

SuiteBilling Enhancements SuiteApp includes a Bulk Operations Summary page, which can help you keep track of bulk operations that were performed in the account. To view the Bulk Operations Summary page, go to Transactions > Subscriptions > Bulk Operations Summary.

You can view the following information about the Bulk Operations Summary page.

Bulk Operations Summary Column	Description
Job Name	<p>Shows the job name for the bulk operation run.</p> <p>For bulk operations performed using mass update, this field shows the job name specified on the Mass Update page for this bulk operation run.</p> <p>For bulk change orders, this field shows Generate Bulk Change Order and ID of the related SuiteBilling Operation record.</p>
Bulk Operation Type	<p>Shows the type of action performed in the bulk operation run:</p> <ul style="list-style-type: none"> <li>■ Set Charge Stage to Non-Billable</li> <li>■ Update Change Order Effective Date</li> <li>■ Delete Records</li> <li>■ Void Records</li> <li>■ Draft to Pending Activation</li> <li>■ Draft to Active</li> <li>■ Pending Activation to Draft</li> <li>■ Pending Activation to Active</li> <li>■ Active to Suspend</li> <li>■ Suspend to Reactivate</li> </ul>

Bulk Operations Summary Column	Description
	<p><b>Note:</b> Starting version 21.2, Delete Records is changed to Void Records for usage and change order records. This change is applied only to new bulk operation runs performed after the upgrade to version 21.2. Audit trails showing Delete Records actions for usage and change order records prior to version 21.2 will be unchanged.</p>
Record Type	Shows the type of record processed in the bulk operation run.
Created By	Shows the name of the person who performed the bulk operation run.
Created Date	Shows the date and time of the bulk operation run.
Records Processed	<p>Shows the number of records successfully processed (X) out of the total number of records included in the bulk operation run (Y). This value is shown in the format X/Y.</p> <p>The total number of records (Y) shows all records that were selected to be included in the bulk operation request.</p> <p>Based on the total number of records, the number of records successfully processed (X) shows all records that did not encounter errors during the bulk operation run, regardless if the record was updated or not.</p> <p>The difference between the two values indicate the number of records that encountered errors.</p>

From the Bulk Operations Summary page, you can click the link in the **Job Name** column to access the Bulk Operations Audit Trail record for that specific run.

The same information from the Bulk Operations Summary page are shown in the header section and on the **Job Info** subtab of the Bulk Operation Audit Trail record.

On the **Records** subtab, you can see more details about each record included in the bulk operation run. By default, the list of records under the **Audit Trail** subtab is sorted by record ID in ascending order. Use the following options to change the way the records are sorted:

- **Sort By** – Select which field you want the results sorted by. The available values in this field differ depending on the bulk operation type.
- Note:** You can also sort the list by clicking the column header on the **Audit Trail** subtab. However, doing so will sort only the records listed on the current page. Use the **Sort By** field to sort all records that are part of the bulk operation run.
- **Descending** – Check this box to sort the list by descending order. Clear this box to sort the list by ascending order.
  - **Page** – Select the results page that you want to view. The page labels depend on the current sorting of the audit trail records. Each page displays 25 records.
  - **Show Failures Only** – Check this box to show only failed records.

The columns on the **Audit Trail** subtab also differ depending on the bulk operation type.

Bulk Operation Type	Columns
<ul style="list-style-type: none"> <li>■ Delete Records</li> <li>■ Void Records</li> </ul>	<ul style="list-style-type: none"> <li>■ View</li> <li>■ Record ID</li> <li>■ Status</li> </ul>

Bulk Operation Type	Columns
	<ul style="list-style-type: none"> <li>■ Error Message</li> </ul>
■ Set Charge Stage to Non-Billable	■ View
■ Update Change Order Effective Date	■ Record ID
■ Draft to Pending Activation	■ Old Value
■ Draft to Active	■ New Value
■ Pending Activation to Draft	■ Status
■ Pending Activation to Active	■ Error Message
■ Active to Suspend	
■ Suspend to Reactivate	

You can click the link (if available) in the View column to view a specific record.

## Bulk Customer Payments

When the SuiteBilling Enhancements SuiteApp is installed in your NetSuite account, you can accept customer payments in bulk. The bulk customer payments feature enables you to generate payments for one or more customers and apply the payments to the appropriate invoices.

