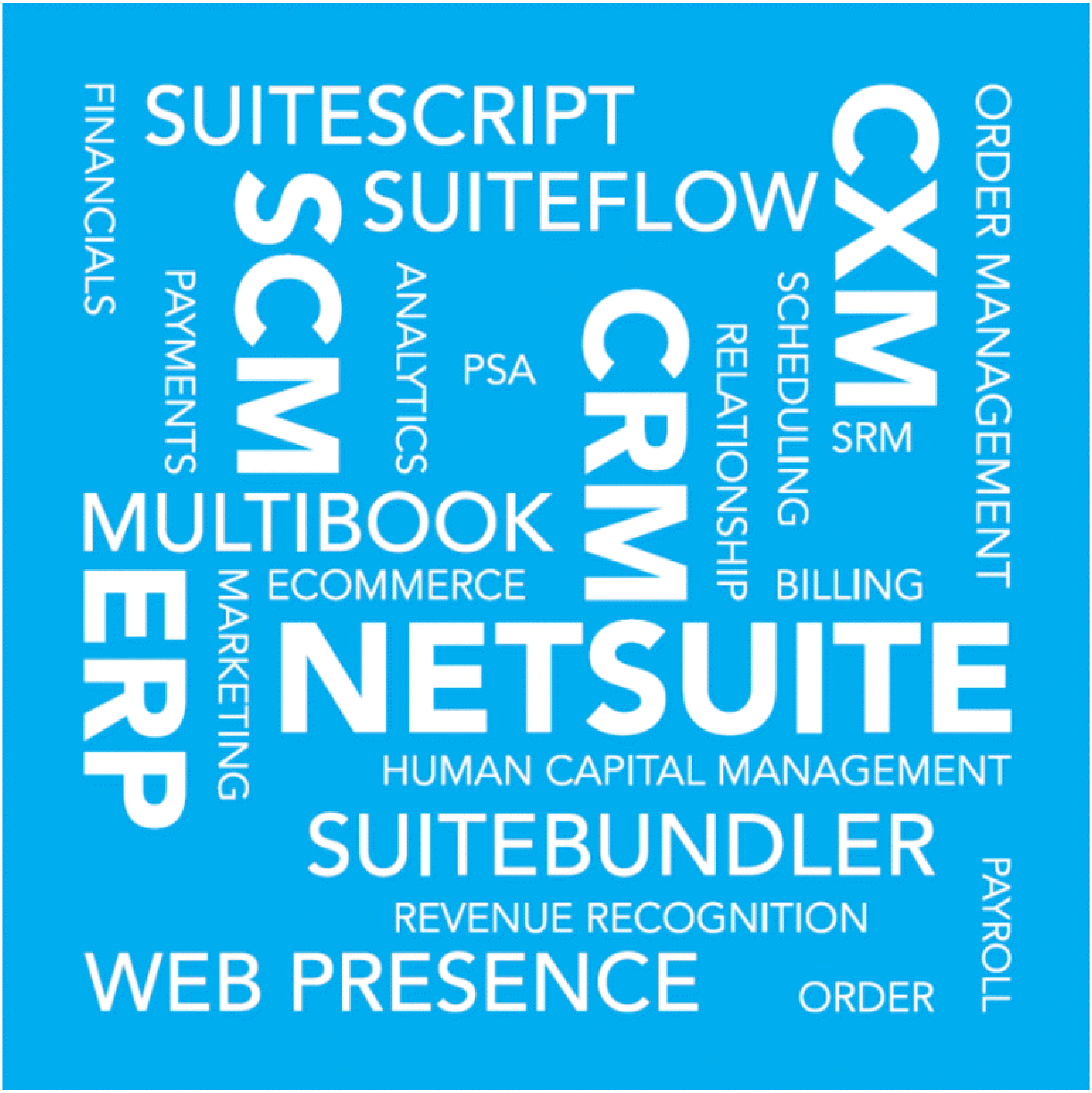
Recurring Billing



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Recurring Billing

Recurring Billing Overview

The NetSuite Recurring Billing SuiteApp manages your business' pricing and rating strategies and automates your company's billing and invoicing processes. The solution supports businesses that sell recurring and usage-based products and services in a brick and mortar or online operations.

Recurring Billing is provided as a SuiteApp developed by NetSuite. Contact your NetSuite account manager to purchase the Recurring Billing SuiteApp and to have the bundles shared with your account so that you can install it.

The Recurring Billing SuiteApp enables you to do the following:

- Define an item as a recurring service or a product that will be delivered to a customer through a subscription. See Setting Up Subscription Items.
- Create billing plans and charge plans as templates to set up subscription plans and subscription plan items. See Setting Up Billing Plans and Setting Up Charge Plans.
- Set up rate plans to define the charging structure of subscription plan items. See Setting Up Rate Plans.
- Set up subscription plans and subscription plan items that will be used to create customer subscriptions. See Setting Up Subscription Plans.
- Create subscriptions by entering a subscription sales order and adding subscription items to define the services that are sold to a customer. You can also create a subscription opportunity or estimate during negotiations, which you can later convert to a subscription sales order when the order is accepted by the customer. See Creating Subscriptions.
- Import recurring billing data including usage data, which is used as basis for computing charges for usage-based items. See Importing Recurring Billing Data.

Recurring Billing automates the generation of subscriptions through a workflow that manages the subscription states. For more information, see Subscriptions.

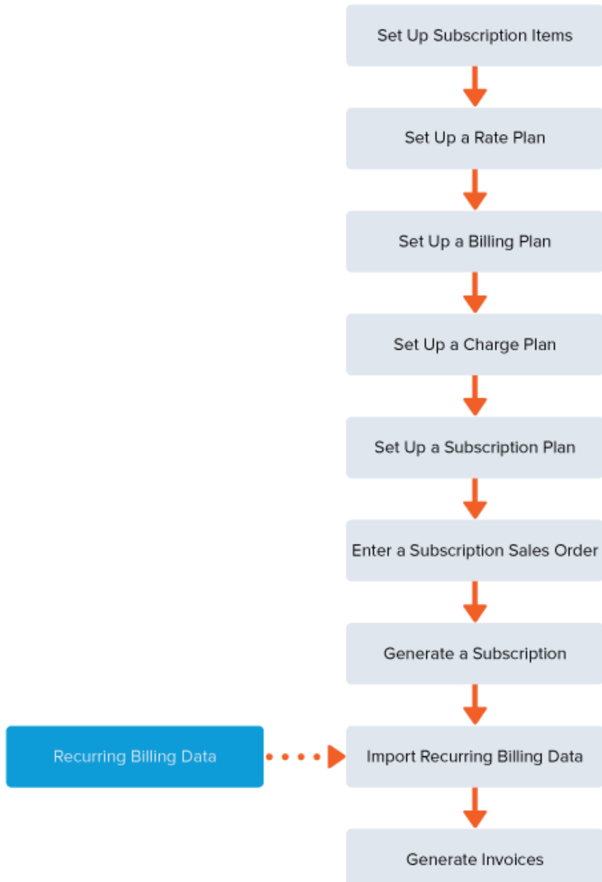
This SuiteApp also includes support for the following features:

- Recurring, usage (fixed and variable), and termination fee billing
- Terms and renewals
- Proration (on sale and on termination)
- Usage data filtering
- Billing methods (arrears and advance)
- Invoice aging
- Fixed date and anniversary type billing runs
- Billing console to manage fixed date billing runs
- Revenue Recognition
- Sales order in-line discounting
- Per item taxation
- Reporting and analytics
- Invoice templates
- Pro forma invoicing
- Usage sibling aggregation
- Usage historical pricing

For information about installing and setting up the Recurring Billing SuiteApp, see Setting Up Recurring Billing.

Billing Process

The following diagram illustrates a sample high-level billing process as implemented in the NetSuite Recurring Billing SuiteApp:



The following table summarizes the steps involved in each phase of the sample billing process illustrated in the preceding diagram.

1 Set up Subscription Item	Check the **Requires Subscription Plan** box to indicate if an item is billed as part of a subscription plan. **Note:** Items that do not have the **Requires Subscription Plan** box checked can still be used as line items in a subscription transaction. However, when this box is checked, you need to select a subscription plan for the item when you enter it as a transaction line item. For more information, see Setting Up Subscription Items.
2 Set up a Rate Plan	Create a rate plan that can be used as a template for the pricing components of a subscription plan. The Rate Plan describes the rating model, rating units, usage rating filters, display filters, historical data range, and pricing of a subscription plan, including tiers and thresholds. For more information, see Setting Up Rate Plans.
3 Set up a Billing Plan	Create a billing plan that can be used as a template for the billing term, billing mode, termination method, and renewal components of a subscription plan. For more information, see Setting Up Billing Plans.
4 Set up a Charge Plan	Create a charge plan that can be used as a template for the components of a subscription plan item related to how an individual charge is calculated. A charge plan describes the charge type, billing method, and options for proration, line discounting, item uplift, and custom rate for a subscription plan item. For more information, see Setting Up Charge Plans.

5 Set up a Subscription Plan	The subscription plan defines the billing terms and availability of the products or services being sold. For each subscription plan, you have to define a lead item or a product line, add subscription plan items, and define how the charges are levied for each item. For more information, see Setting Up Subscription Plans.
6 Enter a Subscription Sales Order	Create a subscription sales order for each sales transaction of recurring items. You can also add an item to an existing subscription by creating a sales order and associating the transaction with the subscription. You can also create a subscription opportunity or estimate during negotiations, which you can later convert to a subscription sales order when the order is accepted by the customer. For more information, see the following help topics: ▪ Creating Subscriptions ▪ Entering a Subscription Opportunity ▪ Entering a Subscription Estimate ▪ Entering a Subscription Sales Order
7 Generate a Subscription	A subscription record is automatically generated after a subscription sales order is approved. For more information, see Subscription Creation and Subscriptions.
8 Import Recurring Billing Data	You can transfer recurring billing data in CSV format from other applications into NetSuite using the Import Assistant. For more information, see Importing Recurring Billing Data.
9 Generate Invoices	On each billing cycle, if the subscription generated becomes due for billing, a billing statement (invoice) is generated with the applicable charges for a subscription. If the billing mode of a subscription is set to **Anniversary**, the billing module automatically generates invoices on each billing date. If the billing mode is set to **Fixed Date**, the billing module generates invoices when the Bill Run option is enabled in the Billing Operations Center. An invoice is generated for all bills currently due and all unbilled subscriptions from previous billing cycles (if any). For more information, see Invoicing.

Multi-Queue Support for Recurring Billing Batch Processes

> **Note:** Multiple queues or processors are available only to users with SuiteCloud Plus License. For more information on SuiteCloud Plus, see the help topic SuiteCloud Plus Settings.

The Recurring Billing SuiteApp includes multi-queue support for Recurring Billing batch processes such as billing, usage-based rating, subscription creation, and charge creation.

The multi-queue implementation is enabled by default in the latest version of the Recurring Billing SuiteApp.

The following sections provide information about the Recurring Billing batch process implementations:

- Billing, Usage-Based Rating, and Charge Creation
- Subscription Creation

For more information on script deployment schedules and batch process runs, read the following help topics:

- Setting Up Recurring Billing Script Deployment Schedules

- Subscription Billing Dashboard
    - Setting Up the Subscription Billing Dashboard
    - Batch Process Manager
    - Batch Process Run Charts
    - Update Script Deployments
    - Script Runner
- Manually Running Batch Processes
- Viewing Recurring Billing Batch Process Run Status
- Process Queue Batch Record
    - Deleting Process Queue Batch Records

Billing, Usage-Based Rating, and Charge Creation

Recurring Billing SuiteApp's billing, usage-based rating, and charge creation processes are implemented using a scheduler script and a process script.

Batch Process Type records define the scheduler script, process script, deployments count, and default batch size of these Recurring Billing batch processes. These records cannot be accessed from the NetSuite user interface. The Batch Process Manager portlet lets you update Batch Process Type records without going to the actual record. For information about setting up this portlet on your Subscription Billing Dashboard, see Subscription Billing Dashboard and Batch Process Manager.

The following table shows the scheduler and process scripts used by these batch processes.

> **Important:** The scheduler scripts for billing, usage-based rating, and charge creation are not scheduled by default. You must specify your preferred schedule for the deployment of these scheduler scripts. For more information, see Setting Up Recurring Billing Script Deployment Schedules.

Batch Process Type	Scheduler Script	Process Script	Description
Billing	SWV_SB_SS_BEScheduler	SWV_SB_SS_BillTran	Generates invoices for subscriptions that are due for billing.
Usage-Based Rating	SWV_SB_SS_REScheduler	SWV_SB_SS_CreateUsageBasedCharge	Generates charges for imported usage data for variable usage subscription items.
Create Charge	SWV_SB_SS_CCScheduler	SWV_SB_SS_CreateCharges	On its scheduled run, it generates charges past the minimum term and charges for term extension.

Batch Process Type	Scheduler Script	Process Script	Description
			Note: Subscription items with complete charges (that is, end of the last charge is the end of the subscription) will not be batched by the CCScheduler script. For perpetual subscriptions, the items will still be batched but generation of charges will depend on the minimum term and notice period settings. The process script is also used to generate charges during subscription creation and subscription item renewal. In these cases, the process script is deployed by the subscription creation or subscription item renewal script. For more information, see Subscription Creation.

Scheduler Script

On its scheduled run, the scheduler script searches for jobs to be processed and distributes them into batches. A Batch Process Index record is created to identify a batch process run, and Process Queue Batch records are created for each batch. When all jobs are placed in a batch record, the scheduler script deploys the process scripts to process the batches.

Process Script

The process script runs using the number of deployments set on the Batch Process Manager portlet on the Subscription Billing Dashboard. For more information, see Subscription Billing Dashboard.

Each deployment of the process script picks up a batch record and processes it. After a process script finishes processing a batch, it restarts and gets another available batch to process.

If there is no more available batch to process, a process script stays active if at least one deployment is still processing a batch. A process script continually restarts so that if another script fails to successfully finish processing a batch (because of usage or time limit), it can readily pick up the unfinished batch and process it.

The entire batch process run ends when all batch records have been successfully processed.

Important Things to Note:

- Verify that dynamically created deployments of the process scripts have a log level set to Error. The Update Script Deployments portlet lets you update multiple deployment records without going through individual records. For more information about this portlet, see Update Script Deployments.

  For usage-based rating and charge creation, you can manually run the scheduler script to process specific subscriptions or subscription items. For more information, see Manually Running Batch Processes. The Script Runner portlet also lets you run script deployments of Recurring Billing batch processes without going to the script deployment record. For more information about this portlet, see Script Runner.
- If you run the scheduler scripts manually and there are no Batch Process Index record and Process Queue Batch records to be processed, no charges or invoices will be created.
- You can set up batch process portlets on the Subscription Billing Dashboard to help you manage and monitor your batch process runs. For more information, see Subscription Billing Dashboard.

Subscription Creation

The subscription creation process does not use a scheduler script and no Batch Process Index record is created for its batch process runs. Therefore, the Process Queue Batch records created by the subscription creation process are considered independent.

Subscription creation starts when a subscription sales order is approved. The process involves creating the subscription record, primary subscription items, secondary subscription items, and charge records. For the secondary subscription item and charge creation, the process creates independent Process Queue Batch records then deploys the corresponding process scripts to process the batches.

The following table shows the process scripts used by the subscription creation process.

Batch Process Type	Process Script	Description
Subscription Creation	SWV_SB_SS_SecondarySubItemGenerator	Creates the secondary subscription items for each primary item and the first charge for each secondary item. When all secondary subscription items and its first charge have been created, the status of the subscription changes from Initializing to Open.
Create Charge	SWV_SB_SS_CreateCharges	Creates the remaining charges for the secondary subscription items based on its term (or based on the minimum term if the term is more than 36 months).

For more information about process script implementation, see Process Script.

Subscription Billing Dashboard

The Recurring Billing SuiteApp includes a collection of portlets that you can set up on the Subscription Billing Dashboard to help you manage and monitor your batch process runs. These portlets are developed to provide an instant visual overview of Recurring Billing batch process run status and related data.

You can set up the following batch process portlets on your Subscription Billing Dashboard.

- Batch Process Manager
- Batch Process Run Charts

- Update Script Deployments
- Script Runner

By default, only users with an administrator role have access to the Subscription Billing Dashboard.

For information about setting up these portlets on your dashboard, see Setting Up the Subscription Billing Dashboard.

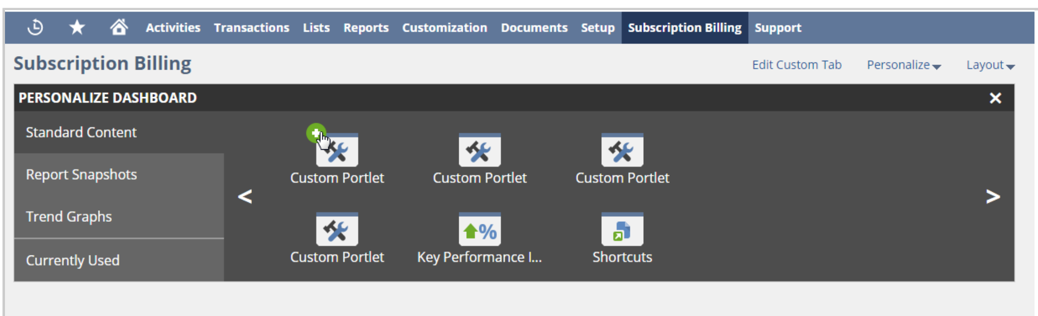
The Subscription Billing Dashboard supports the following Recurring Billing batch process types: Billing, Create Charge, Subscription Creation, and Usage-Based Rating. For more information about Recurring Billing batch processes, see Multi-Queue Support for Recurring Billing Batch Processes.

Setting Up the Subscription Billing Dashboard

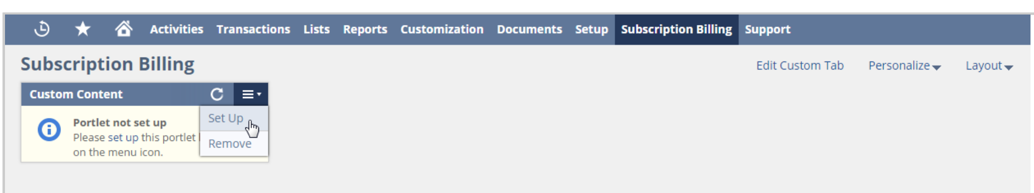
You must manually set up the Subscription Billing Dashboard to show the batch process portlets that you want to use.

To set up the batch process portlets on the Subscription Billing Dashboard:

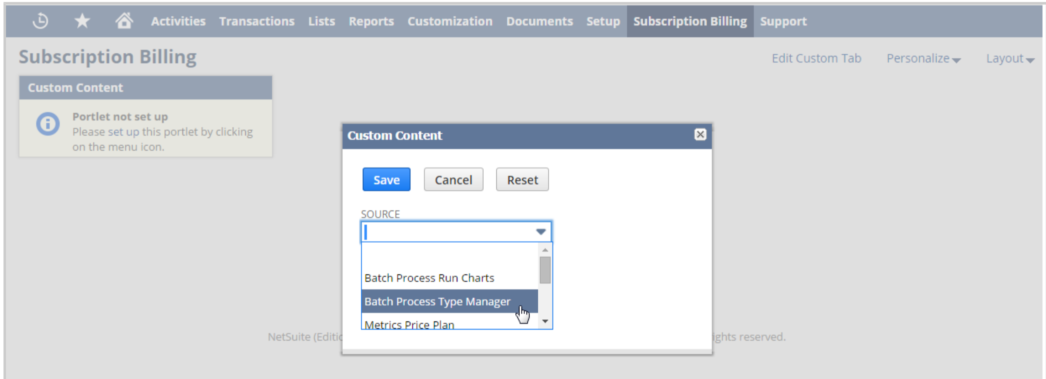
1. Click the **Subscription Billing** tab.
2. On the Subscription Billing dashboard, click the **Personalize** link.
3. Under Standard Content, click or drag and drop one of the **Custom Portlet** link to add it to the dashboard.