Before using the bulk customer payments feature, make sure the roles in your NetSuite account are set up with appropriate permissions. For more information, see [Permissions for Bulk Customer Payments](#).

Read the following help topics for information about the capabilities provided by this feature:

- [Setting the Default Account for Bulk Customer Payments](#) – Specify the default payment account that will be set on generated payments.
- [Setting the Payment Preferences for Billing Accounts](#) – Set the payment preferences for billing accounts.
- [Creating Bulk Customer Payments](#) – Create bulk customer payments where you can set the invoice search criteria, bulk payments run schedule, payment processing options, and accounting options for the bulk payments run.
- [Viewing Transactions Processed in Bulk Customer Payments](#) – Keep track of the processed invoices and generated payments for each bulk payments run.

## Permissions for Bulk Customer Payments

You need to have the appropriate permissions to be able to process bulk customer payments and access related records.

For information about the minimum permissions required to use bulk customer payments provided by the SuiteBilling Enhancements SuiteApp, see [Basic Permissions for Bulk Customer Payments](#).

For information about the additional setup tasks when the Payment Instruments feature is enabled, see [Setting Up Bulk Customer Payments with Payment Instruments Feature Enabled](#).

## Basic Permissions for Bulk Customer Payments

The following table shows the required permissions for any role (except an Administrator) who will perform bulk customer payments.

For information about reviewing and setting permissions, see the help topics [Reviewing Permissions Assigned to Roles](#) and [Setting Permissions](#).

Subtab	Name	Level	Description
Transaction	Customer Payment	Edit	Enables customer payment creation.
Reports	Account Receivable	View	Enables access to accounts receivable report.
Custom Record	Bulk Customer Payments	Full	Enables bulk customer payments record creation and access to bulk customer payments menu. <ul style="list-style-type: none"><li>■ In the Classic Center, you can access the menu through Transactions &gt; Bulk Customer Payments.</li><li>■ In the Accounting Center, you can access the menu through Financial &gt; Other Transactions &gt; Bulk Customer Payments.</li></ul>
	Bulk Payments Run	Full	Required to run bulk customer payments.

## Setting Up Bulk Customer Payments with Payment Instruments Feature Enabled

By default, the following SuiteBilling Enhancements script deployments, which need access to payment card data, are set to execute using the administrator role:

- SBE Payment UE Load Credit Cards List (ID: customdeploy\_sbe\_pay\_ue\_loadcclist)
- SBE Payment UE Validate Credit Card (ID: customdeploy\_sbe\_pay\_ue\_validate\_cc)
- SBE Pay SL Bulk Payments Service (ID: customdeploy\_sbe\_pay\_sl\_bulkpaymentssvc)

However, as a best practice, you should consider changing this setting to any role that has minimum access permissions instead.

To change the execute as role setting, go to Customization > Scripting > Script Deployments. Edit the script deployment. Then, set the **Execute as Role** field to any role that has the following permissions:

Subtab	Name	Level	Description
Lists	Payment Card	Full	Required if you use payment cards for payments.
	Payment Card Token	Full	Required if you use payment card tokens for payments.
	Payment Instrument	Full	Required if you use payment instruments for payments.

**i Note:** These permissions are available only if the Payment Instruments feature is enabled in your account. If this feature is disabled, you will not be able to assign these permissions to custom roles. In this case, you can set the **Execute as Role** to any standard role that has access payment card data (for example, A/R Clerk).

For more information, see the help topic [Payment Instruments](#).

## Setting the Default Account for Bulk Customer Payments

With the SuiteBilling Enhancements SuiteApp, you can set the default payment account for bulk customer payments on the General Preferences page. You can select the bank account where the payments are deposited, or you can opt to record the payments as undeposited funds. This preference sets the value in the Account field on payment records generated for bulk customer payments.

**To set the default payment account for bulk customer payments:**

1. Go to Setup > Company > General Preferences.
2. Click the **Custom Preferences** subtab.
3. To set the default account for bulk customer payments, use the following preferences under SuiteBilling Enhancements Feature:
  - **Default Payment Account** – If the payments are deposited to a bank account, select the bank account in this field.
  - **Record Payments as Undeposited Funds** – If the payments will be deposited to a bank account later, check this box.