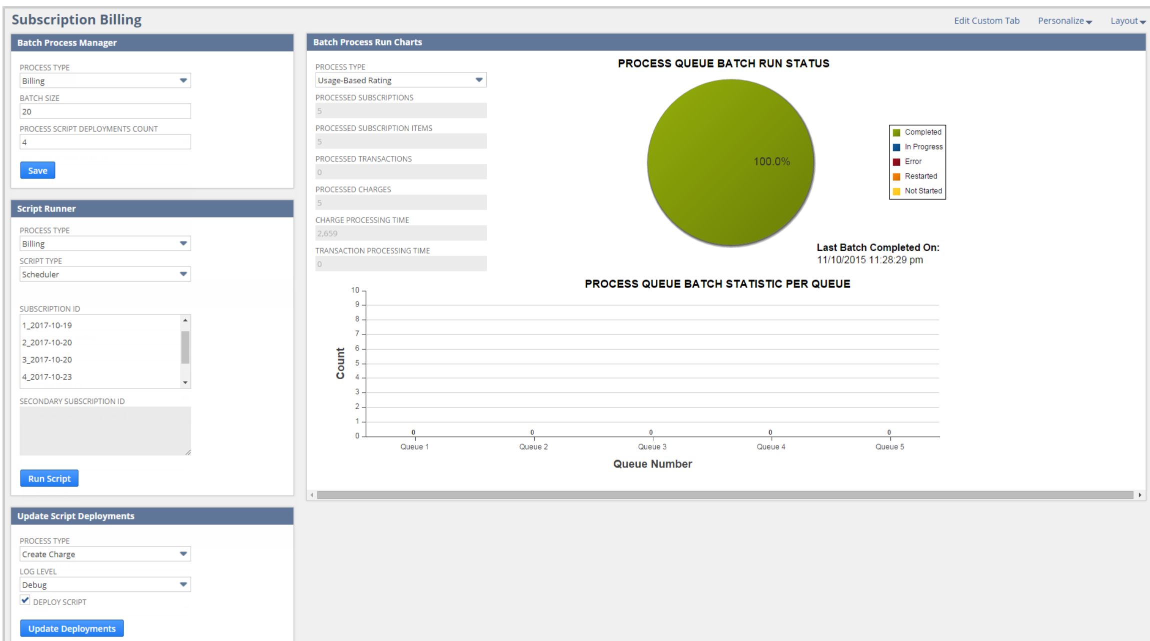
4. On the empty Custom Content porlet, click **Set Up**.



5. Select the source for the portlet. The following batch process portlets are available:
   - Batch Process Manager – This portlet lets you update Batch Process Type records. You can update the batch size and set the process script deployments count for the selected batch process.
   - Batch Process Run Charts – This portlet lets you monitor the status of process queue batch runs.
   - Update Script Deployments – This portlet lets you update multiple deployment records for a selected process type.
   - Script Runner – This portlet lets you run script deployments of Recurring Billing batch processes without going to the script deployment record.



6. Click **Save**.
7. Repeats Steps 2 to 7 for each batch process portlet that you want to appear on the dashboard.



Read the specific help topics for each batch process portlet for more information about how to use them to manage and monitor your batch process runs.

- Batch Process Manager
- Batch Process Run Charts
- Update Script Deployments
- Script Runner

Batch Process Manager

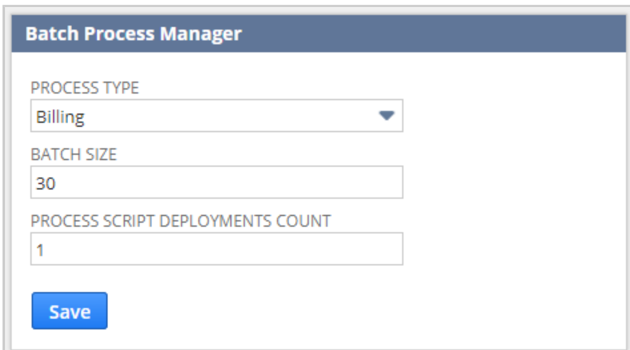
Batch Process Type records define the scheduler script, process script, deployments count, and default batch size for each Recurring Billing batch process. Altering critical fields on these custom records may result to processing problems, so the actual records cannot be accessed from the NetSuite user interface.

The Batch Process Manager portlet lets you update the Batch Process Type records without going to the actual record. From the portlet, you can update the batch size and set the process script deployments count for a selected process type.

For more information about batch process types, scheduler scripts, and process scripts, see Multi-Queue Support for Recurring Billing Batch Processes.

To update a Batch Process Type record from the Batch Process Manager portlet:

1. Set up the Batch Process Manager portlet on your Subscription Billing Dashboard. For more information, see Setting Up the Subscription Billing Dashboard.
2. On the Batch Process Manager portlet, select the process type that you want to update. The current settings for the selected process type is shown on the portlet.



3. In the following fields, specify the updates for the selected process type:

Batch Process Manager Portlet Field	Description
Batch Size	Update the batch size for the selected process type. The batch size determines the number of records to be placed in a Process Queue Batch record during batch runs. You can enter any integer from 1 to 50.
Process Script Deployments Count	Set the number of process script deployments that you want to run for the selected process type. You can enter any integer from 1 to the maximum number of queues or processors available in your NetSuite account. **Note:** Multiple queues or processors are available only to users with SuiteCloud Plus License. In accounts without SuiteCloud Plus License, the Process Script Deployments Count is set to 1 by default for all process types. For information about SuiteCloud Plus, see the help topic SuiteCloud Plus Settings.

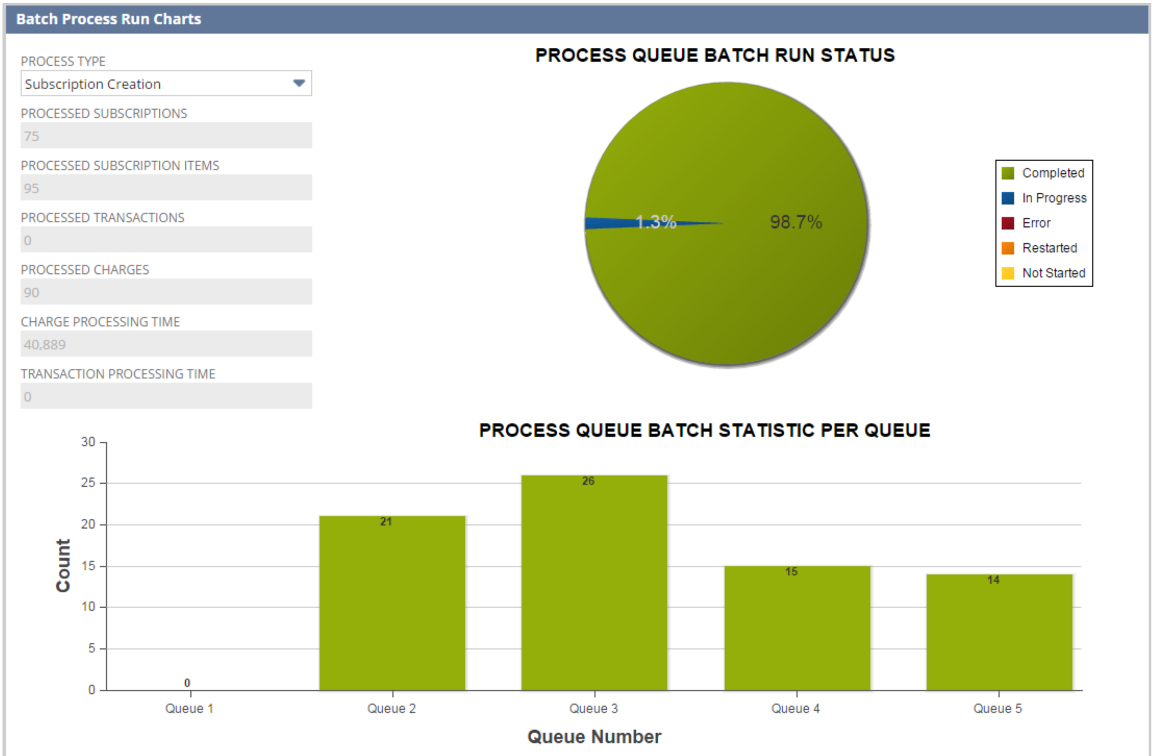
4. Click **Save**.

Batch Process Run Charts

The Batch Process Run Charts portlet enables you to monitor the status of batch process runs for a selected process type.

For information about setting up this portlet on your Subscription Billing Dashboard, see Setting Up the Subscription Billing Dashboard.

To view the status of a batch process type, select a value in the **Process Type** field on the Batch Process Run Charts portlet. The portlet loads the data captured for the process type at the time of selection. If a batch run is in progress, you need to click the refresh icon on the portlet to refresh the portlet data.



The following data and charts are available on this portlet:

- **Batch Run Summary** – This section shows data from the Batch Run Summary saved search, including the following:

Batch Run Summary Fields	Description
Processed Subscriptions	Number of successfully processed subscriptions.
Processed Subscription Items	Number of successfully processed subscription items.
Processed Transactions	Number of processed transactions. This field is applicable only to billing.
Processed Charges	Number of processed charges. This field is applicable only to subscription creation, charge creation, and usage-based rating.
Charge Processing Time	Total time (in milliseconds) for the charge generation. This field is applicable only to subscription creation, charge creation, and usage-based rating.
Transaction Processing Time	Total time (in milliseconds) for the transaction creation. This field is applicable only to billing.

- **Process Queue Batch Run Status** – This pie chart shows the percentage of Process Queue Batch records that are Not Started, Restarted, Error, In Progress, or Completed for the selected process type. Point to the sections of the pie chart to see the number of Process Queue Batch count per status.

- **Process Queue Batch Run Statistics Per Queue** – This bar chart shows the number of Process Queue Batch records processed per queue.

The following table shows where the data are sourced for each process type.

Process Type	No scripts running (1)	Batch run in progress
Billing Usage-Based Rating	Shows data from last completed Batch Process Index. Timestamp on the portlet is based on the last completed Batch Process Index.	Shows data from the open Batch Process Index that is currently being processed.
Create Charge (2) Subscription Creation (2)	Shows data from all available Process Queue Batch records. Timestamp on the portlet is based on the last completed Process Queue Batch record.	Shows data from all available Process Queue Batch records.
(1) Applicable to Batch Run Summary and Process Queue Batch Run Status (pie chart) only. For Process Queue Batch Statistics Per Queue (bar chart), no data is shown when there is no script running for the selected process type. (2) The data for Create Charge and Subscription Creation processes are based on all available Process Queue Batch records, even the ones that are not part of the current (or last) batch run. The Subscription Creation process does not use a scheduler script, so independent Process Queue Batch records are created with no Batch Process Index. The data for Create Charge includes Process Queue Batch records from scheduled runs (through the scheduler script, with a Batch Process Index) and independent Process Queue Batch records that are created as part of the Subscription Creation process (without a Batch Process Index).		

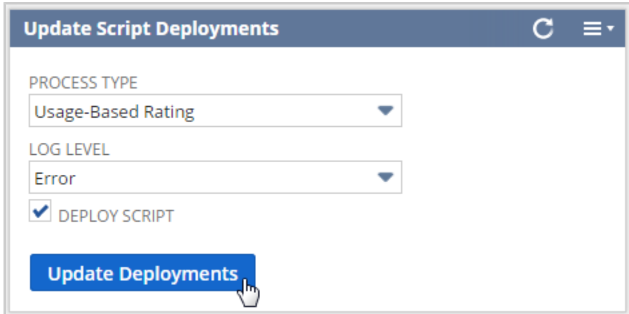
For information about Recurring Billing batch process implementations, see Multi-Queue Support for Recurring Billing Batch Processes.

Update Script Deployments

The Update Script Deployments portlet lets you update multiple deployment records without going through each individual record. From this portlet, you can change the log level or deploy status of all process script deployment records for the selected process type.

To update process script deployment records from the Update Script Deployments portlet:

1. Set up the Update Script Deployments portlet on your Subscription Billing Dashboard. For more information, see Setting Up the Subscription Billing Dashboard.
2. On the Update Script Deployments portlet, select the process type of the deployment records that you want to update.



> **Note:** The values for the log level and deploy status on this portlet do not show the current (actual) values on the deployment records for the selected process type.

3. In the **Log Level** field, set the log level value for all the process script deployment records of the selected process type. For information about script execution log levels, see the help topic Setting Script Execution Log Levels.
4. If you want to undeploy all process script deployments of the selected process type, clear the **Deploy Script** box.

   Take note of the following when undeploying scripts:

   - If the scripts for the selected process type are currently running, it will be stopped when you undeploy the scripts through this portlet.
   - On the scheduled run of the scheduler scripts, undeployed script records will be set to deployed and will be run.
   - You cannot undeploy the scripts for Subscription Creation. Therefore, the **Deploy Script** box is disabled (and checked by default) if you select **Subscription Creation** in the **Process Type** field.
5. Click **Update Deployments**.

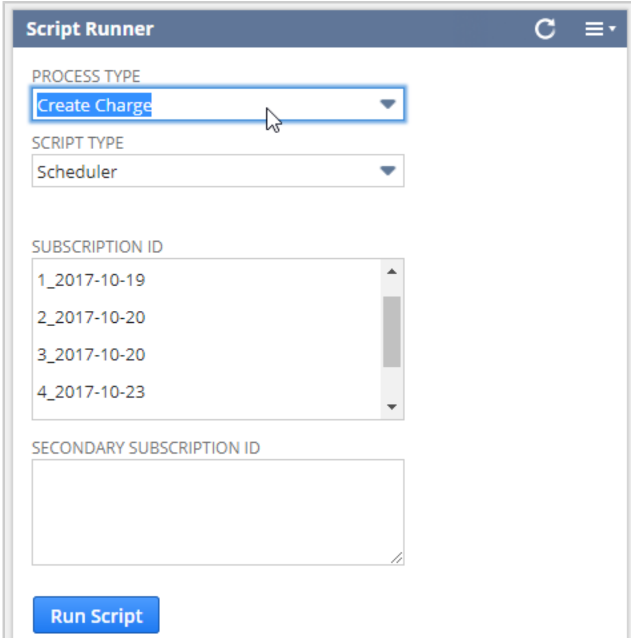
To check the results of the update you made on this portlet, view the script deployment records.

Script Runner

The Script Runner portlet lets you run script deployments of Recurring Billing batch processes without going to the script deployment record.

To run a batch process script from the Script Runner portlet:

1. Set up the Script Runner portlet on your Subscription Billing Dashboard. For more information, see Setting Up the Subscription Billing Dashboard.
2. On the Script Runner portlet, select the process type that you want to run.



3. Set the values for the following fields:

Script Runner Portlet Fields	Description
Script Type	Select the type of script that you want to run. ■ **Scheduler** – Runs the scheduler script for the selected process type. ■ **Process Script** – Runs the process scripts for the selected process type. Take note of the following: □ The **Subscription ID** and **Secondary Subscription Item ID** fields are disabled if you selected **Process Script** in this field. □ If you selected **Subscription Creation** in the **Process Type** field, the **Script Type** field is disabled and defaults to **Process Script** because this process does not use a scheduler script. For more information, see Subscription Creation. □ You should run process scripts only for troubleshooting purposes or if the deployments were modified. If there are no Process Queue Batch records to process, running the process scripts will have no effect (that is, no records will be created or updated). For more information about batch process types, scheduler scripts, and process scripts, see Multi-Queue Support for Recurring Billing Batch Processes.
Subscription ID	If you want the scheduler script to process specific subscriptions, select the ID of the subscription in this field. You can select one or more subscriptions by pressing the Ctrl key on your keyboard while selecting subscriptions IDs from the list. This field is applicable only to Billing, Charge Creation, and Usage-Based Rating.
Secondary Subscription Item ID	If you want the scheduler script to process specific subscription items, enter the ID of the secondary subscription item in this field. You can enter one or more subscription item IDs in this field. This field is applicable only to Charge Creation and Usage-Based Rating.

> **Note:** If you enter a value in the **Subscription ID** field, the **Secondary Subscription Item ID** field is disabled, and vice versa. If both the **Subscription ID** and **Secondary Subscription Item ID** fields are blank, all valid subscriptions for the selected process type will be processed.

4. Click **Run Script**.

Manually Running Batch Processes

For usage-based rating and charge creation, you can manually run the scheduler script to process specific subscriptions or subscription items by specifying a value for the Subscription ID or Secondary Sub Item ID parameter on the scheduler script deployment record.

The Script Runner portlet also lets you to run script deployments of Recurring Billing batch processes without going to the actual script deployment record. For more information about this portlet, see Script Runner.

To manually run the usage-based rating or charge creation process:

1. Go Customization > Scripting > Scripts.
2. Click the **Deployments** link of the scheduler script that you want to run:
   - For usage-based rating: SWV_SB_SS_REScheduler
   - For charge creation: SWV_SB_SS_CCScheduler
3. Edit the deployment record for on-demand (manual) run (that is, the deployment record with a status of **Not Scheduled**):
   - For usage-based rating: **customdeploy_sb_re_scheduler_man** (SWV_SB_SS_REScheduler_Manual)
   - For charge creation: **customdeploy_sb_cc_scheduler_man** (SWV_SB_SS_CCScheduler_Manual)
4. To select only specific records to be processed, specify a value for either the **Subscription ID** or **Secondary Sub Item ID** field on the **Parameters** subtab.

   > **Warning:** Do not enter values in the **Last Item Processed** and **Max Secondary Item ID** fields. These fields are used by the scheduled deployments of the REScheduler and CCScheduler scripts.

5. Make sure that the status is set to **Not Scheduled**.
6. Click **Save and Execute**.

Viewing Recurring Billing Batch Process Run Status

To help you monitor the status of batch process runs, the following saved searches are available with the Recurring Billing SuiteApp.

- **Running Batch Processes** – This saved search shows the status of Process Queue Batch records for the Batch Process Index that is currently being processed. Data such as process index, process type, start and end time, batch size, batch run state, and assigned process queue are shown in the saved search results. You can filter the results by process type. The saved search result is empty if there are no Batch Process Index record and Process Queue Batch records being processed.
- **Batch Process Run Summary** – This saved search shows a summary of batch process runs. The results show batch process run data such as process index, process type, start and end time, batch size, total jobs processed (subscriptions, subscription items, transactions, and charges) and total processing time. You can filter the results by process type.

You can access these saved searches by going to Lists > Search > Saved Searches. For more information about displaying saved searches on your dashboard, see the help topic Displaying Saved Search Results on Your Dashboard.

You can also set up the Batch Process Run Charts portlet on your Subscription Billing Dashboard to help you monitor the status of batch process runs. For more information about this portlet, see Batch Process Run Charts.

Process Queue Batch Record

A Process Queue Batch record contains information about the batch and the results of the batch run.

To view the Process Queue Batch records, go to Customization > Lists, Records, & Fields > Record Types. Look for **Process Queue Batch** and click its corresponding **List** link.