If you leave both preferences blank, the system will use the account set in the **Default Payment Account** field on the Accounting Preferences page.

If you set both preferences, the payments will be recorded as undeposited funds by default.

4. Click **Save**.

## Setting the Payment Preferences for Billing Accounts

With the SuiteBilling Enhancements SuiteApp, you can set the payment processing profile and payment instrument that will be used to process payment transactions for a billing account. These fields are available on billing account records only if the Credit Card Payments feature is enabled.

The SuiteApp determines the payment processing profile and payment instrument that will be used for customer payments based on the following hierarchy:

### Payment Processing Profile

1. Value in the Payment Processing Profile field on the bulk customer payments record
2. Value in the Payment Processing Profile field on the billing account record
3. Value in the Pref. CC Processor field on the customer record
4. System default (which is the first payment processing profile in the record list)

### Payment Instrument

1. Value in the Payment Instrument field on the billing account record
2. Default payment instrument on the customer record

### To set the payment processing profile and payment instrument for billing accounts:

1. Go to Lists > Relationships > Billing Accounts.
2. Click the Edit link for the billing account.
3. Under SuiteBilling Enhancements, select a value for the following fields:
  - **Payment Processing Profile** – Select the payment processing profile that you want to use when processing payment transactions for this billing account. Options include all payment processing profiles set up in the account.
  - **Payment Instrument** – Select the payment instrument that you want to use when processing payment transactions for this billing account. When the Payment Instruments feature is enabled, options include all payment instruments associated with the selected customer. When the Payment Instruments feature is disabled, options include credit cards only. For information about payment instruments, see the help topic [Payment Instruments](#).
4. Click **Save**.

## Creating Bulk Customer Payments



**Important:** Make sure the roles in your account are set up with the appropriate permissions to use bulk customer payments. For more information, see [Permissions for Bulk Customer Payments](#).

With the SuiteBilling Enhancements SuiteApp, you can set up bulk payments by creating a bulk customer payments (BCP) record. On this record, you can do the following:

- Set the invoice filters.
- Set a recurring schedule for bulk payments.
- Specify the payment processing profile that will be used to process transactions in the bulk payments run.
- Set payment options for transactions included in the bulk payments run.

When the SuiteApp processes a BCP record, it searches for invoices that match the criteria specified and generates payments for all applicable invoices.

A bulk payments run (BPR) record logs the results of each BCP process run. This record includes a list of processed invoices and generated payments. You can view the list of generated BPRs on the **Bulk Payments Run** subtab of the BCP record. You can also view a list of all BPR records by going to Transactions > Bulk Customer Payments > View Bulk Payments Run. For more information, see [Viewing Transactions Processed in Bulk Customer Payments](#)

### To create bulk customer payments:

1. Go to Transactions > Bulk Customer Payments > View Bulk Customer Payments > New.
2. In the **Name** field, enter a name for the bulk customer payments record.
3. Set the date criteria for the invoice search using the following fields:
  - **Offset Days From Current Date** – BCP returns all invoices until the current date unless an offset value is specified in this field. The offset is applied to the current date to adjust the invoice end date filter. The default offset value is zero, which indicates the current date. You can enter any positive or negative integer.  
When you use offset, customer invoices are filtered using the following formula for date range:
    - Start Date = January 1, 1900
    - End date = current date + offset days
 For example, if offset value is -2 and the current date is January 1, 2022, then the search will include customer invoices from January 1, 1900 through December 30, 2021.
  - **Use Date Range** – If you want to set a specific date range for the invoice search, check this box. Use the **From** and **To** fields to set the date range. If both date fields are blank, all open invoices for the customer will be searched.
  - **Filter Invoices By Date Type** – Select whether the invoices are searched by transaction date or by due date.
4. Specify when you want to run the bulk payments.
  - If you want to create a one-time bulk payments run, keep the **Recurring** box cleared. Bulk payments will be processed after saving the record.
  - If you want to set up a recurring schedule for bulk payments, check the **Recurring** box and set the values in the following fields:

- **Frequency** and **Repeat Every** – Use these fields to set how often the bulk payments will be processed.