Deleting old process queue batch records is recommended for improved performance. For more information, see Deleting Process Queue Batch Records.

The following table describes the information found on a Process Queue Batch record.

Warning: Do not modify the information on Process Queue Batch and Batch Process Index records. Altering any information on these custom records may result to processing problems.

Field Name	Description
Deployment ID	ID of the process script deployment that picked up the process queue batch.
Batch IDs	Array of IDs to process for the batch.
Batch Process Type	Process type for the batch.
Processing Start	Timestamp value set when the batch is selected and started by the process script.
Processing End	Timestamp value set when the batch processing is completed by the process script.
Retry Count	Number of times that the batch is selected and started by a process script.
Process Index	Identifier for the batch process run. This field shows the ID of the batch process index where the process queue batch belongs. This field is blank for subscription creation and for charge creation via subscription creation or subscription item renewal process.
Batch Size	Number of jobs in a batch.
Processed Subscriptions	Number of subscriptions in the batch that is successfully processed.
Processed Subscription Items	Number of subscription items in the batch that is successfully processed.
Processed Charges	Number of charges created. This field is applicable only to subscription creation, charge creation, and usage-based rating.
Processed Transactions	Number of invoices created. This field is applicable only to billing.
Charge Processing Time	Total time (in milliseconds) for the creation of charge records. This field is applicable only to subscription creation, charge creation, and usage-based rating.
Transaction Processing Time	Total time (in milliseconds) for the creation of transaction records. This field is applicable only to billing.

Field Name	Description
Batch Run State	Current state of the batch run. ▪ **In Progress** – The process queue batch is selected by a process script. ▪ **Completed** – The processing of all the jobs in the batch has been completed. ▪ **Restarted** – The batch has been restarted. This means that not all jobs in the batch has been successfully processed because of usage or time limit. The processing of the batch has stopped and the remaining jobs are started in a new batch. ▪ **Error** – The batch run caused an error that was caught in the process script. If an error is encountered during processing, the process script will still continue to process the remaining jobs in the batch. The ID of the subscription that encountered error during processing is reported in the Processing Result field in JSON format.
Processing Result	Result of the batch run in JSON format. ▪ **processed_subs** – IDs of processed subscriptions ▪ **processed_sub_items** – IDs of processed subscription items ▪ **charges** – IDs of created charges (only applicable to subscription creation, charge creation, and usage-based rating) ▪ **transactions** – IDs of created invoices (only applicable to billing) ▪ **error_subs** – IDs of subscriptions that encountered error during processing ▪ **error_sub_items** – IDs of subscription items that encountered error during processing (only applicable to subscription creation, charge creation, and usage-based rating) ▪ **skipped_sub_items** – IDs of secondary subscription items that were not processed (that is, items that have a data creation label of 3.0.1) ▪ **missing_charge_subs** – IDs of subscriptions with missing charges (only applicable to billing) Check the Error Info field on the subscription record for more information about troubleshooting the error.

Deleting Process Queue Batch Records

Deleting old process queue batch records regularly is recommended for improved performance.

You can manually run a scheduled script to delete process queue batch records for each process type.

> **Warning:** The SWV_SB_SS_DeleteProcessQueueBatch script deletes all process queue batch records for the process type specified on the deployment record, regardless if the batch record has been processed or not. To prevent the script from deleting batch records that are not yet processed, make sure that there are no other scripts running when you execute the delete process queue batch script. **You should run this script manually during off-peak hours of operation.**

To delete process queue batch records:

1. Go to Customization > Scripting > Scripts.
2. Look for **SWV_SB_SS_DeleteProcessQueueBatch** and click its corresponding **Deployments** link.
3. Edit **customdeploy_sb_delete_proc_queue_batch**.
4. On the **Parameters** subtab:
   - In the **Process Type** field, specify the process type of the process queue batch records to be deleted.
   - To delete only records from a certain period, specify a date and time value in the **Process Start Filter** field. Date and time values must be entered in the date and time format set in the

user preferences. Only records created on or before the specified date will be deleted. This field is optional.

5. Make sure that the status is set to **Not Scheduled**.
6. Click **Save and Execute**.

Setting Up Recurring Billing

The following lists outline the procedures for setting up and using the Recurring Billing SuiteApp.

Installing and Setting Up the Recurring Billing SuiteApp

1. Installing the Recurring Billing SuiteApp
2. Roles and Permissions for Recurring Billing
3. Setting Up Recurring Billing Preferences
4. Setting Up Recurring Billing Accounting Preferences
5. Setting Up Recurring Billing Forms Preferences
6. Configuring Localization Preferences
7. Setting Up Fixed Billing Dates
8. Setting Up Recurring Billing Script Deployment Schedules

Setting Up Recurring Billing Items and Plans

1. Setting Up Subscription Items
2. Setting Up Rate Plans
3. Setting Up Billing Plans
4. Setting Up Charge Plans
5. Setting Up Subscription Categories
6. Setting Up Subscription Plans
7. Setting Up Subscription Plan Items

Installing the Recurring Billing SuiteApp

Recurring Billing is provided as a SuiteApp developed by NetSuite.

Contact your NetSuite account manager to purchase the Recurring Billing SuiteApp and to have the bundles shared with your account so that you can install it.

Checking for System Prerequisites

Check for the following system prerequisites before installing the Recurring Billing SuiteApp.

- Make sure that the following features are enabled. Go to Setup > Company > Enable Features. For more information, see the help topic Enabling Features.

Feature	Enable Features Subtab
A/R (Accounts Receivable)	Accounting
Sales Orders	Transactions
Return Authorizations	Transactions

Feature	Enable Features Subtab
Multiple Prices	Transactions
Charge-Based Billing	Transactions
Opportunities	CRM
Custom Records	SuiteCloud
Client SuiteScripts	SuiteCloud
Server SuiteScripts	SuiteCloud
SuiteFlow	SuiteCloud

- Make sure that you have set up a default expense account and default income account. To set up the default accounts, go to Setup > Accounting > Accounting Preferences. On the **Items/Transactions** subtab, select a value for the **Default Expense Account** and **Default Income Account** fields.
- Disable automatic loading of charges to invoices, cash sales, credit memos, and cash refunds. To disable this preference, go to Setup > Accounting > Invoicing Preferences. On the **Charge** subtab, clear the **Automatically Add Charges To Invoices, Cash Sales, Credit Memos, and Cash Refunds** box.

Installing the Recurring Billing SuiteApp

Install the following bundles for the Recurring Billing SuiteApp. Make sure to first install the configuration bundle before installing the main Recurring Billing bundle.

- **Recurring Billing Configuration**
- **Recurring Billing**

> **Note:** On the Preview Bundle Update page, check that the **Action** is set to **Update** and the **Preference** is set to **Update Deployments** for the bundle contents.

For information on installing SuiteApps, see the help topic Installing a Bundle.

The Recurring Billing SuiteApp is a managed bundle and is automatically updated whenever there are updates. Any fixes and enhancements are available after the bundle is updated in your account.

Roles and Permissions for Recurring Billing

Recurring Billing provides the following default roles upon installation of the SuiteApp:

- SB Billing Analysts
- SB Billing Manager
- SB Customer Service Representative
- SB Marketing Analyst
- SB Marketing Manager
- SB Sales Manager
- SB Sales Person

These roles are configured with a default set of associated permissions required to access data, tasks, and pages in the Recurring Billing SuiteApp. To view the default permissions assigned to these roles, go to Setup > Users/Roles > Manage Roles, and click the link for the role.

You cannot directly assign the default roles to users. You must create a new role based on these default roles, select the appropriate permissions, then assign these customized roles to users.

To customize and assign Recurring Billing roles to users:

1. Login with an administrator account.
2. Go to Setup > Users/Roles > Manage Roles.
3. Click the **Customize** link next to the role that you want to create.
4. Enter a name for the role.
5. Check the **Is an SB Role** box.
6. Select one or more custom permissions, depending on the functions that should be available for the role.

   The following custom permissions are available in the Recurring Billing SuiteApp:

   - Renew/Terminate Subscriptions
   - Subscription/Rating Plan (Analyst Level) - Edit Prepare/Rejected
   - Subscription/Rating Plan (Manager Level) - Approve/Reject
   - Subscription/Rating Plan - Make Available/Unavailable
   - Bill on Demand
   - Migrate Subscription Plan

   > **Note:** To make the **Run Billing** and **Rollback Bill Date** buttons available on open/active subscriptions, the **Bill On Demand** custom permission must be selected for standard and custom Recurring Billing roles.

7. On the **Permissions** subtab, set the permissions for the role.

   Refer to the tables in the following sections for a list of permissions required to use the Recurring Billing SuiteApp:

   - Required Permissions for General Recurring Billing Operations
   - Required Permissions for Subscription Change Order Actions
   - Required Permissions for Billing-Related Operations

   > **Note:** For roles that will perform Recurring Billing operations, make sure to set the Custom Record permissions to include **Preference** with at least a view access.

8. Enter values in the other fields as necessary. For more information, see the help topic Customizing or Creating NetSuite Roles.
9. Click **Save**.
10. Assign the customized Recurring Billing role to an employee. For more information, see the help topic Assigning Roles to an Employee.

Required Permissions for General Recurring Billing Operations

The following table shows the permissions required to use the Recurring Billing SuiteApp. You can set permissions for a role on the **Permissions** subtab on the custom role page.

In addition to the permissions listed in the following table, you must also set specific permissions for roles that perform change orders and billing operations. For more information, read the following topics:

- Required Permissions for Subscription Change Order Actions
- Required Permissions for Billing-Related Operations

Permission	Subtab Type	Minimum Permission Level	Maximum Permission Level
Billing Setup	Transactions		Full
Cash Sales	Transactions	Edit	Full
Edit Forecast	Transactions	Edit	Full
Edit Manager Forecast	Transactions		Full
Establish Quotas	Transactions		Full
Estimate	Transactions	Edit	Full
Find Transactions	Transactions		Full
Invoice	Transactions	View	Full
Opportunity	Transactions	Edit	Full
Override Payment Hold	Transactions	Edit	Edit
Sales Order	Transactions	View	Edit
Sales Order Approval	Transactions		Full
Accounts Receivable	Reports	View	View
Lead Snapshot/Reminders	Reports	View	View
Quota Reports	Reports	View	View
Report Customization	Reports		Full
Report Scheduling	Reports		Full
Sales	Reports	View	View
Sales By Partner	Reports	View	View
Sales By Promotion	Reports	View	View
Sales Force Automation	Reports	View	View
Sales Order Fulfillment Reports	Reports	View	View
Sales Order Reports	Reports	View	View
Sales Order Transaction Report	Reports	View	View
Web Site Report	Reports	View	View
Web Store Report	Reports	View	View
Accounts Receivable Register	Lists	View	View
Calendar	Lists		Full
Companies	Lists		Full
Competitors	Lists		Full
Contact Roles	Lists		Full
Contacts	Lists		Full
CRM Groups	Lists		Full
Currency	Lists	View	View

Permission	Subtab Type	Minimum Permission Level	Maximum Permission Level
Custom Record Entities	Lists	View	Full
Customers	Lists	View	Full
Documents and Files	Lists	View	Full
E-mail Template	Lists		Full
Employees	Lists	View	View
Events	Lists		Full
Export Lists	Lists	Create	Create
Fax Messages	Lists	Edit	Edit
Fax Template	Lists	Edit	Edit
Internal Publisher	Lists		Full
Items	Lists	View	Edit
Lead Conversion	Lists		Full
Letter Messages	Lists	Edit	Edit
Mail Merge	Lists	Edit	Edit
Mass Updates	Lists	Edit	Edit
Non Posting Registers	Lists	View	View
Notes Tab	Lists	Create	Full
PDF Messages	Lists	Edit	Edit
PDF Template	Lists	Edit	Edit
Perform Search	Lists	View	Full
Phone Calls	Lists		Full
Promotion	Lists		Full
Resource	Lists	Create	Create
Subsidiaries	Lists	View	View
Tasks	Lists		Full
Track Messages	Lists		Full
Units	Lists	View	View
Upsell Assistant	Lists		Full
Upsell Wizard	Lists		Full
Work Calendar	Lists	View	View
Accounting Lists	Setup	Edit	Edit
CRM Lists	Setup	View	View
Custom Body Fields	Setup	Edit	Edit
Custom Column Fields	Setup	Edit	Edit
Custom Entity Fields	Setup	Edit	Edit
Custom Entry Forms	Setup		Full

Permission	Subtab Type	Minimum Permission Level	Maximum Permission Level
Custom Fields	Setup	Edit	Edit
Custom Lists	Setup	Edit	Edit
Custom Subtabs	Setup	Edit	Edit
Custom Transaction Fields	Setup	Edit	Edit
Custom Transaction Forms	Setup		Full
Customer Status	Setup		Full
Import CSV File	Setup	Full	Full
Lead Conversion Mapping	Setup		Full
Online Customer Form	Setup		Full
Sales Territory	Setup		Full
Sales Territory Rule	Setup		Full
Set Up Image Resizing	Setup		Full
Upsell Setup	Setup		Full
Bill Run	Custom Record	Edit	Edit
Billing Frequency	Custom Record	View	View
Billing Plan	Custom Record	View	Full
Charge Plan	Custom Record	View	Full
Preference	Custom Record	View	Edit
Pro Forma Invoice	Custom Record	Edit	Edit
Pro Forma Invoice Item	Custom Record	Edit	Edit
Rate Plan	Custom Record	View	Full
RB Charge Type	Custom Record	View	View
Service Record	Custom Record	View	Edit
Subscription	Custom Record	View	Edit
Subscription Item	Custom Record	View	Edit
Subscription Plan	Custom Record	View	Full
Subscription Plan Item	Custom Record	View	Full
Subscription Term	Custom Record	View	View
Usage Data	Custom Record	View	Full
Usage Tier	Custom Record	View	Full
Usage Unit	Custom Record	View	Full

Required Permissions for Subscription Change Order Actions

The following table shows the permissions required specifically for roles that perform subscription change order actions.

Subscription Change Order Action	Target Record	Permissions Subtab							
		Transactions	Lists		Setup	Custom Record			
		Charge	Custom Record Entries	Documents and Files	SuiteScript	Preference	Subscription	Subscription Item	Subscription Adjustment
Add One-Time Charge	Primary Subscription Item	View	View	-	Full	View	View	Edit	-
Add Subscription Item	Subscription	View	View	-	Full	View	Edit	View	-
Extend Subscription Item End Date	Subscription	View	View	-	Full	View	Edit	Edit	-
	Primary Subscription Item	View	View	-	Full	View	View	Edit	-
Migrate Subscription Plan	Primary Subscription Item	View	View	View	Full	Edit	View	Edit	-
Modify Quantity for Fixed Usage	Primary Subscription Item / Secondary Subscription Item	View	View	-	Full	View	View	Edit	-
Modify Subscription Item Rate	Secondary Subscription Item	View	View	-	Full	View	View	Edit	View
Modify Subscription Item Start Date	Subscription	View	View	-	Full	View	Edit	Edit	-
	Primary Subscription Item	View	View	-	Full	View	View	Edit	-
Reactivate Subscription Item	Subscription	View	View	-	Full	View	Edit	Edit	-
	Primary Subscription Item	View	View	-	Full	View	View	Edit	-
Suspend Subscription Item	Subscription	View	View	-	Full	View	Edit	Edit	-
	Primary Subscription Item	View	View	-	Full	View	View	Edit	-
Terminate Subscription Item	Subscription	View	View	-	Full	View	Edit	Edit	-
	Primary Subscription Item	View	View	-	Full	View	View	Edit	-

Required Permissions for Billing-Related Operations

The following table lists the permissions and role settings required specifically for roles that perform billing-related operations.

Billing Feature	Permissions Subtab										Custom Permissions	Center Type
	Transactions						Setup	Lists	Custom Record			
	Charge	Cash Sale	Sales Order	Invoice	Find Transaction	Credit Memo	SuiteScript	Mass Update	Subscription	Subscription Item		
Billing Operations Center (BOC)	View	-	-	-	-	-	Full	-	View*	View*	-	Classic Center
Run Billing	View	Create	-	Create	View*	-	-	-	View	View*	Bill On Demand	Any
Pre-Billing	View	-	View	Create	-	Create	-	Full	View	View	Bill On Demand	Any
*Recommended but not required.												

Displaying the Subscription Billing Tab for Specific Roles

By default, the Subscription Billing tab is available for all roles that use the following center types:

- Accounting Center
- Classic Center
- Marketing Center
- Sales Center
- Support Center

If you want to display the Subscription Billing tab for specific roles only, you can edit the Subscription Billing center tab and specify which roles will have access to it.

To modify the audience for the Subscription Billing center tab:

1. Go to Customization > Centers and Tabs > Center Tabs.
2. Look for **Subscription Billing** and click the **Edit** link for the center type that you want to modify the audience for.
3. Click the **Audience** subtab.
4. Clear the **Select All** box for Roles.
5. From the list of roles that use this center type, select the roles that you want to have access to the Subscription Billing tab. To make multiple selections, press the Ctrl key on your keyboard while selecting roles from the list.
6. Click **Save**.

Setting Up Recurring Billing Preferences

The Recurring Billing preferences allow you to set the default behavior of the billing system as well as set the default values for fields that apply to certain elements of the billing plan, rate plan, and the billing operations console. To set the Recurring Billing preferences, go to Subscription Billing > Account Setup > Subscription Billing Preferences.

By default, only administrators and users with a Recurring Billing role have access to the Subscription Billing Preferences page. For more information about Recurring Billing roles and permissions, see Roles and Permissions for Recurring Billing.

- General Billing Defaults

- Invoice Defaults
- Renewal Defaults
- Rating Defaults
- Fixed Date Billing Defaults
- General Preferences
- Integration Preferences

General Billing Defaults

The following preferences set the default values for some fields on the billing plan and charge plan forms.

Field	Description
Billing Mode	Select a default value for the Billing Mode field on the billing plan form.
Billing Frequency	Select a default value for the Billing Frequency field.
Billing Method	Select a default value for the Billing Method field on the charge plan form.
Term	Select a default value for the Term field on the billing plan form.
Termination Method	Select a default value for the Termination Method field on the billing plan form.
Month-End Anniversary Billing	Check this box to enable billing on the last day of the month for Anniversary subscriptions that start on month end. For more information, see Anniversary Billing.
Enable Pre-Billing	Check this box to enable pre-billing for multiple subscriptions using the SWV_SB_SS_BEScheduler script. When this box is checked, the **Pre-Billing** box is available on the BEScheduler script deployment record and on the Script Runner portlet (if Billing is selected in the **Process Type** field). You can check the **Pre-Billing** box when you run the BEScheduler script manually or through the Script Runner portlet to generate advance invoices for subscriptions. For more information, see Pre-Billing. **Note:** This preference is not automatically available in your account. If you want to show this preference, you need to run the SWV_SB_SS_CreatePreBillingPref script. This script adds and automatically checks the **Enable Pre-Billing** box on the Subscription Billing Preferences page. For more information, see Generating an Advance Invoice for Multiple Subscriptions.

Invoice Defaults

The following preferences determine how the billing generates invoices for items and subscriptions with zero amounts and how the system generates PDF invoices.

Field	Description
Create Invoices w/ 0.00 Amount	Check this box to enable by default the option to generate invoices regardless if the total bill amount is zero. An invoice with zero amount will be generated if this box is checked and at least one of the items in the subscription has a checked Show Zero Amount box.
Description Item	This is the item used for the description line item created in the invoice when the rate plan's Show Tier Breakdown box is checked and the display filter returns more than one row. The Rating Details field shows the tiers used in rating the usage as well as other information such

Field	Description
	as actual usage, net usage, included usage, minimum and maximum thresholds, usage from sibling aggregation, and historical usage.
Invoice Date Type	Select whether the current date or the billing date will be used as the transaction date for the invoice, cash sale, or credit memo generated during a bill run.

Renewal Defaults

The following preferences determine the default values and behavior of the billing system related to the renewal of subscriptions.

Field	Description
Renewal Action	Select a default value for the Renewal Action field on the billing plan form.
Days in Advance	Enter a default number of days for the Days in Advance field on the billing plan form.
Assign to	Select the default sales person to whom renewal sales transactions will be assigned.
Days after renewal date	Enter a default value for the Days After Renewal Date field on the billing plan form.
Term on renew	Enter a default value to specify the new term for renewals on the billing plan form.
Transaction Type	The default value of the transaction to be created if the renewal action is set to Create Transaction.

Rating Defaults

The following preferences determine the default search criteria used by the billing system for filtering customer usage data as well as the default values for certain fields of the rate plan.

Field	Description
Rating Defaults	
Rating Model	Select the default value for the Rating Model field of the rate plan form.
Default Usage Search Criteria	
Customer ID	Check this field to use the customer ID field as a default search criteria to be used by the rating engine for filtering customer usage data prior to processing them for rating. For information on how the default usage search criteria works, see Default Usage Search Criteria. For information on usage data fields, see Importing Recurring Billing Data.
Subscription ID	Check this field to use the subscription ID field as a default search criteria to be used by the rating engine for filtering customer usage data prior to processing them for rating. For information on how the default usage search criteria works, see Default Usage Search Criteria. For information on usage data fields, see Importing Recurring Billing Data.
Secondary Subscription Item ID	Check this field to use the secondary subscription item ID field as a default search criteria to be used by the rating engine for filtering customer usage data prior to processing them for rating. For information on how the default usage search criteria works, see Default Usage Search Criteria.

Field	Description
	For information on usage data fields, see Importing Recurring Billing Data.
Item ID	Check this field to use the item ID field as a default search criteria to be used by the rating engine for filtering customer usage data prior to processing them for rating. For information on how the default usage search criteria works, see Default Usage Search Criteria. For information on usage data fields, see Importing Recurring Billing Data.
Default Service Filter	Select the default value for the Service Filter field of the rate plan form. You can choose from the following values: ■ This Subscription Only ■ Include All Customer Subscriptions ■ Include Sibling Customer Subscriptions ■ Include Child Customer Subscriptions For more information about service filters, see Setting Up Rate Plans.
Formula for Proration	
Proration Formula	Define a custom proration formula that will be used by the rating engine as the multiplier for rate when creating charges. Use the following variables to define a proration formula: ■ SD – service days in a period ■ DPD – duration period (days) ■ DPM – duration period (months) ■ DCM – days of the current billing month ■ MR – months remaining in the period ■ DRM – days remaining for the current billing month ■ DRY – days remaining for the current billing year **Important:** The current version of the Recurring Billing SuiteApp only supports the following proration formulas: SD/DPD and (DRM/DCM)+MR. **Note:** If the proration formula is changed in the middle of the period, the new formula will be used and no adjustments will be made.

Fixed Date Billing Defaults

The following preferences determine the default options for subscriptions with fixed date billing mode and the default pro forma invoicing options.

Field	Description
Fixed Date Billing Defaults	
Global Prefix Saved Search	Enter the default prefix of the customer saved searches that is used by the billing engine when using a saved search scope for generating pro forma invoices. For more information, see Generating Pro Forma Invoices.
Default BOC Email Sender	Select the default sender of Billing Operations Center email messages.
Default Bill Run Mail Recipient	Enter the default recipient of bill run email messages.
Pro-forma Setting	

Field	Description
Scope	Select a default value for the Scope field on the Billing Operations Console.
Number of Customers	Enter a default value for the Number of Customers field on the Billing Operations Console.
Pro Forma Saved Search	Select a default pro forma saved search value for the Saved Search field of the Billing Operations Console.

General Preferences

The following preferences determine the behavior of the billing system when creating cash sales transactions and the default forms to be used by the billing system when creating billing-related records. You can also specify which forms require subscription billing information.

Field	Description
Create Cash Sales w/ 0.00 Amount	Check this box to enable the creation of cash sales when the amount is zero. A cash sale with zero amount will be generated if this box is checked and at least one of the items in the subscription has a checked Show Zero Amount box.
Apply Credit Memo	Check this box to automatically enable the Apply Credit Memo option on new customer records. For more information, see Applying Credit Memos.
Processing Mode	Select the processing mode to be used for batch process runs. ■ If you select **Normal**, all batch processes including subscription creation, charge generation, rating, and invoicing will run normally. ■ If you select **Data Migration**, only the subscription creation process will run normally. However, only the first charge will be created for all subscription items. The remaining charges will be created only when the processing mode is set back to normal.
Create Credit Memo for Negative Charge	Check this box to create a credit memo for negative charge. Clear this box to include negative charge amount in an invoice. **Note:** Subscription invoices with a negative charge must still have a positive net total amount. Otherwise, you will get an error.
Cash Sales Transaction Form	Select the default form to use when creating cash sales transactions from the billing engine.
Invoice Transaction Form	Select the default form to use when creating invoice transactions from the billing engine.
Entry Forms to Deploy Scripts	Designate item forms where billing plans and rate plans are required. Recurring Billing will not use forms that are not on this list.
Transaction Forms to Deploy Scripts	Designate sales orders, cash sales, and invoice forms where subscription information is required. Recurring Billing will not use forms that are not on this list. Only custom forms need to be selected in this field. **Note:** You do not need to select sales order forms customized from the NetSuite standard sales order form. Recurring Billing scripts are deployed on standard forms by design.
Default Primary Subscription Item Form	Select the default form to be used by the primary subscription item.

Field	Description
Default Secondary Subscription Item Form	Select the default form to be used by the secondary subscription item.
Credit Memo Transaction Form	Select the default form to be used for the credit memo transaction.
SO Form for Plugin	Specify the sales order form to be used for Recurring Billing Integration. When creating a subscription sales order using Recurring Billing Integration, make sure to use the correct method based on the sales order form that you selected in this preference. ▪ If you selected a form that is based on the NetSuite standard sales order form, use the rbCreateStandardSalesOrder method. ▪ If you selected a form that is based on the Recurring Billing custom form (Subscription Billing - Sales Order), use the rbCreateSalesOrder or rbCreateSubscriptionFromOrder method. For more information about Recurring Billing APIs, see Recurring Billing Integration.
Dedicated Queues	For Recurring Billing version 16.1 and later, the **Dedicated Queues** field on the Subscription Billing Preferences page is disabled and is no longer used by the Recurring Billing SuiteApp. To set the number of process script deployments for Recurring Billing batch processes (subscription creation, charge creation, usage-based rating, and billing), see Batch Process Manager.
Default Subscription Time Zone	Select the default subscription time zone. This time zone is used in determining the start and end dates of subscription items.
Allow Backdated Change Orders	Check this box to allow backdated change orders. If this box is checked, you can specify a past date as the effective date when you create subscription change orders. **Warning:** When this feature is enabled, it cannot be disabled and you will be responsible for the correct interpretation of the financial data. Any reports generated in which the covered period is when the backdated change was made may contain material errors. There is no change to feature capabilities if you do not enable this feature, you can only select the current date or any future date as the effective for subscription change orders. For more information, see Backdated Subscription Change Orders
Calculate Next Billing Amount After Rating	Check this box to automatically calculate the next billing amount after generating charges for variable usage items. If this box is checked, the SWV_SB_MR_CalculateNextBillingAmount script will automatically run after every completed run of the SWV_SB_SS_REScheduler script. For more information, see Calculating the Next Billing Amount for Subscriptions.

Integration Preferences

The fields on the Integration Preferences subtab are used for Recurring Billing Integration. These preferences determine the custom fields that will be added to the response objects of general discovery methods.

You must first create a saved search to define the fields that you want to add to the response object. For more information, see Custom Field Objects for General Discovery Methods.

Setting Up Recurring Billing Accounting Preferences

Make sure that you have set up Accounting Periods and Tax Schedules in your NetSuite account before using the Recurring Billing SuiteApp. For more information on setting up accounting periods, see the help topic Setting Up Accounting Periods.

You only need to set up Tax Schedules if you have the Advanced Taxes feature enabled in your account. For more information on setting up Tax Schedules, see the help topic Creating Tax Schedules.

Setting Up Recurring Billing Forms Preferences

You need to set the Recurring Billing forms as the default forms for Recurring Billing users. The following custom transaction forms and custom entry forms are added to your account during the installation of the Recurring Billing SuiteApp:

- Subscription Billing – Sales Order (transaction)
- Subscription Billing – Opportunity (transaction)
- Subscription Billing – Cash Sales (transaction)
- Subscription Billing – Invoice (transaction)
- Subscription Billing – Credit Memo (transaction)
- Subscription Billing – Non inventory (entry)
- Subscription Billing – Inventory (entry)
- Subscription Billing – Charge (entry)

> **Note:** The current version of the Recurring Billing SuiteApp supports the use of the standard NetSuite opportunity, estimate, and sales order form. If you will use the standard forms to create subscriptions, do not set the Subscription Billing – Sales Order form and Subscription Billing – Opportunity form as your preferred form. These custom forms will still be available with the SuiteApp but it will no longer support features and enhancements released in version 14.2 and later.

To set the Recurring Billing Transaction forms as default:

1. Go to Customization > Forms > Transaction Forms.
2. Check the **Preferred** box next to the Subscription Billing transaction forms.
3. Click **Submit**.

To set the Recurring Billing Entry form as default:

1. Go to Customization > Forms > Transaction Forms.
2. Check the **Preferred** box next to the Subscription Billing entry forms.
3. Click **Submit**.

For more information on custom transaction forms and custom entry forms, see the help topic Custom Forms.

Configuring Localization Preferences

The Localization Preferences enables you to create custom page labels to replace the standard Recurring Billing page labels. You can customize labels in the languages supported by the SuiteApp.

> **Note:** The Recurring Billing SuiteApp currently only supports English for page labels.

To configure Recurring billing labels:

1. Go to Subscription Billing > Account Setup > Localization Preferences. The Localization Preferences form displays a list of customizable page labels.
2. In the **Select language to customize** field, select a language for which you want to create customized labels.
3. Locate the labels you want to configure from the **Page** column.
4. In the **Custom Label** fields next to the page labels that you want to customize, enter a new page label.
5. Click **Save**. The page labels changes to the new custom labels.

Setting Up Fixed Billing Dates

You need to set up a fixed set of billing dates for the year to be used for subscriptions with a Fixed Date billing mode.

Fixed billing date determines the subscription cycle start and end dates for fixed date subscriptions.

When you enter subscription information on a sales transaction record through the Recurring Billing configurator and you select a subscription plan with a fixed date billing mode, a query is run against the Fixed Billing Dates list to find available billing dates in the period from the subscription start date until the end of the rating period. The Fixed Billing Date field on the Recurring Billing configurator shows billing dates found within the period and associated with the specified rating frequency.

To specify a fixed billing date:

1. Go to Subscription Billing > Account Setup > Fixed Billing Dates > New.
2. Select a day of the year to perform billing.
3. Select rating frequencies to be associated with the specified billing date. To make the billing date available to all rating frequencies, check **Select All**.
4. Click **Save**.

> **Note:** You can set up more than one billing date per month. However, you cannot create duplicate dates.

To modify a fixed billing date record, go to Subscription Billing > Account Setup > Fixed Billing Dates and edit the fixed billing date record that you want to modify. To make a billing date unavailable, check the **Inactive** box on the fixed billing date record.

For more information on Fixed Date billing mode, see Fixed Date Billing.

Setting Up Recurring Billing Script Deployment Schedules

Upon installation of the Recurring Billing SuiteApp, you must specify your preferred schedule for the following Recurring Billing scheduler scripts. The scheduler script creates batch records of jobs to be processed, then it deploys its corresponding process script to process the batch records. For more information on Recurring Billing batch process implementation, see Multi-Queue Support for Recurring Billing Batch Processes.

> **Note:** For variable usage items to be rated correctly, the rating engine (REScheduler) must run before the billing engine (BEScheduler). Any usage imported after the rating is completed will not be included in the invoice. Late usage is currently ignored by the SuiteApp.

Script	Script Deployment	Description
SWV_SB_SS_REScheduler	SWV_SB_SS_REScheduler_Scheduled (customdeploy_sb_re_scheduler_sched)	Deploys the rating process script (SWV_SB_SS_CreateUsageBasedCharge) to generate charges from imported usage data for variable usage subscription items.
SWV_SB_SS_BEScheduler	SWV_SB_SS_BEScheduler (customdeploy_sb_be_scheduler)	Deploys the billing process script (SWV_SB_SS_BillTran) to generate invoices for subscriptions that are due for billing.
SWV_SB_SS_CCScheduler	SWV_SB_SS_CCScheduler_Scheduled (customdeploy_sb_cc_scheduler_sched)	Deploys the charge creation process script (SWV_SB_SS_CreateCharges) to generate charges past the minimum term and charges for term extension.

> **Warning:** Avoid creating custom deployments of the rating process script SWV_SB_SS_CreateUsageBasedCharge. Creating a custom deployment of SWV_SB_SS_CreateUsageBasedCharge while the other deployments triggered by the REScheduler script are still running may result to duplicate charges.

You should specify your preferred schedule for the following script which is scheduled by default.

Script	Script Deployment	Description	Default Schedule
SWV_SB_SS_TriggerSCOWorkflow	SWV_SB_SS_TriggerSCOWorkflow (customdeploy_sb_ss_triggerscoworkflow)	Executes pending subscription change orders.	Scheduled to run every 6 hours

To set the script deployment schedule:

1. Go to Customization > Scripting > Scripts.
2. Click the **Deployments** link for the script that you want to set a schedule for.
3. Edit the script deployment record. For the REScheduler and CCScheduler scripts, make sure to edit the deployment record labeled “Scheduled”.
4. Specify your preferred schedule on the **Schedule** subtab.

   > **Note:** The dates you specify in the script deployment schedule follows the user preference time zone.

5. Make sure that the **Deployed** box is checked and the status is set to **Scheduled**.

   > **Note:** Do not specify values on the **Parameters** subtab of the scheduled deployment records for REScheduler and CCScheduler. The fields on the **Parameters** subtab must be used only for on-demand (manual) runs where you need to identify specific records to be processed. For more information, see Manually Running Batch Processes.

6. Click **Save**.

For more information on script deployment schedule, read the following help topics:

- Overview of Scheduled Script Topics

- When Will My Scheduled Script Execute?
- Submitting a Script for Processing
- Using nlapiScheduleScript to Submit a Script for Processing
- Scheduled Scripts on Accounts with Multiple Processors (SuiteCloud Plus)
- Scheduled Script Best Practices

Setting Up Recurring Billing Items and Plans

Before you can create subscriptions, you need to set up the subscription items and plans that you will use in the subscription.

Read the following topics for more information:

- Setting Up Subscription Items
- Setting Up Rate Plans
- Setting Up Billing Plans
- Setting Up Charge Plans
- Setting Up Subscription Categories
- Setting Up Subscription Plans

Setting Up Subscription Items

Recurring Billing supports the following item types:

- Non-inventory Item – For Sale or For Resale
- Service – For Sale or For Resale
- Inventory Item

> **Note:** The current version of the Recurring Billing SuiteApp supports the use of inventory items only as lead items in subscription plans. Non-inventory items used as secondary subscription items in subscriptions must not be converted to inventory items.
>
> To use inventory items, the Inventory feature must be enabled. Lot numbered and serialized inventory items are not supported.

For information on creating item records, see the help topic Creating Item Records.

To set up subscription items, go to the Subscription Billing subtab of the item record.

- **Product Line** – Select a product line if you want to associate the item to a product line. To set up product line records, see Setting Up Product Lines.
- **Requires Subscription Plan** – Check this box to enable items for subscription plans. When enabled, you can only use the item as part of a sales transaction to deliver a subscription service or product to a customer.

> **Note:** You can still include an item in a subscription plan even if the **Requires Subscription Plan** box is not checked. For example, you can include a non-recurring item such as a cellphone unit as part of a subscription plan together with other recurring services such as voice call minutes and text messages.

For information on adding subscriptions items to a subscription plan, see Setting Up Subscription Plans.

Enabling Revenue Recognition on a Subscription Item

If you use the Revenue Recognition feature, you can associate a subscription item with a revenue recognition template and a deferred revenue account that uses standard or custom recognition methods. The Revenue recognition feature enables you to record the general ledger impact of sales transactions across multiple future periods. For more information, see the help topic Using Revenue Recognition.

> **Note:** Revenue Commitments and Vendor-Specific Objective Evidence (VSOE) is currently not supported in the Recurring Billing SuiteApp.

To enable Revenue Recognition on a subscription item:

1. Go to Lists > Accounting > Items.
2. Click **Edit** next to an item.
3. Click the **Accounting** subtab, and select an account in the **Deferred Revenue Account** field.

   This field must be populated for revenue recognition to be available for an item on transactions.
4. Click the **Revenue Recognition / Amortization** subtab, and select a template in the **Revenue Recognition Template** field.
5. Click **Save**.

The item is associated with the revenue recognition template and the item defaults to use the template when it is sold. You can change the revenue recognition template on individual transaction lines as needed.

Setting Up Product Lines

Product lines enable you to group related subscription plans, specifically those with similar maintenance and support offerings.

This feature enables you to do the following:

- Create product line records. To do this, go to Subscription Billing > View Records > Product Lines > New.
- In the item record, specify to which product line an item belongs. See Setting Up Subscription Items.
- Associate subscription plans to a specific product line and choose which subscription plan items are available to that product line. See Setting Up Subscription Plans.

When you create a subscription sales transaction and select a line item that is associated with a product line, the Subscription Plan field on the Recurring Billing configurator shows subscription plans where the line item is the lead item and subscription plans with the same product line as the line item. For more information, see Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator).

> **Note:** Product line is not yet supported in the Add Subscription Item change order. This feature is currently only supported when using the Recurring Billing configurator on the standard sales order, opportunity, and estimate forms.

Setting Up Rate Plans

A rate plan is a template which defines the pricing of a component of a subscription plan item.

The following high-level sample steps describe the workflow phases of a rate plan:

1. A Marketing Analyst creates (prepares) a rate plan.

2. A Marketing Analyst requests approval of the rate plan by setting the status of the rate plan to Request Approval.
3. A Marketing Manager either approves or rejects the rate plan. The Marketing Manager can edit the rate plan before approval or rejection.
4. If approved, a rate plan becomes available on the set effective date. Alternatively, a user can manually set the rate plan to Available. Only rate plans with an available status can be attached to a subscription plan item.

   If rejected, the rate plan becomes unavailable.

Review the following topics for more information about the rate plan workflow and how to set up a rate plan:

- Setting Up Rate Plan Components
  - Creating a Usage Unit
  - Creating a Rating Filter
  - Creating a Display Filter
- Creating a Rate Plan
- Managing Rate Plans
  - Editing a Rate Plan
  - Requesting Approval of a Rate Plan
  - Approving or Rejecting a Rate Plan
  - Making an Approved Rate Plan Available
  - Making an Available Rate Plan Unavailable
  - Making an Unavailable Rate Plan Available
  - Setting a Rejected Rate Plan to Prepare Status
  - Making a Copy of a Rate Plan

Setting Up Rate Plan Components

For rate plans that will be used for usage-based items, you need to create the records that you will select in the following fields:

Rate Plan Field	Description
Usage Unit Filter	Unit of measure for usage data. For more information, see Creating a Usage Unit.
Rating Filter	Saved search used to aggregate usage data before it is processed by the billing system. For more information, see Creating a Rating Filter.
Display Filter	Saved search applied to usage data and used to display subscription items on charge record and invoices. For more information, see Creating a Display Filter.