For example, if you want to process bulk payments every 2 weeks, set the following:

- Frequency = Week (unit of time)
- Repeat Every = 2 (interval)

- **Start Date** – Specify the start date for the recurring bulk payments schedule.

If the specified date is earlier than the current date, the bulk payments will be processed immediately upon saving.

- **Start Time** – Specify the start time for recurring bulk payments schedule.

Take note of the following:

- If you are editing or viewing a bulk payments record that has been processed, the **Last Run Date** field shows date and time of the most recent bulk payments run.
- If you do not want the system to process this bulk payments record, you can check the **Inactive** box to deactivate it.

#### 5. Specify the customer for which you want to process bulk payments.

- **Customers** – If you want the search to include invoices for specific customers only, select a value in this field. You can select a customer, a static customer group, or a dynamic group based on a customer saved search.



**Note:** For dynamic customer groups, you must set the saved search to Public and use standard search filters to define the search criteria. Using filter expressions is currently not supported.

- **All Customers** – If you want the search to include invoices for all customers, check this box.

#### 6. In **Payment Processing Profile**, select the payment processing profile that you want to use to process payment transactions. You can set this field only if the Credit Card Payments feature is enabled in your account.

If this field is blank, the system will use the payment processing profile specified on the billing account record, customer record, or the system default. For information about the payment processing profile hierarchy, see [Setting the Payment Preferences for Billing Accounts](#).

#### 7. Set the accounting options using the following fields:

- **Record Payment As** – Credit card is the default payment method. If you want to use a non-credit card payment method, select from the options in this field. The list is sourced from the Payment Method accounting list and includes only non-credit card payment methods.

When this field is set, other fields related to credit card payments are dimmed.

This field is required when the Credit Card Payments feature is disabled in your account.

The following fields are editable only if the payment type is credit card.

- If the Payment Instruments feature is enabled in your account, you can set the following fields.

- **Handling Mode** – Select the handling mode for the generated customer payments.

- **Process** – Triggers payment processing through a payment gateway with the selected payment option and payment processing profile.

- **Record External Event** – Creates a NetSuite record of a payment that took place outside of NetSuite, for example, in an ecommerce solution that authorizes payments outside of NetSuite.

- **Save Only** – Saves the data entered on the form but does not trigger payment process.

- To exclude invoices that use specific payment instruments, check the appropriate box:

- **Exclude General Tokens**
- **Exclude Payment Cards**
- **Exclude Payment Card Tokens**

For more information about the Payment Instruments feature, see the help topic [Payment Instruments](#).

- If the Payment Instruments feature is disabled in your account, you can use the following fields to specify how to handle credit card payments:
  - If you want to trigger payment processing upon creation of the customer payment record, check the **Charge Credit Card** box.
  - If you want to record external payments, check the **Mark CC Approved** box. This option checks the **CC Approved** box on the generated customer payment, which indicates that the payment took place outside of NetSuite.
  - If you want to save the data entered on the payment transaction, leave both the **Charge Credit Card** and **Mark CC Approved** boxes cleared.

8. When you have finished, click **Save**.

To view the bulk payments run information and processed transactions, see [Viewing Transactions Processed in Bulk Customer Payments](#).

## Viewing Transactions Processed in Bulk Customer Payments

To help you keep track of processed transactions for bulk payments, a bulk payments run (BPR) record is generated each time a bulk customer payments (BCP) record is processed by the SuiteBilling Enhancements SuiteApp.

The BPR record shows the following information for each run:

- Bulk payment details sourced from the BCP record
- Date and time when the bulk payments are processed
- Status of the bulk payments run
- List of successful invoices, failed invoices, and generated payments

You can view the list of generated BPRs on the **Bulk Payments Run** subtab of the BCP record. You can also view a list of all BPR records from Transactions > Bulk Customer Payments > View Bulk Payments Run.

In addition, a **SuiteBilling Enhancements** subtab is available on invoice and payment records.

- On processed invoices, this subtab contains links to the generated payment and BPR record. If a payment was not generated, you can also see the payment failure reason on this subtab.
- On generated payments, this subtab contains links to the invoice where the payment is applied and BPR record.