Creating a Usage Unit

A Usage Unit is a unit of measure for usage data. Examples of a usage unit include dollar, minutes, text, trucks, and alarm. You must create usage units before creating rate plans. You will be asked to select a usage unit when creating rate plans.

To create a usage unit:

1. Go to Subscription Billing > View Records > Usage Unit > New.

2. In the **Name** field, enter a name for the usage unit.
3. Check the **Inactive** box if you want to set the status of the usage unit to inactive.

   When you mark a usage as inactive, the record is not available for use by the billing system. However, the record remains in the system for future reference.
4. Click **Save**.

Creating a Rating Filter

Rating filters are saved search based user rules that are used to aggregate usage data before they are processed by the billing system. Rating filters transform usage data based on the user rules of the filter type selected on the rate plan.

When selected on a rate plan, the search criteria of a rating filter is used in addition to the selected Default Usage Search Criteria on the Subscription Billing Preferences page to aggregate and rate the usage data. The result columns on the filter should all have a Summary Type and when the search is executed, the result should be a single record. This means that you can only group result columns that will return the same values based on the specified search criteria. For more information on setting up the Default Usage Search Criteria, see Setting Up Recurring Billing Preferences.

You need to create rating filters before you can select them from the Rating Filter field on a rate plan. For more information about setting rating filters, see Creating a Rate Plan.

To create a rating filter saved search:

1. Go to List > Search > Saved Searches > New.
2. From the New Saved Search list, click **Usage Data**.
3. Define the search criteria for the rating filter. For more information, see the help topic Defining a Saved Search.

   > **Note:** Make sure that the saved search is set to public. For more information, see the help topic Making Saved Searches Public.

   > **Important:** Make sure that your search criteria picks up a usage data only one time. The billing system will process duplicate results of usage data from rating filters.
4. Click **Save**.

Creating a Display Filter

Display filters are user rules based on saved searches that are applied to usage data and used to display the subscription items on the invoice and charge record. For example, you can display a breakdown of the assessed usage data charges and cost by department on the invoice and charge record so that your customer can understand how the effective charge was determined.

When selected on a rate plan with a rating filter, the search criteria on the display filter should be the same as the search criteria on the rating filter so that the records that are aggregated and rated are the same types of records that will be shown as line items on the invoice and charge record.

You need to create display filters before you can select them from the Display Filter field on a rate plan. For more information on about setting display filters, see Creating a Rate Plan.

To create a display filter saved search:

1. Go to List > Search > Saved Searches > New.
2. From the New Saved Search list, click **Usage Data**.
3. Define the search criteria for the display filter. For more information, see the help topic Defining a Saved Search.

On the **Results** subtab, set the **Summary Type** to **Group** for each of the result columns.

> **Note:** Make sure that the saved search is set to public. For more information, see the help topic Making Saved Searches Public.

4. Click **Save**.

Creating a Rate Plan

A rate plan is a template which defines the pricing components of a subscription plan.

To create a rate plan:

1. Go to Subscription Billing > View Records > Rate Plans > New.
2. Enter the following information in the Rate Plan form header fields:

Field Name	Description
Name	Enter a name for the rate plan.
Effectivity Date	Specify a date when the rate plan becomes available. You can manually make a rate plan available. For more information, see Making an Approved Rate Plan Available. **Note:** A rate plan needs to be approved before it can be made available. For more information, see Approving or Rejecting a Rate Plan.
End Date	Select a date after which the rate plan can no longer be used by a subscription item.
Rating Model	Select the type of rating model that will be used by the rate plan. ▪ **Flat Rate Pricing** – Charge is not divided into tiers with different rates or prices. ▪ **Tiered Pricing** – Charge is divided into tiers and applies different rates or prices to each tier. The charges for all applicable tiers are summed to get the total charge amount. ▪ **Volume Pricing** – Charge is computed based on the rate or price for the tier where the rated quantity falls.
Currency	In accounts with enabled Multiple Currencies feature, select the currency that will be used in computing the price of the item to which the rate plan will be applied.
Supervisor Approval	Check this box if you want to skip the rate plan approval process. Upon saving, the rate plan will be created with a status of Available or Approved, depending on the effective date that you specified. This option is available only to Recurring Billing roles with a rate plan approve permission. For more information, see Roles and Permissions for Recurring Billing
Minimum Charge	Specify a minimum charge for the rate plan.
Maximum Charge	Specify a maximum charge for the rate plan.
Usage	Check this box if this rate plan will be used for usage-based items. The fields on the Usage Information section are enabled when this box is checked.
Unit of Measure	In accounts with enabled Multiple Units of Measure feature, you can select a unit of measure that you want to associate with the rate plan. For more information on units of measure, see the help topic Multiple Units of Measure.

Field Name	Description
	Note: When you set up a subscription plan item and the item that you selected has an assigned units type, the **Rate Plan** field shows rate plans with a unit of measure belonging to that units type and rate plans with no unit of measure. If the item has no units type, only rate plans with no unit of measure are shown in the **Rate Plan** field on the subscription plan item record.
Included Usage	Enter the number of usage units that will not be charged.
Service Filter	Select whether the rate plan will be applied to the usage data of a single subscription or to the usage data of a collection of customer subscriptions. ▪ **This Subscription Only** - Select this option to apply the rate plan to the usage data of single subscriptions. ▪ **Include all Customer Subscriptions** - Select this option to apply the rate plan to the usage data of all subscriptions of a single customer. ▪ **Include Sibling Customer Subscriptions** - Select this option to apply the rate plan to the usage data of all subscriptions of a customer and all other customers in the same level within a customer hierarchy. ▪ **Include Child Customer Subscriptions** - Select this option to apply the rate plan to the usage data of all subscriptions of a customer and all its child customers within a customer hierarchy. **Note:** Sibling aggregation is applicable only to if the rating model is Volume Pricing.
Rating Filter	Select a saved search that will be used by the rate plan to filter usage data to be aggregated and rated. Rating filters are user-defined rules based on saved searches. Examples include eliminating usage records or excluding records that fall outside a defined usage cap. For more information about rating filters, see Creating a Rating Filter. **Note:** Leave this field blank if you are using the rate plan for fixed usage items.
Display Filter	Select a saved search that will be used by the rate plan for displaying usage-based line items in the subscription invoice or charge record. For more information about display filters, see Creating a Display Filter. **Note:** Leave this field blank if you are using this rate plan for fixed usage items.
Usage Unit Filter	Select the usage unit that will be used by the rate plan. A usage unit is a unit of measure for usage data. Examples include dollar, minutes, text, trucks, and alarm. For information on how to set up usage units, see Creating a Usage Unit.
Show Tier Breakdown	Check this box to display the usage unit details for the item on the **Rating Details** field of invoice lines and charge records. For more information, see Rating Details on a Subscription Invoice.

Field Name	Description
	Note: If a display filter is specified and the **Show Tier Breakdown** box is checked, the rating details will be shown for each apportioned charge that is created based on the display filter grouping. The **Filter Details** column on the charge record shows how the results are grouped. This field is not available if you selected **Flat Rate Pricing** in the **Rating Model** field.
Historical Data Sets Rate	Check this box if you want to calculate the rate based on current usage within the current period with the addition of historical usage. This option is available only when the rating model is Volume Pricing or Tiered Pricing and if the service filter is set to blank or This Subscription Only. **Note:** Leave this field blank if you are using this rate plan for fixed usage items.

3. On the **Usage Rates** subtab:
   - If you selected **Flat Rate Pricing** rating model, enter a single rate in the **Rate** column.
   - If you selected **Tiered Pricing** or **Volume Pricing** rating model, specify values for the following columns for each tier that you add:

Column	Description
Usage Tier Name	Enter a name for the tier.
Start Value	Specify a start value.
Rate	Specify a rate.
Pricing Option	Select a pricing option. - **Rate** – Value in the Rate field is used as rate. Charge amount for the tier is computed by multiplying the rate and usage quantity for the tier. - **Price** – Value in the Rate field is used as price or the actual charge for the tier.
Min Price	Specify a minimum price. This field is available only when the pricing option is **Rate**.
Max Price	Specify a maximum price. This field is available only when the pricing option is **Rate**.

> **Note:** The tier threshold (Min Price and Max Price) is applied to the charge amount for the corresponding tier while the charge threshold (Minimum Charge and Maximum Charge) is applied to the total charge amount (that is, sum of all tier charge amounts).

4. If the **Historical Data Sets Rate** box is checked, enter the following information on the **Historical Data Range** subtab:

Historical Mode	Select one of the following options: - **Use all usage** – Select this option if you want the billing system to include all existing usage data in the calculation for determining the volume price or rate.

	■ **Use periods** – Select this option if you want the billing system to include the historical usage based on the relative time frame in reference to the current billing cycle as part of the calculation for determining the volume price or rate. ■ **Use custom date** – Select this option if you want the billing system to include the historical usage within a custom date range set by the user as part of the calculation for determining the volume price or rate. Enter the start and end of the date range on the **Historical Date From** and the **Historical Date To** fields.
Historical Date From	Enter the start date of the custom date range from which the billing system will retrieve historical data usage as part of the calculation for determining volume price or rate. **Note:** This option is available only if you selected **Use custom date** in the **Historical Mode** field.
Historical Date To	Enter the end date of the custom date range from which the billing system will retrieve historical data usage as part of the calculation for determining volume price or rate. **Note:** This option is available only if you selected **Use custom date** in the **Historical Mode** field.
Periods	Select which period will be included in the historical data set. ■ **First** – Select this option if you want the billing system to review usage in the first set of periods defined by the user as the historical data set. ■ **Last** – Select this option if you want the billing system to review usage in the previous set of periods defined by the user as the historical data set. ■ **Annual** – Select this option if you want the system to review historical usage within a year as part of the historical data set. **Note:** This option is available only if you selected **Use periods** in the **Historical Mode** field.
Annual Option	If you selected **Annual** in the **Periods** field, select if you want the billing system to retrieve the annual historical data starting on the date when the subscription item started or starting from January of the current year.
Number of Periods	Enter the number of periods that will be included in the historical data set. **Note:** This option is available only if you selected **Use periods** in the **Historical Mode** field.
Type of Periods	Select a period type for the historical data set. **Note:** This option is available only if you selected **Use periods** in the **Historical Mode** field.

5. Click **Save**. The Rate Plan is created with an initial status of Prepare. If the **Supervisor Approval** box is checked, the rate plan status is set to Available or Approved upon saving.

Note: Newly created rate plans must be approved before they are used. For more information, see Requesting Approval of a Rate Plan and Approving or Rejecting a Rate Plan.

Managing Rate Plans

- Editing a Rate Plan

Editing a Rate Plan

You can edit a rate plan that is not used by a subscription plan.

> **Note:** Updating rate plans using CSV import is currently not supported.

Rate plans can be edited by Recurring Billing roles with edit and approve permission, such as an SB Marketing Manager. For roles with only an edit permission, such as an SB Marketing Analyst, only rate plans with a status of Prepare, Rejected, or Inactive can be edited.

To edit an unused rate plan:

1. Go to Subscription Billing > View Records > Rate Plan.
2. From the rate plan list, click **Edit** next to the rate plan that you want to edit. You can edit any rate plan, regardless of its status, if it is not used by a subscription plan.
3. Edit the rate plan, as needed.
4. For roles with a rate plan approve permission, check the **Supervisor Approval** box if you want to skip the rate plan approval process.

   If this box is checked, the rate plan status is set to Available or Approved upon saving. If this box is not checked, the rate plan status is set back to Prepare upon saving.
5. Click **Save**.

If the rate plan's status is set back to Prepare, you must request for its approval before it can be used. For more information, see Requesting Approval of a Rate Plan.

Requesting Approval of a Rate Plan

After creating a rate plan, a user can request for its approval. The rate plan can only be made available after it is approved.

To request approval of a rate plan:

1. Log in using a role with a rate plan create permission. For example, an SB Marketing Analyst or SB Marketing Manager.
2. Go to Subscription Billing > View Records > Rate Plan.
3. From the Rate Plan list, click **View** next to the rate plan that you want to approve. The status of the rate plan should be Prepare.
4. Click **Request Approval**. The status of the rate plan changes to Pending Approval. An email notification is sent to the approver stating that a new rate plan is pending approval.

Approving or Rejecting a Rate Plan

After receiving a notification for a rate plan that is pending approval, a user with a rate plan edit and approve permission (such as a Subscription Marketing Manager) can approve or reject a rate plan. The approver can also edit the rate plan before approving or reject it.

To approve or reject rate plan:

1. Log in using a role with a rate plan edit and approve permission. For example, an SB Marketing Manager.
2. Go to Subscription Billing > View Records > Rate Plan.
3. From the Rate Plan list, click **Edit** next to the rate plan that you want to approve or reject. The status of rate plan should be Pending Approval.
4. Edit the rate plan, as needed.
5. Click **Approve** or **Reject**.
6. Click **Save**. The rate plan's status changes to Approved or Rejected.

   A role with a rate plan create permission can edit a rejected rate plan and set it back to Prepare state.

Making an Approved Rate Plan Available

An approved rate plan becomes available on the date set in the Effectivity Date field. You can manually make an approved rate plan available without setting an effective date or without waiting for the effective date to occur.

To manually make an approved rate plan available:

1. Go to Subscription Billing > View Records > Rate Plan.
2. From the Rate Plan list, click **View** next to the rate plan that you want to make available. The status of the rate plan should be Approved.
3. Click **Make Available**.
4. Click **Save**. When a rate plan is made available, you can associate the rate plan to a subscription plan item. For more information, see Setting Up Subscription Plan Items.

Making an Available Rate Plan Unavailable

To make an available rate plan to unavailable:

1. Go to Subscription Billing > View Records > Rate Plan.
2. From the Rate Plan list, click **View** next to the rate plan that you want to make unavailable. The status of the rate plan should be Available.
3. Click **Make Unavailable**.
4. Click **Save**. The status of the rate plan changes to Unavailable.

You cannot select a rate plan for a subscription plan item unless the rate plan status is Available. However, even if a rate plan is used in an approved subscription plan, you can set it to Unavailable (or Inactive) and it will have no effect on the existing subscription plan. The rate plan will be unavailable to new records, but the approved subscription plan retains the data from the rate plan even if it has been set to Unavailable (or Inactive).

Making an Unavailable Rate Plan Available

To make an unavailable rate plan to unavailable:

1. Go to Subscription Billing > View Records > Rate Plan.
2. From the Rate Plan list, click **View** next to the rate plan that you want to make available. The status of the rate plan should be Unavailable.
3. Click **Make Available**.
4. Click **Save**. The status of the rate plan changes to Available.

Setting a Rejected Rate Plan to Prepare Status

You can set a rejected rate plan back to a prepare state and consequently request for its approval.

To set a rejected rate plan to prepare status:

1. Go to Subscription Billing > View Records > Rate Plan.
2. From the Rate Plan list, click **View** next to the rejected rate plan that you want to set back to Prepare. The status of the rate plan should be Rejected.
3. In the **Effectivity Date** field, specify a new date when the rate plan becomes available.
4. Edit other fields, as needed.
5. Click **Save**. The status of the rate plan changes to Prepare.

Making a Copy of a Rate Plan

You can copy an existing rate plan to expedite the creation of a new rate plan.

To make a copy of a rate plan:

1. Go to Subscription Billing > View Records > Rate Plan.
2. From the Rate Plan list, click **View** next to the rate plan that you want to copy.
3. Click **Make Copy**. A new rate plan is created with the same values and options as the original rate plan.
4. In the **Name** field, enter a new name for the rate plan.
5. Enter values for the other fields, as needed. For more information, see Creating a Rate Plan.
6. Click **Save**.

Setting Up Billing Plans

A billing plan is a record which defines the commercial terms of a subscription including billing term, termination method, billing mode, and renewal options.

To set up a billing plan:

1. Go to Subscription Billing > View Records > Billing Plan > New.
2. Enter the following information in the Billing Plan form header fields:

Field Name	Description
Name	Enter a name for the billing plan.
Description	Enter a description for the billing plan.
Billing Mode	Select when you want the billing system to generate invoices for the item that will use the billing plan. The Recurring Billing SuiteApp follows two types of bill run schedules: ■ **Anniversary** – Select this option if you want the item to be billed on the day the customer signs up for the subscription. For more information, see Anniversary Billing. ■ **Fixed Date** – Select this option if you want the item to be billed on a specific billing date. For more information, see Fixed Date Billing.
Term	Select the number of months that the subscription item will be effective. Select **Perpetual** if the item has no expiration date and no renewal action is required. For more information on the renewal options of a billing plan, see Setting Up Renewal Options of a Billing Plan.
Minimum Term	Specify the minimum number of charges that will be created in advance for the subscription plan that will use this billing plan as template. This field is required if the term is more than 36 months.
Notice Period	Specify the period wherein new charges are created for the item in the subscription plan. The number specified represents the minimum number of future charges (relative to the current charge period) that must always be available for the item. This field is optional and only applicable if the term is more than 36 months. You can enter any positive integer from 1 to 120. If the **Notice Period** field is blank: ■ Upon creation of the subscription, the notice period is treated as having a value of zero. This means that the initial number of charges created only depends on the minimum term. ■ On the next run of the SWV_SB_SS_CCScheduler script, the notice period is treated as having a value of one. This means that there must always be at least one future charge available for the item. If the **Notice Period** field has a value: ■ Upon creation of the subscription, the initial number of charges created is equal to the value of the minimum term. At the same time, the number of charges created must also satisfy the condition set by the notice period. This means that if the initial number of charges created (based on the minimum term) is less than the value of the notice period, new charges will be created to meet the required number of future charges based on the notice period. ■ On the next run of the SWV_SB_SS_CCScheduler script, it will verify if the number of future charges available for the item is equal to the value specified for the notice period. If the number of future charges available is less than the value of the notice period, a new charge will be created to maintain the required number of future charges based on the notice period. **Example:** A subscription plan has a perpetual term, minimum term of 6 months, and notice period of 3. Its start date is January 1, 2014. Upon creation of the subscription, six charges (based on the minimum term) are created in advance on January 1, 2014.

Field Name	Description
	On the scheduled run of the SWV_SB_SS_CCScheduler script, it will verify if at least three future charges (based on the notice period) are available for the item. If at least three future charges are available, no new charges will be created. When SWV_SB_SS_CCScheduler runs in April, it will see that there are only two future charges left—the charge for May and June. It will then create the next charge for July so that three future charges are again available for the item. Only one new charge will be created every month after that to maintain the required three-period buffer based on the notice period.
Termination Method	Select when the termination of the subscription item becomes effective. ■ **End of the billing period** – Select this option if you want the subscription item to be terminated at the end of the billing period immediately following the date of the cancellation. ■ **Upon cancellation** – Select this option if you want the subscription item to be terminated on the day of the cancellation.
Inactive	Check this box if you want to make the billing plan record inactive. When you mark a billing plan as inactive, the record is not available for use by the billing system. However, the record remains in the system for future reference.
Co-Term	Select a default co-term option. Co-term enables you to align the end dates when adding items to existing subscriptions. For more information, see Co-termination.

3. Set up renewal options for subscription items on the **Renewal** subtab. For more information, see Setting Up Renewal Options of a Billing Plan.
4. Click **Save**.

Setting Up Renewal Options of a Billing Plan

Use the Renewal subtab on the billing plan to specify renewal options for subscription items upon its termination.

> **Note:** The fields under the **Renewal** subtab are disabled if the billing plan term is set to Perpetual. For more information, see Setting Up Billing Plans.

To set up subscription item renewal, specify values for the following fields on the Renewal subtab of the billing plan.

Field Name	Description
Renewal Action	Select a renewal action for the item that will use the subscription plan. ■ **Automatically Renew** – Select this option if you want to automatically renew the subscription item. ■ **Await Customer Acceptance** – Select this option if you want to renew the subscription item upon customer acceptance. ■ **Create Transaction** – Select this option if you want to create a renewal transaction for the subscription item. For information on how subscription items are renewed, see Renewing Items in a Subscription.
Term on Renew	Select the number of months that the renewal subscription item will be effective.
Minimum Term on Renew	Select the minimum number of charges that will be created in advance for the renewal subscription item. This field is required if the term on renew is more than 36 months.

Field Name	Description
Notice Period on Renew	Specify the period wherein new charges are created for the item. The number specified represents the minimum number of future charges (relative to the current charge period) that must always be available for the item. This field is optional and only applicable if the term on renew is more than 36 months. You can enter any positive integer from 1 to 120.
Transaction Type	Select the type of transaction that will be created for item renewal. This field is applicable only if the renewal action is set to **Create Transaction**.
Days in Advance	Specify the number of days before the renewal date when the renewal transaction will be created. Value must be between 0 and 30 days. A renewal transaction is created when the specified days in advance (that is, days before the renewal date) is reached, and the item is not renewed beforehand. If the value is set to zero, the renewal transaction will be created one day after the item end date (if a renewal is not made beforehand). This field is applicable only if the renewal action is set to **Create Transaction**.
Assign to	Select the sales person to whom the renewal transaction will be assigned. **Note:** Only employees with the Sales Rep option enabled on their employee records can be selected in this field. For more information, see the help topic Marking an Employee as a Sales Rep. This field is applicable only if the renewal action is set to **Create Transaction**.
Terminate Un-Renewed Subscription	Check this box if you want the billing system to automatically terminate the subscription item if the customer has not acted on the renewal notification after the number of days you specified in the **Days after Renewal Date** field has lapsed. This field is applicable only if the renewal action is set to **Await Customer Acceptance** or **Create Transaction**.
Days After Renewal Date	Specify the number of days after the renewal date when the subscription item will automatically be terminated if the customer has not acted on the renewal notification. If the value is set to zero, the subscription item will automatically be terminated one day after the subscription item end date. This field is applicable only if the renewal action is set to **Await Customer Acceptance** or **Create Transaction** and the **Terminate Un-Renewed Subscription** box is checked.

For more information on renewals, see Renewing Items in a Subscription.

Setting Up Charge Plans

A charge plan is a record which defines the elements of a subscription plan item that are related to how charges are calculated. You can use charge plans as a template for setting up predefined charge-related values of subscription plan items. It provides a way for the users to set up the elements for a set of related subscription plan items.

To set up a charge plan:

1. Go to Subscription Billing > View Records > Charge Plan > New.
2. Enter the following information in the Charge Plan form header fields:

Field Name	Description
Name	Enter a name for the charge plan.

Field Name	Description
Charge Type	Select the type of service for the subscription plan items that will use this charge plan. The billing system applies different charge calculations for different types of subscription items. ■ Select **Recurring Service** for recurring items. ■ Select **Variable Usage** for usage-based items with usage amounts that may vary per rating period. ■ Select **Fixed Usage** for usage-based items with fixed usage amounts. ■ Select **Termination Fee** for items that are used as line entries for early termination penalties/charges.
Billing Method	Select a billing method for the item. ■ **Advance** – Select this option if you want to bill the item on the first day of the billing cycle. ■ **Arrears** – Select this option if you want to bill the item after the end of the billing cycle.
Allow Line Discount	Check this box if you want to allow line discounting for the items that will use this charge plan. When this option is checked, you can specify a percentage discount for the item when you add it on a sales transaction record or when you modify it through a change order. For more information, see Custom Pricing. When a discount is applied, it reduces the charge amount of the secondary subscription plan item by the percentage specified on the sales transaction or change order.
Allow Custom Rate	Check this box if you want to allow specifying a custom rate for the items that will use this charge plan. When this option is checked, you can specify a new rate for the item when you add it on a sales order or when you modify it through a change order. For more information, see Custom Pricing.
Allow Item Uplift	Check this box if you want to allow price uplift for the items that will use this charge plan. When this option is checked, you can specify a percentage uplift for the item through a change order. For more information, see Custom Pricing. When an uplift is applied, it increases or decreases the charge amount of the secondary subscription plan item by the percentage specified on the change order.
Inactive	Check this box if you want to make the charge plan record inactive. When you mark a charge plan as inactive, the record is not available for use by the billing system. However, the record remains in the system for future reference.

3. On the Proration Options section of the form, select which type of proration to apply.

   The Recurring Billing SuiteApp supports two types of proration—proration on sale and proration on termination.

   Proration can be applied on sale when the start date of a subscription item is not aligned with the dates of the billing cycle. For example, if a subscription item is entered on January 15 for a plan that is billed on the 30th of each month, only the charges for January 15 to January 30 will be reflected on the invoice. Proration on sale can also be applied to included usage units. For more information on included usage, see Creating a Rate Plan.

   Proration can be applied on termination when the termination date of a subscription item is not aligned with the dates of the billing cycle. For example, if a plan that is billed on the 30th of each month is terminated on December 15, only the recurring charges for December 1 to December 15 will be reflected on the invoice. Proration on termination can also be applied to included usage units. For more information on included usage, see Creating a Rate Plan.

Field Name	Description
Prorate Fee on Sale	Check this box if you want to apply proration on new recurring service and fixed usage subscription items that use this charge plan.
Prorate Fee on Termination	Check this box if you want to apply proration on termination fee subscriptions items that use this charge plan. This option also applies proration to fixed usage and recurring service items with a termination method set to Upon Cancellation.
Prorate Included Usage on Sale	Check this box if you want to apply proration on the included usage of new variable usage subscriptions items that use this charge plan. This field is not applicable to recurring service, termination fee, and fixed usage items.
Prorate Included Usage on Termination	Check this box if you want to apply proration on the included usage of terminated variable usage subscription items that use this charge plan. This field is not applicable to recurring service, termination fee, and fixed usage items.

Note: If the **Prorate Included Usage** options are enabled on the subscription plan item that will use this charge plan, the usage rate is computed by first prorating the quantity or the actual usage (fixed or variable) and then subtracting the prorated included usage from that amount.

Charges for prorated fixed usage items that will use this charge plan are calculated based on the price of the item for the full rating period multiplied by the ratio between the actual number of days the item has been active within the rating period and the total number of days in the rating period.

For example, if an item, such as a software license, has only been active for 21 days out of a total of 28 days in a particular rating period, and the price for the full rating period for the license is $42, the effective rate will be reduced to $31.50 ($45 x 21/28) for the prorated rating period.

You can specify a custom proration formula on the **Rating Defaults** subtab of the Subscription Billing Preferences page. This proration formula is used by the rating engine as the multiplier for rate when creating charges. For more information, see Setting Up Recurring Billing Preferences.

4. Click **Save**.

Setting Up Subscription Categories

Subscription categories and sub-categories provide a way to tag similar subscription components across plans even if the items are different.

To create a new category or sub-category:

1. Go to Subscription Billing > View Records > Subscription Category > New.
2. In the **Name** field, enter a name for the category or sub-category.

Note: The category name must be unique.

3. If you are creating a sub-category, select a category in the **Parent** field. If you are creating a category, leave the **Parent** field blank.

> **Note:** A sub-category can only be linked to one category. However, a category can have multiple sub-categories under it.

4. If necessary, add a user note in the table provided and click **Add**.
5. Click **Save**.

To modify a category or sub-category:

> **Note:** The subscription category record can only be modified if the category/sub-category is not yet used in a subscription plan or subscription item.

1. Go to Subscription Billing > View Records > Subscription Category.
2. Edit the subscription category or sub-category.
   - To move a sub-category under a different category, select a different category in the **Parent** field.
   - To add a new user note, click **New Note**. Enter the note details and click **Save**.
   - To make the category or sub-category inactive, check the **Inactive** box.
3. Click **Save** to apply your changes.

When you have set up subscription categories and sub-categories, they become available in the Category and Sub-category fields of the Subscription Plan Item form. You can group similar subscription components by tagging them under the same category and sub-category. Tagging items under the same category enables you to determine an upsell or downsell when migrating items to a new plan.

To tag new subscription plan items under a category and sub-category, see Setting Up Subscription Plan Items.

To tag existing available subscription items or subscription plan items under a category and sub-category, see Tagging Item Records under a Category using Mass Update.

Tagging Item Records under a Category using Mass Update

You can define and perform mass updates on existing available subscription item or subscription plan item records to tag them under the same category and sub-category.

To define a mass update of existing available item records:

1. Go to Lists > Mass Update > Mass Updates.
2. Click **Custom Updates** to expand.
3. Click **SWV_SB_MU_SubscriptionCategory** under Subscription Item or Subscription Plan Item, depending on the type of record that you intend to update.
4. In the **Title of Action** field, enter a name for the mass update action.
5. Select a category and sub-category for the items included in this mass update.
6. Enter values on the **Criteria**, **Results**, **Audience**, and **Schedule** subtabs as you would in a standard mass update. For more information, see the help topic Defining a Mass Update.

> **Note:** To view or edit a saved mass update, go to List > Mass Update > Saved Mass Updates.

Setting Up Subscription Plans

A subscription plan is a template that defines the characteristics of a subscription that is sold to a customer.

A subscription plan can be created using a billing plan template. For more information about billing plans, see Setting Up Billing Plans.

An approved subscription plan is referenced in the opportunity, estimate, and sales order that creates the corresponding subscription record. For more information, see the following help topics:

- Entering a Subscription Opportunity
- Entering a Subscription Estimate
- Entering a Subscription Sales Order
- Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator)

To set up a subscription plan:

1. Go to Subscription Billing > View Records > Subscription Plan > New.
2. Enter values in the following Subscription Plan form header fields:

Field Name	Description
Template	Select a billing plan to use as template for the subscription plan components. The subscription plan fields are automatically populated with the values from the billing plan that you select. For more information, see Setting Up Billing Plans.
Name	Enter a unique name for the subscription plan.
Lead Item	Select a lead item for the subscription plan. If you specify a lead item, this subscription plan will be available for selection when the lead item is selected as a line item on a sales transaction. For more information, see Creating Subscriptions. You can select a non-inventory item for sale or resale, a service for sale or resale, or an inventory item as a lead item. You can select a lead item that is not a subscription item component of the subscription plan. **Note:** You can use either a lead item or a product line when creating a subscription plan, but you cannot specify values for both fields.
Product Line	Select a product line if you want to associate this subscription plan to product line instead of a lead item. If you specify a product line, this subscription plan will be available for selection when any item that belongs to that product line is selected as a line item on a sales transaction. For more information, see Creating Subscriptions. For information on product lines, see Setting Up Product Lines. **Note:** You can use either a lead item or a product line when creating a subscription plan, but you cannot specify values for both fields. Renewal and plan migration are currently not supported for subscription plans that are linked to a product line.
Start Date	Enter the date when this subscription plan becomes effective.
End Date	Enter the date when this subscription plan will be terminated.
Subsidiary	Select the subsidiary to which transactions from subscriptions that will use this subscription plan will be posted. **Note:** Subsidiaries are available only in the OneWorld version of NetSuite.
Default	Check this box if you want to make this subscription plan the default subscription plan for the lead item.

Field Name	Description
	When this box is checked, this subscription plan is automatically selected in the **Subscription Plan** field of the Recurring Billing configurator if you select the lead item on a sales transaction item list.
Billing Mode	Select when you want the billing system to generate invoices for the item that will use this subscription plan. The Recurring Billing SuiteApp follows two types of bill run schedules: ■ **Anniversary** – Select this option if you want the item to be billed on the day the customer signs up for the subscription. For more information, see Anniversary Billing. ■ **Fixed Date** – Select this option if you want the item to be billed on a specific billing date. A fixed set of billing dates for the year must be defined in the Fixed Billing Dates list. For more information, see Fixed Date Billing.
Currency	Select the currency that will be used by the subscription that will use this subscription plan.
Term	Select the number of months that the subscription item will be effective. Select **Perpetual** if the item has no expiration date and no renewal action is required. For more information on renewal options of a subscription plan, see Setting Up Renewal Options of a Subscription Plan.
Minimum Term	Specify the minimum number of charges that will be created in advance for the subscription plan. This field is required if the term is more than 36 months.
Notice Period	Specify the period wherein new charges are created for the item in the subscription plan. The number specified represents the minimum number of future charges (relative to the current charge period) that must always be available for the item. This field is optional and only applicable if the term is more than 36 months. You can enter any positive integer from 1 to 120. If the **Notice Period** field is blank: ■ Upon creation of the subscription, the notice period is treated as having a value of zero. This means that the initial number of charges created only depends on the minimum term. ■ On the next run of the SWV_SB_SS_CCScheduler script, the notice period is treated as having a value of one. This means that there must always be at least one future charge available for the item. If the **Notice Period** field has a value: ■ Upon creation of the subscription, the initial number of charges created is equal to the value of the minimum term. At the same time, the number of charges created must also satisfy the condition set by the notice period. This means that if the initial number of charges created (based on the minimum term) is less than the value of the notice period, new charges will be created to meet the required number of future charges based on the notice period. ■ On the next run of the SWV_SB_SS_CCScheduler script, it will verify if the number of future charges available for the item is equal to the value specified for the notice period. If the number of future charges available is less than the value of the notice period, a new charge will be created to maintain the required number of future charges based on the notice period. **Example:** A subscription plan has a perpetual term, minimum term of 6 months, and notice period of 3. Its start date is January 1, 2014. Upon creation of the subscription, six charges (based on the minimum term) are created in advance on January 1, 2014.

Field Name	Description
	On the scheduled run of the SWV_SB_SS_CCScheduler script, it will verify if at least three future charges (based on the notice period) are available for the item. If at least three future charges are available, no new charges will be created. When SWV_SB_SS_CCScheduler runs in April, it will see that there are only two future charges left—the charge for May and June. It will then create the next charge for July so that three future charges are again available for the item. Only one new charge will be created every month after that to maintain the required three-period buffer based on the notice period.
Co-Term	Select a default co-term option. Co-term enables you to align the end dates of subscription plan items when upselling to existing subscriptions. For more information, see Co-termination.
Termination Method	Select when the termination of the subscription that will use this subscription plan becomes effective. ▪ **End of billing period** – Select this option if you want the subscription to be terminated at the end of the billing period immediately following the date of the cancellation. ▪ **Upon cancellation** – Select this option if you want the subscription to be terminated on the day of the cancellation.
Rating Frequency	This field is automatically set after you have entered subscription plan items and approved the subscription plan. When creating a subscription plan with multiple subscription plan items with different rating frequencies, the rating frequency of the subscription plan is based on the item with the least frequent rating period.

3. Set up renewal options for subscription items on the **Renewal** subtab. For more information, see Setting Up Renewal Options of a Subscription Plan.
4. Click **Save**.
5. Add subscription plan items to the subscription plan. On the **Plan Items** subtab, click **New Subscription Plan Item**. For more information, see Setting Up Subscription Plan Items.
6. After creating a subscription plan, its status is set to Prepare. You need to have a subscription plan approved before you can use it to create a subscription. To request for approval, click the **Request Approval** button.

You can edit subscription plans that are not used by a sales transaction, subscription, or change order. For more information, see Editing a Subscription Plan.

Setting Up Renewal Options of a Subscription Plan

Use the Renewal subtab on the subscription plan form to specify renewal options for subscriptions that will use the subscription plan.

> **Note:** The fields on the **Renewal** subtab are disabled if the subscription plan term is set to Perpetual or if the subscription plan is linked to a product line. For more information, see Setting Up Subscription Plans.

To set up subscription item renewal, specify values for the following fields on the Renewal subtab of the subscription plan.

Field Name	Description
Renewal Action	Select a renewal action for the item that will use the subscription plan. ▪ **Automatically Renew** – Select this option if you want to automatically renew the subscription item.

Field Name	Description
	■ **Await Customer Acceptance** – Select this option if you want to renew the subscription item upon customer acceptance. ■ **Create Transaction** – Select this option if you want to create a renewal transaction for the subscription item. For information on how subscription items are renewed, see Renewing Items in a Subscription.
Migrate on Renew	Check this box if you want to migrate the subscription item to a new subscription plan upon renewal.
Migrate To Subscription Plan	If the **Migrate on Renew** box is checked, select the new subscription plan to which the subscription item will be migrated upon renewal. This field shows approved and available subscription plans that have the same values as the original subscription plan for the following fields: ■ Lead Item ■ Billing Mode ■ Currency (if the Multiple Currency feature is enabled) ■ Termination Method ■ Subsidiary (for OneWorld version of NetSuite only)
Term on Renew	Select the number of months that the renewal subscription item will be effective. Select **Perpetual** if the renewed item will have no expiration date and no further renewal action is required. This field is applicable only if the renewal action is set to **Automatically Renew** or **Await Customer Acceptance**.
Minimum Term on Renew	Select the minimum number of charges that will be created in advance for the renewal subscription item. This field is required if the term on renew is more than 36 months.
Notice Period on Renew	Specify the period wherein new charges are created for the item in the subscription plan. The number specified represents the minimum number of future charges (relative to the current charge period) that must always be available for the item. This field is optional and only applicable if the term on renew is more than 36 months. You can enter any positive integer from 1 to 120.
Transaction Type	Select whether an opportunity, an estimate, or a sales order renewal transaction will be created for the subscription item. This field is applicable only if the renewal action is set to **Create Transaction**.
Days in Advance	Specify the number of days before the renewal date when the renewal transaction will be created. Value must be between 0 and 30 days. A renewal transaction is created when the specified days in advance (that is, days before the renewal date) is reached, and the item is not renewed beforehand. If the value is set to zero, the renewal transaction will be created one day after the item end date (if a renewal is not made beforehand). This field is applicable only if the renewal action is set to **Create Transaction**.
Assign to	Select the sales person to whom the renewal transaction will be assigned. **Note:** Only employees with the Sales Rep option enabled on their employee records can be selected in this field. For more information, see the help topic Marking an Employee as a Sales Rep. This field is applicable only if the renewal action is set to **Create Transaction**.
Days After Renewal Date	Specify the number of days after the renewal date when the subscription item will automatically be terminated if the customer has not acted on the renewal notification.

Field Name	Description
	If the value is set to zero, the subscription item will automatically be terminated one day after the subscription item end date. This field is applicable only if the renewal action is set to **Await Customer Acceptance** or **Create Transaction**.

For more information on renewals, see Renewing Items in a Subscription.

Setting Up Subscription Plan Items

A subscription plan includes one or more subscription plan items and their corresponding commercial elements. A subscription plan item corresponds to an item record. The same subscription plan item can appear multiple times in a subscription plan (normally segregated by date ranges). A subscription plan item can be created using a charge plan template. For more information, see Setting Up Charge Plans.

A subscription plan item is categorized into four types: Recurring Service, Fixed Usage, Variable Usage, and Termination Fee. Each item type is linked to one or more rate plans. For more information, see Setting Up Rate Plans. Recurring Service and Termination Fee items can only be linked to rate plans where the Usage option is not checked. Fixed and Variable Usage items can only be linked to rate plans where the Usage option is checked. Variable usage items can be linked to multiple rate plans within one subscription plan item.

To set up subscription plan items:

1. On the **Plan Items** subtab of the subscription plan record, click the **New Subscription Plan Item** button.
2. Enter values in the following Subscription Plan Item record fields.

Field Name	Description
Item	Select the item that will be sold as a subscription plan item within the subscription plan.
Subscription Plan	This field displays the name of the subscription plan where you are adding this subscription plan item.
Category	Select a category for the subscription plan item. Categories provide a way to tag similar subscription components across plans even if the items are different. For information on setting up categories, see Setting Up Subscription Categories.
Sub-category	Select a sub-category for the subscription plan item. For information on setting up sub-categories, see Setting Up Subscription Categories.
Subsidiary	This field displays the subsidiary (set at the subscription plan level) to which transactions of this subscription item will be posted. **Note:** Subsidiaries are available only in the OneWorld version of NetSuite.
Billing Method	Select a billing method for the item. ▪ **Advance** – Select this option if you want to bill the item on the first day of the billing cycle. ▪ **Arrears** – Select this option if you want to bill the item after the end of the billing cycle.
Billing Frequency	Select a time period when you want the billing system to generate an invoice entry for the item.

Field Name	Description
	The invoice entry for the item is added to the invoices generated for the subscription where the item belongs. For more information, see Invoicing.
Template	Select a charge plan to use as template for creating the subscription plan item. The subscription plan item fields are automatically populated with the values from the charge plan that you select. For more information, see Setting Up Charge Plans.
Charge Type	Select the subscription plan item type. The billing system applies different charge calculations for different types of subscription items. ■ Select **Recurring Service** for recurring items. ■ Select **Variable Usage** for usage-based items with usage amounts that may vary per rating period. ■ Select **Fixed Usage** for usage-based items with fixed usage amounts. ■ Select **Termination Fee** for items that are used as line entries for early termination penalties/charges.
Quantity	Enter the amount of fixed usage units to allocate to the subscription plan item per rating period. **Note:** This field is applicable only to fixed usage subscription items.
Include in TRA	Check this box if you want to include the amount of the item based on the rate plan to the total recurring amount. **Note:** This field is applicable only to recurring service subscription items.
Rate Plan	Select the rate plan that will be used to calculate the charges for the subscription plan item. To select multiple rate plans, press the Ctrl key on your keyboard while selecting rate plans from the list. If there are less than 50 rate plans for the selected charge type, the rate plan list is shown in one page. If there are more than 50 rate plans for the selected charge type, the rate plan list is divided into pages. The list is arranged alphabetically and shows 50 rate plans per page. Take note of the following: ■ To view other pages, click the page number or any of the navigation options at the bottom of the **Rate Plan** field. ■ Click **Unselect Plans** to remove your current rate plan selection. ■ Your selection is retained as you move through the other pages in the **Rate Plan** field. ■ Your selection will reset if you change the value in the **Charge Type** field from a non-usage charge type (Recurring Service or Termination Fee) to a usage charge type (Variable Usage or Fixed Usage), and vice versa. Multiple rate plans can be used in the following scenarios: ■ If variable usage items need to be rated using different plans based on a set criteria. For such a case, a rate plan can be used with a rating filter to rate variable usage components. ■ If the same item needs to be charged twice, but using different rates. Such a case applies to having a surcharge on top of a base charge. For more information on rate plans, see Setting Up Rate Plans.

Field Name	Description
	Note: If a units type is assigned to the item, this field shows rate plans with a unit of measure belonging to that units type and rates plans with no unit of measure. If the item has no units type, only rate plans with no unit of measure are shown. For more information on units of measure, see the help topic Multiple Units of Measure.
Rating Frequency	Select the frequency of the rating period. This value determines the period or frequency for the specified rate. You can set different rating and billing frequencies for recurring service items, provided they meet the following conditions: ▪ Billing frequency is less than or equal to the rating frequency (in months) ▪ Rating frequency is divisible by the billing frequency (without a remainder) **Note:** Setting different rating and billing frequencies for recurring service items enables you to define rates for a specific period (frequency) and bill the item on a different frequency. For example, if the rating frequency is yearly (12 months) and the billing frequency is quarterly (3 months) for an item with a rated charge of $1200, then four invoice entries are generated for the item, each for $300 and dated 3 months apart. The rating frequency is automatically set to the same value as the billing frequency for termination fee, variable usage, and fixed usage items. **Note:** Rating frequency must be less than or equal to the subscription plan term. Also, the subscription plan term must be divisible by the rating frequency.
Show Zero Amount	Check this box to include the subscription item on the invoice or cash sale even if the charge amount for the item is zero. **Note:** Invoice or cash sale with zero amount will be generated if the corresponding **Create Invoices/Cash Sales with 0.00 Amount** preference is checked and at least one of the items in the subscription has a checked **Show Zero Amount** box. For more information on Recurring Billing preferences, see Setting Up Recurring Billing Preferences.
Allow Line Discount	Check this box if you want to allow line discounting for this subscription plan item. When this option is checked, you can specify a percentage discount for the item when you add it on a sales transaction or when you modify it through a change order. For more information, see Custom Pricing. When a discount is applied, it reduces the charge amount of the secondary subscription plan item by the percentage specified on the sales transaction or change order.
Allow Custom Rate	Check this box if you want to allow specifying a custom rate for this subscription plan item. When this option is checked, you can specify a new rate for the item when you add it on a sales transaction or when you modify it through a change order. For more information, see Custom Pricing.
Allow Item Uplift	Check this box if you want to allow price uplift for this subscription plan item. When this option is checked, you can specify a percentage uplift for the item through a change order. For more information, see Custom Pricing.

Field Name	Description
	When an uplift is applied, it increases or decreases the charge amount of the secondary subscription plan item by the percentage specified on the change order.

3. On the Proration section of the Subscription Plan Item form, select which type of proration to apply.

   The Recurring Billing SuiteApp supports two types of proration—proration on sale and proration on termination.

   Proration can be applied on sale when the start date of a subscription item is not aligned with the dates of the billing cycle. For example, if a subscription item is entered on January 15 for a plan that is billed on the 30th of each month, only the charges for January 15 to January 30 will be reflected on the invoice. Proration on sale can also be applied to included usage units. For more information on included usage, see Creating a Rate Plan.

   Proration can be applied on termination when the termination date of a subscription item is not aligned with the dates of the billing cycle. For example, if a plan that is billed on the 30th of each month is terminated on December 15, only the recurring charges for December 1 to December 15 will be reflected on the invoice. Proration on termination can also be applied to included usage units. For more information on included usage, see Creating a Rate Plan.

Field Name	Description
Prorate Fee on Sale	Check this box if you want to apply proration on new recurring service and fixed usage subscription items.
Prorate Fee on Termination	Check this box if you want to apply proration on termination fee subscriptions items. This option also applies proration to fixed usage and recurring service items with a termination method set to Upon Cancellation.
Prorate Included Usage on Sale	Check this box if you want to apply proration on the included usage of new variable usage subscriptions items. This field is not applicable to recurring service, termination fee, and fixed usage items.
Prorate Included Usage on Termination	Check this box if you want to apply proration on the included usage of terminated variable usage subscription items. This field is not applicable to recurring service, termination fee, and fixed usage items.

> **Note:** If the **Prorate Included Usage** options are enabled on the subscription plan item, the usage rate is computed by first prorating the quantity or the actual usage (fixed or variable), and then subtracting the prorated included usage from that amount.
>
> Charges for prorated fixed usage items are calculated based on the price of the item for the full rating period multiplied by the ratio between the actual number of days the item has been active within the rating period and the total number of days in the rating period.
>
> You can specify a custom proration formula on the **Rating Defaults** subtab of the Subscription Billing Preferences page. This proration formula is used by the rating engine as the multiplier for rate when creating charges. For more information, see Setting Up Recurring Billing Preferences.

4. On the Period section of the Subscription Plan Item form, specify values for the following fields.

Field Name	Description
Offset	Enter the number of rating periods from the subscription start date when the subscription item starts. For example, if a subscription plan with a monthly rating frequency has a start date of January 1 and you enter **2** as the offset value for one of its component items, the start date of that item will commence only after 2 rating periods from the subscription start date has elapsed. In this case, the item's start date will be set to March 1. The start date of the subscription plan item will follow the start date of the subscription plan if you leave the offset value to its default setting of **0**.
Duration	Enter the number of rating periods that the subscription plan item is active. For example, if a subscription plan with a monthly rating frequency has a term of 12 months and you entered **6** as the duration value for one of its component items, that item will be effective only for 6 months within the 12 month term of the subscription plan. The start and end dates for that item depends on the values you entered in the **Offset** and **Duration** fields.
Unit	This field specifies the unit for the **Offset** and **Duration** fields. **Note:** The Recurring Billing SuiteApp currently only supports **Rating Period** as the unit for the offset and duration settings of a subscription plan item. The SuiteApp will be updated to support other types of units.

5. Click **Save**. The subscription plan item is added to the Plan Items list of the subscription plan.

Editing a Subscription Plan

You can edit subscription plans that are not used in a sales transaction, subscription, or plan migration.

> **Note:** Inline editing and updating subscription plans using CSV import are not supported.

Subscription plans can be edited by Recurring Billing roles with edit and approve permission, such as an SB Marketing Manager. For roles with only an edit permission, such as an SB Marketing Analyst, only subscription plans with a status of Prepare, Rejected, or Inactive can be edited.

The following table shows which subscription plans can be edited.

	Editing Allowed?						
Subscription Plan Status	**Prepare**	**Pending Approval**	**Approved**	**Rejected**	**Available**	**Unavailable**	**Inactive**
Not used in a sales transaction or subscription	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Not used in a Migrate Subscription Plan change order Was used in a Migrate Subscription Plan change order, but the change order was canceled	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Not used in another subscription plan’s renewal option (Migrate on Renew)	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Used in a sales transaction or subscription, regardless of the sales transaction or subscription status	—	—	—	—	No	—	—

	Editing Allowed?						
Used in a Migrate Subscription Plan change order (any change order status except canceled)	—	—	—	—	No	No (assuming it was used with an available status and then set to Unavailable)	No (assuming it was used with an available status and then set to Inactive)
Used in another subscription plan's renewal option (Migrate on Renew), regardless of the status of the subscription plan using it	—	—	—	—	No	No (assuming it was used with an available status and then set to Unavailable)	No (assuming it was used with an available status and then set to Inactive)

To edit an unused subscription plan:

1. Go to Subscription Billing > View Records > Subscription Plan.
2. From the subscription plan list, click **Edit** next to the subscription plan that you want to edit.
3. Edit the subscription plan, as needed.
4. For roles with a subscription plan approve permission, check the **Supervisor Approval** box if you want to skip the subscription plan approval process. If this box is checked, the subscription plan status is set to Available or Approved upon saving. If this box is not checked, the subscription plan status is set back to Prepare upon saving.
5. Click **Save**.

Note: Clicking the Edit button and saving the subscription plan without any changes will still set the subscription plan's status to Prepare (unless the Supervisor Approval box is checked).

If the subscription plan's status is set back to Prepare, you must request for its approval before it can be used. Click the **Request Approval** button to request for approval.

Creating Subscriptions

A subscription is created from an approved subscription sales order. The Recurring Billing SuiteApp supports the use of the standard NetSuite sales order form to create subscriptions. The Recurring Billing feature is available through a popup configurator.

You can also create a subscription opportunity or estimate during negotiations, which you can later convert to a subscription sales order when the order is accepted by the customer. The Recurring Billing configurator is also available on the standard NetSuite opportunity and estimate forms.

If you are new to NetSuite, we recommend that you familiarize yourself with the standard NetSuite forms. Read the following help topics for more information:

- Creating an Opportunity Record
- Preparing an Estimate
- Creating Sales Orders

For information on how to create a subscription opportunity, estimate, or sales order, read the following topics:

- Entering a Subscription Opportunity
- Entering a Subscription Estimate
- Entering a Subscription Sales Order
- Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator)

Customizing the Standard Sales Order Form

Using the standard sales order form for non-Recurring Billing items

If the Recurring Billing SuiteApp is installed in your account and you are entering a sales order that does not include Recurring Billing items, you can customize the standard sales order form to hide the **Configure Subscription** column on the **Items** subtab. This action prevents Recurring Billing scripts from interfering with the sales order creation when there are no Recurring Billing items on the sales order.

1. Go to Customization > Forms > Transactions Forms and click the **Customize** link next to the Standard Sales Order form.
2. Click the **Screen Fields** subtab.
3. Click the **Columns** subtab.
4. Clear the **Configure Subscription** box.
5. Save the custom form.

For information about entering a sales order (without Recurring Billing items), see the help topic Creating Sales Orders.

Showing the selected subscription plan on an approved sales order

You can customize the standard sales order form to show the selected subscription plan on the Items subtab upon approval of the sales order.

The following steps will only enable you to show the column on the Items subtab, you still have to select a subscription plan for the item using the Recurring Billing configurator. Upon approval of the sales order, you will be able to see the selected subscription plan for the line item in the Subscription Plan Generic column on the Items subtab of the sales order.

1. Go to Customization > Forms > Transactions Forms and click the Customize link next to the Standard Sales Order form.
2. Click the **Screen Fields** subtab.
3. Click the **Columns** subtab.
4. Check the **Subscription Plan Generic** box.
5. Save the custom form.

For more information on custom forms, see the help topic Custom Forms.

Entering a Subscription Opportunity

You can create a subscription opportunity to represent negotiations with prospective customers. As negotiations progress, you can make changes to your opportunity record, which you can later convert to a subscription estimate (quote) or a subscription sales order.

An opportunity can also be created for subscription renewals. For more information, see Renewing Items in a Subscription and Creating a Transaction for Subscription Item Renewal.

To enter a subscription opportunity:

1. Go to Transactions > Sales > Create Opportunities.

2. In the **Custom Form** field, select **Standard Opportunity**.

   > **Note:** Recurring Billing configurator is supported only on the standard opportunity form (or forms customized from the standard form).

3. Enter values in the fields under Primary Information, Forecasting, and Classification sections as you would in a standard opportunity. For more information, see the help topic Creating an Opportunity Record.
4. On the **Items** subtab:
   1. In the **Item** column, select a line item.
   2. Enter values in the other columns as you would in a standard opportunity. For more information, see the help topic Creating an Opportunity Record.
   3. To select a subscription plan for the line item, check the box in the **Configure Subscription** column to open the Recurring Billing configurator.
   4. Enter values in the fields on the Recurring Billing configurator. For more information, see Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator).
   5. Click **Save**.
5. Click **Add**.
6. Enter additional line items as needed. Repeat Steps 4 and 5 if you want to add other items.

   > **Note:** Although the buttons are available on the **Items** subtab of the sales order form, the **Add Multiple**, **Clear All Lines**, **Cancel**, and **Copy Previous** buttons are currently not supported when entering an opportunity with Recurring Billing items.

7. Enter values in the fields on the **Relationships**, **Communication**, and **Sales** subtabs as you would in a standard opportunity. For more information, see the help topic Creating an Opportunity Record.
8. Click **Save**.

Creating an Estimate or a Sales Order from a Subscription Opportunity

You can create an estimate or a sales order from an opportunity record. To do this, go to the opportunity record, click the Create New button, and select Estimate or Sales Order. For more information, see the help topic Creating Estimates and Other Transactions for an Opportunity.

When you create an estimate or a sales order from a subscription opportunity, the transaction is automatically filled with the items, company information, and subscription information from the opportunity record. Subscription information includes all the data from the Recurring Billing configurator, including custom pricing adjustments.

> **Note:** The default sales order form must be the standard NetSuite sales order form or any custom form derived from the standard form, with the **Configure Subscription** column shown. Using a custom form without the **Configure Subscription** column can lead to loss of Recurring Billing related data upon transformation of the record.

You can edit the resulting estimate or sales order before saving the transaction. Any changes made to the resulting estimate or sales order will not be reflected on the opportunity record where it was created from.

Entering a Subscription Estimate

A subscription estimate is a quote that you can send to a customer before the order is accepted. Customers typically review the estimate and perhaps ask for changes. When the customer accepts it, you can make the necessary changes and convert the estimate to a subscription sales order.

An opportunity record can be converted to an estimate. For information on subscription opportunities, see Entering a Subscription Opportunity.

An estimate can also be created for subscription renewals. For more information, see Renewing Items in a Subscription and Creating a Transaction for Subscription Item Renewal.

To enter a subscription estimate:

1. Go to Transactions > Sales > Prepare Estimates.
2. In the **Custom Form** field, select **Standard Estimate**.

   > **Note:** Recurring Billing configurator is supported only on the standard estimate form (or forms customized from the standard form).

3. Enter values in the fields under Primary Information, Sales Information, and Classification sections as you would in a standard estimate. For more information, see the help topic Preparing an Estimate.
4. On the **Items** subtab:
   1. In the **Item** column, select a line item.
   2. Enter values in the other columns as you would in a standard estimate. For more information, see the help topic Preparing an Estimate.
   3. To select a subscription plan for the line item, check the box in the **Configure Subscription** column to open the Recurring Billing configurator.
   4. Enter values in the fields on the Recurring Billing configurator. For more information, see Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator).
   5. Click **Save**.
5. Click **Add**.
6. Enter additional line items as needed. Repeat Steps 3 and 4 to add other items.

   > **Note:** Although the buttons are available on the **Items** subtab of the sales order form, the **Add Multiple**, **Clear All Lines**, **Cancel**, and **Copy Previous** buttons are currently not supported when entering an estimate with Recurring Billing items.

7. Enter values in the fields on the **Shipping**, **Billing**, **Accounting**, **Relationships**, and **Communication** subtabs as you would in a standard estimate. For more information, see the help topic Preparing an Estimate.
8. Click **Save**.

Creating a Sales Order from a Subscription Estimate

You can create a sales order from an estimate record. To do this, go to the estimate record and click the Sales Order button. For more information, see the help topic Converting an Estimate.

When you create a sales order from a subscription estimate, the transaction is automatically filled with the items, company information, and subscription information from the estimate record. Subscription information includes all the data from the Recurring Billing configurator, including custom pricing adjustments.

> **Note:** The default sales order form must be the standard NetSuite sales order form or any custom form derived from the standard form, with the **Configure Subscription** column shown. Using a custom form without the **Configure Subscription** column can lead to loss of Recurring Billing related data upon transformation of the record.

You can edit the resulting sales order before saving the transaction. Any changes made to the resulting sales order will not be reflected on the estimate record where it was created from.

Entering a Subscription Sales Order

A subscription sales order is a transaction that records a commitment to sell recurring items to a customer. You need to create a sales order for each sales transaction of recurring items.

An opportunity or estimate record can be converted to a sales order. For more information, see Entering a Subscription Opportunity and Entering a Subscription Estimate.

A sales order can also be created for subscription renewals. For more information, see Renewing Items in a Subscription and Creating a Transaction for Subscription Item Renewal.

After a sales order is approved, a new subscription record is automatically generated for the item. You can also add a sales order item to an existing subscription record. For more information on subscriptions, see Subscriptions.

> **Note:** The Recurring Billing SuiteApp supports the use of the standard NetSuite sales order form to create subscriptions.
>
> The Subscription Billing - Sales Order custom form is still available with the SuiteApp but it does not support the features and enhancements released in Recurring Billing version 14.2 and later versions. You should transition to using the standard sales order form (or customized version of the standard sales order form). However, please do not inactivate the Subscription Billing – Sales Order custom form because the standard sales order form depends on this custom form internally for processing of fields before the creation of subscription and subscription items.

The following procedure assumes that you are using the standard sales order form to enter a subscription sales order. If you are still using the Subscription Billing - Sales Order custom form, see Using the Subscription Billing - Sales Order Custom Form.

> **Note:** Memorized transactions are currently not supported when entering a subscription sales order.

Before entering a subscription sales order, see also Customizing the Standard Sales Order Form.

To enter a subscription sales order:

1. Go to Transactions > Sales > Enter Sales Orders.
2. In the **Custom Form** field, select **Standard Sales Order**.

> **Note:** Recurring Billing configurator is supported only on the standard sales order form (or forms customized from the standard form).

3. Enter values in the fields under Primary Information, Sales Information, and Classification as you would in a standard sales order. For more information, see the help topic Creating Sales Orders.

    > **Note:** When using the standard sales order form (or a customized version of the standard form), note that the **Start Date** field in the Primary Information header section is not related to the **Start Date** field on the Recurring Billing configurator. The specified start date in the header section will not be copied on the Recurring Billing configurator.

    > **Note:** If the Inventory feature is enabled and when you use Recurring Billing items in the sales order, the **Location** field is mandatory even if the **Make Locations Mandatory** box is not checked on the Accounting Preferences page.

4. On the **Items** subtab:
    1. In the **Item** column, select a sales order line item.
    2. Enter values in the other columns as you would in a standard sales order. For more information, see the help topic Creating Sales Orders.

        Take note of the following:

        - **Quantity** – For Recurring Billing items, any value specified in the **Quantity** column of the line item is disregarded. The quantity of the primary subscription items is set to 1, and this is also applied to its secondary subscription items (except fixed usage) and their charges. Fixed usage items follow the quantity set for the subscription plan item. For more information, see Setting Up Subscription Plan Items.
        - **Rate** and **Amount** – Values in the **Rate** and **Amount** columns are sourced from the item record. If you did not specify a base price on the item record, you need to manually enter a value in the **Amount** column (which is a mandatory field) before you can add the line item. You can set the base price on the item record to zero if you do not want to manually enter the amount every time you add a line item. The rate and amount values set on the sales order line item have no effect on the subscription because the actual amount for the subscription item is calculated based on the rate plan selected for the subscription plan item. For more information, see Setting Up Subscription Items and Setting Up Subscription Plan Items.
    3. To select a subscription plan for the line item, check the box in the **Configure Subscription** column to open the Recurring Billing configurator.
    4. Enter values in the fields on the Recurring Billing configurator. For more information, see Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator).
    5. Click **Save**.
5. Click **Add**.
6. Enter additional sales order items as needed. Repeat Steps 3 and 4 if you want to add other items.

    > **Note:** Although the buttons are available on the **Items** subtab of the sales order form, the **Add Multiple**, **Clear All Lines**, **Cancel**, and **Copy Previous** buttons are currently not supported when entering a sales order with Recurring Billing items.

7. Enter values in the fields under **Shipping**, **Billing**, **Accounting**, **Relationships**, and **Communications** subtabs. For more information, see the help topic Creating Sales Orders.

> **Note:** If the transaction type is set to cash sale, even if different settings are specified in the credit card section of the sales order, these settings have no effect on the subscription. Cash sales retrieve credit card information from the customer record, not from the sales order.

> **Note:** Customer Consolidated Payments is not currently supported in the Recurring Billing SuiteApp. For more information about this feature, see the help topic Consolidated Payments.

> **Note:** If you have the Multiple Currencies feature enabled, the currency defined on the customer's or vendor's NetSuite record determines the currency used to present the transaction amounts. The Recurring Billing SuiteApp does not currently support customers who use multiple currencies in their business dealings with you. For more information about these features, see the help topic Working with Currencies.

8. Click **Save**.

For information about configuring items on a subscription sales order using the Recurring Billing configurator, see Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator).

Approving a Subscription Sales Order

If you set the sales order status to Pending Approval, it needs to be approved by someone with authorization before it can be processed. If you set the sales order status to Pending Fulfillment, it skips the approval process and automatically enters the sales order fulfillment queue. For more information, see the help topic Approving Sales Orders.

You can no longer configure the subscription information of Recurring Billing items when you edit an approved sales order (that is, sales order status is not Pending Approval). However, you can still add, edit, or delete non-Recurring Billing items on a subscription sales order, even if a subscription has already been created from the sales order.

> **Important:** To avoid exceeding the workflow execution usage limit when approving multiple Add to Existing sales orders targeting the same subscription, the recommended maximum number of line items per sales order is 50. This limit is established by testing concurrent approval of multiple sales orders with 50 primary subscription items, each with one secondary item and without custom pricing adjustments. You should decrease the number of line items if your primary items have more than one secondary subscription item, or if you have custom pricing adjustments on your subscription sales orders. This recommendation is applicable to sales orders with the Subscription Option set to any of the Add to Existing options, and with the same subscription specified in the Subscription field on the Recurring Billing configurator.

When a subscription sales order is approved, a subscription is automatically generated or manually started depending on the value that you selected in the **Subscription Start Type** field on the Recurring Billing configurator).

- If you selected **On start date**, a subscription is automatically generated when a sales order is approved.
- If you selected **To be started manually**, the **Start Subscription** button appears on the sales order when it is approved. A subscription record will be generated only when you click the **Start Subscription** button. Manually start a subscription overwrites the start date settings. For more information, see Manually Starting a Subscription.

For more information about subscriptions, see Subscriptions.

Using the Subscription Billing - Sales Order Custom Form

The following procedure assumes that you are using the Subscription Billing - Sales Order custom form to enter a subscription sales order.

Note that starting with Recurring Billing version 14.2, the SuiteApp supports the use of the standard sales order form to create subscriptions (see Entering a Subscription Sales Order). You can still use the Subscription Billing – Sales Order custom form (or any form that is customized based on this form) but it does not support the features and enhancements that are released in version 14.2 and later.

> **Note:** You should transition to using the standard sales order form (or customized version of the standard sales order form). However, please do not inactivate the Subscription Billing – Sales Order custom form because the standard sales order form depends on this custom form internally for processing of fields before the creation of subscription and subscription items. For information about using the standard sales order form, see Entering a Subscription Sales Order.

To enter a subscription sales order:

1. Go to Transactions > Sales > Enter Sales Orders.
2. Under Primary Information, specify values for the following fields:

Field Name	Description
Custom Form	Select **Subscription Billing - Sales Order** or a customized version of this Recurring Billing form. **Important:** If you are using a customized version of the Subscription Billing - Sales Order form, make sure that on the custom transaction form, the **Subscription Plan Generic** box is checked on the **Sublist Fields** subtab. Go to Customization > Forms > Transaction Forms. Click the **Customize** link of the Subscription Billing - Sales Order form. On the Custom Transaction Form page, click the **Sublist Fields** subtab and check the **Subscription Plan Generic** box. If a sales order is approved before the **Subscription Plan Generic** box is checked, re-approval of the sales order will no longer trigger the subscription creation process. In this case, you can make a copy of the sales order or create a new one using the custom form with a checked **Subscription Plan Generic** box. **Note:** Memorized transactions are currently not supported on subscription sales order forms.
Subscription Start Type	Select whether you want the subscription to start on the date entered in the **Start Date** field or if you want to overwrite the preset start date and manually start the subscription. To manually start a subscription, see Manually Starting a Subscription.

   Enter values in the other fields under Primary Information as you would in a standard sales order. For more information, see the help topic Creating Sales Orders.

   > **Note:** Some fields cannot be modified or may be disabled when opening an approved subscription sales order in edit mode.

3. Enter values in the fields under Sales Information and Classification as you would in a standard sales order. For more information, see the help topic Creating Sales Orders.

4. Under Subscription, specify values for the following fields:

Field Name	Description
Subscription Option	Select whether you want to create a new subscription from the sales order or add subscription items to an existing subscription. ■ **New Subscription** – Creates a new subscription from the sales order. ■ **Add to existing, align with current billing close and prorate** – Adds items to an existing subscription and adjusts its billing date to align with the current billing cycle of the subscription. Proration will be applied to charges that fall within the current billing cycle. ■ **Add to existing, align with next billing cycle start with no proration** – Adds items to an existing subscription and adjusts its billing date to align with the next billing cycle of the subscription. No proration will be applied to charges that fall outside the next billing cycle.
Transaction Type	Select whether you are entering the sales order as an invoice or cash sale. If a credit card information is set on the customer record, you have the option to set the transaction type to cash sale (default) or invoice. If no default credit card information is set on the customer record, the transaction type is invoice.
Subscription	If you selected any of the **Add to existing** options in the **Subscription Option** field, select an existing subscription where you want to add items. You cannot add an item to an existing subscription that has a different billing mode, termination method, or transaction type. For more information, see Adding Items to a Subscription. The **Status**, **Billing Mode**, and **Termination Method** fields are automatically updated with the values from the selected subscription. If the billing mode is Fixed Date, the value for the **Fixed Billing Date** field is also sourced.
Time Zone	Select the subscription time zone. This time zone is used to determine the start and end dates of subscription items. The default value is the time zone preference specified on the Subscription Billing Preferences page. **Note:** The start and end dates of a subscription item are dependent on the time zone specified on the User Preferences (Home > Set Preferences, General subtab). Any modification to the user's time zone is immediately reflected on the Subscription Items sublist. Discrepancies will be evident if the user time zone settings differ from the subscription time zone settings. For example, if the subscription time zone is GMT +08:00 Manila and the user preference time zone is GMT -08:00 PST, the Primary Information section of the subscription record reflects the subscription time zone (GMT +08:00) whereas the Subscription Items sublist display recalculated start and end dates based on the user time zone (GMT -08:00).

5. Under the **Items** subtab:

    1. Specify values for the following columns for each sales order item.

Column Name	Description
Item	Select a sales order line item. For information about setting up subscription items, Setting Up Subscription Items.
Subscription Plan	Select a subscription plan that is associated with the selected line item. This field shows subscription plans where the line item is the lead item. Subscription plans contain information used by the sales order to generate a subscription. For more information, see Setting Up Subscription Plans.

Column Name	Description
	You cannot use subscription plans with different billing modes in the same sales order. The values for the **Total Recurring Amount**, **End**, **Rating Frequency**, **Term**, **Quantity**, **Rate**, **Amount**, and **Co-Term** fields are automatically updated with the values from the selected subscription plan. **Note:** Custom pricing changes are not reflected in the **Total Recurring Amount** field on the sales order form and subscription record. The value in this field is based on the value of the **Total Recurring Amount** field of the subscription plan.
Discount	If needed, specify a percentage discount for the line item. This discount will apply only to subscription plan items where the **Allow Line Discount** box is checked. Value for percentage discount can be any positive value up to 100, excluding zero.
Start	Specify an effective date for the subscription item. The date in the **Start** column is initially set to the date specified in the **Start Date** field under the Primary Information section. You can use this default start date or you can enter a different effective date for the subscription item in the **Start** column. If you are entering an order for a subscription with multiple subscription items, you can specify different start dates for each item. The subscription start date (**Start Date** field) and cycle start and end dates are based on the subscription item with the earliest start date. Initial charges for the other subscription items are prorated based on their respective start dates.
End	Specify an end date for the subscription item. By default, the value in this field is based on the specified start date and on the selected subscription plan's term. You can accept the default value or change it to a custom end date. Custom end date must be: ■ Not less than one rating period from the start date, based on the selected subscription plan's rating frequency. ■ Not more than 120 months from the start date. The value in the **Term** field automatically changes to **Custom Term** when the end date is modified, or to **Perpetual** when the end date is removed. Take note of the following: ■ If the original term on the subscription plan is less than 48 months (that is, minimum term has not been set previously), and the custom end date results to a term that is more than 36 months, a default minimum term of 36 months is set. Also, the notice period value from the subscription plan is used if the resulting custom term is more than 36 months. ■ For subscription plans with renewal settings, if the subscription is originally created with a custom end date, the term upon renewal will still follow the renewal settings from the subscription plan (not the custom term). ■ You cannot set a custom end date if **Subscription Start Type** is set to **To be started manually**. If you set the **Subscription Start Type** to **On start date**, you can set a custom end date for the line items but you will no longer be allowed to change the subscription start type after doing so. ■ For co-term, you can set a custom end date only if **Co-Term** is set to **Add new item but no co-term alignment**.

Column Name	Description
Tax Code / Tax	If your company operates in the U.S. and the Per-Line Taxes on Transaction preference is enabled in your account, you can select the appropriate tax code for each line item that you add to the sales order. This tax code is copied to the primary subscription item record. You can edit the primary subscription item record to change the tax code. The tax code set on the primary subscription item record is carried over to the invoice when you bill the subscription. If the Per-Line Taxes on Transaction preference is disabled, check the box in the **Tax** column to apply taxes to this transaction line item. You can set the tax code on the **Accounting** subtab of the sales order. However, the tax code on the sales order is not copied to the primary subscription item record. Also, when you set a tax code on the primary subscription item record, the tax code is not carried over to the invoice when you bill the subscription. For information about the Per-Line Taxes on Transaction preference, see the help topic Setting U.S. Tax Preferences.
Co-Term	Select a co-term alignment option. Co-term enables you to align the end dates of subscription plan items when adding items to an existing subscription. This feature is applicable only if you selected any of the **Add to Existing** options in the **Subscription Option** field. For more information, see Co-termination. ▪ **Add new item but no co-term alignment** – Adds a new item to an existing subscription without aligning the end dates. ▪ **Align new item's co-term with existing subscription** – Adds a new item and aligns its end date to the existing subscription item's end date. You can align multiple new items to the same existing item. A newly added item's end date can only be truncated. ▪ **Align existing item's co-term with newly added item** – Adds a new item to an existing subscription and aligns the existing subscription item's end date to the new item's end date. You can co-term an existing item with a newly added item only one time (1:1). An existing item's end date can only be extended. If you choose to align the end dates, click the **Customize Subscription Price** button. A popup window appears with the available primary subscription items for co-term. Select an item to co-term with and click **Save**. Co-term is not supported if you selected **To be started manually** in the **Subscription Start Type** field.
Start Type	Select the start type for the subscription item. ▪ **Immediate** – Creates the subscription item with a status of Open. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Open when the start date is equal to the current date. ▪ **Suspended** – Creates the subscription item and sets its status to Suspended upon creation. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Suspended when the start date is equal to the current date. Creating a subscription item in suspended state enables you to create subscriptions in advance of service start. A suspended subscription item can later be reactivated when it is ready to be billed. For more information, see Creating Subscription Items in Suspended State.

2. If you want to specify a custom rate, discount, or new quantity for the subscription item, click the **Customize Subscription Price** button. On the Customize Subscription Price

window, enter the custom pricing changes you want to apply and click **Save**. For more information on custom pricing adjustments, see Custom Pricing.

> **Important:** Even if the line item has an end date (that is, the term is not perpetual), all custom pricing adjustments (except for uplift) will be carried over after renewal unless you migrate to a new plan.

> **Important:** When you make a copy of a sales order, any custom pricing changes applied to the original sales order will not be carried over to the new sales order. Also, initially, the **Customize Subscription Price** button will not appear on the new sales order and any discount entered in the line item **Discount** field will not be applied.
>
> Before you make any adjustments, save the new sales order with a status of Pending Approval first, then click **Edit** on the saved sales order record. On edit mode, the **Customize Subscription Price** button will be available for custom pricing adjustments and any percentage discount entered in line item **Discount** field will be applied accordingly.

3. Click **Add** to include the sales order item to the subscription.
4. Enter additional sales order items as needed.
5. For a sales order item that contains subscription plans with fixed date billing mode, select a fixed billing date in the **Fixed Billing Date** field under the Subscription section. The fixed billing date determines the subscription cycle start and end dates for fixed date subscriptions. For more information, see Fixed Date Billing.

> **Important:** Make sure that you have set up available billing dates in your Fixed Billing Dates list. For more information, see Setting Up Fixed Billing Dates.

6. Enter values in the fields under the **Shipping**, **Billing**, **Accounting**, **Relationships**, and **Communication** subtabs. For more information, see the help topic Creating Sales Orders.

> **Note:** If the transaction type is set to cash sale, even if different settings are specified in the credit card section of the sales order, these settings have no effect on the subscription. Cash sales retrieve credit card information from the customer record, not from the sales order.

> **Note:** Customer Consolidated Payments is currently not supported in the Recurring Billing SuiteApp. For more information about this feature, see the help topic Consolidated Payments.

> **Note:** If you have the Multiple Currencies feature enabled, the currency defined on the customer or vendor record in NetSuite determines the currency used to present the transaction amounts. The Recurring Billing SuiteApp does not currently support customers who use multiple currencies in their business dealings with you. For more information about these features, see the help topic Working with Currencies.

7. Click **Save**.

If you set the sales order status to Pending Approval, it has to be approved by someone with authorization before it can be processed. If you set the sales order status to Pending Fulfillment, it skips the approval process and automatically enters the sales order fulfillment queue. For more information, see the help topic Approving Sales Orders.

When a subscription sales order is approved, a subscription is automatically generated or manually started depending on the value that you selected in the **Subscription Start Type** field. The **Start Subscription** button is added to the sales order if you selected **To be started manually**. Clicking the **Start Subscription** button overwrites the start date settings and creates the subscription record.

For more information about subscriptions, see Subscriptions.

Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator)

The Recurring Billing feature is available through a popup configurator on the standard NetSuite opportunity, estimate, and sales order forms.

When entering a subscription sales transaction, check the box in the **Configure Subscription** column on the **Items** subtab of the transaction forms to launch the Recurring Billing configurator.

For information on entering sales transactions for subscriptions, read the following topics:

- Entering a Subscription Opportunity
- Entering a Subscription Estimate
- Entering a Subscription Sales Order

For information about the fields on the Recurring Billing configurator, refer to the following table .

> **Note:** If the item is a renewal item, some fields on the Recurring Billing configurator (such as Start Date, End Date, and Co-Term) are not editable.

Field Name	Description
Subscription Start Type	Select whether you want the subscription to start on the date entered in the **Start Date** field or if you want to overwrite the preset date and manually start the subscription. To manually start a subscription, see Manually Starting a Subscription.
Subscription Option	Select whether you want to create a new subscription or add items to an existing subscription. ▪ **New Subscription** – Creates a new subscription. ▪ **Add to existing, align with current billing close and prorate** – Adds items to an existing subscription and adjusts its billing date to align with the current billing cycle of the subscription. Proration will be applied to charges that fall within the current billing cycle. ▪ **Add to existing, align with next billing cycle start with no proration** – Adds items to an existing subscription and adjusts its billing date to align with the next billing cycle of the subscription. No proration will be applied to charges that fall outside the next billing cycle. **Important:** To avoid exceeding the workflow execution usage limit when approving multiple Add to Existing sales orders targeting the same subscription, the recommended maximum number of line items per sales order is 50. For more information, see Approving a Subscription Sales Order.
Transaction Type	Select whether you are entering the transaction as an invoice or cash sale. If a credit card information is set on the customer record, you have the option to set the transaction type to cash sale (default) or invoice. If no default credit card information is set on the customer record, the transaction type is invoice.
Subscription	If you selected any of the **Add to existing** options in the **Subscription Option** field, select an existing subscription where you want to add items. You cannot add items to an existing subscription that has a different billing mode, termination method, or transaction type. For more information, see Adding Items to a Subscription.

Field Name	Description
	The **Status**, **Billing Mode**, and **Termination Method** fields are automatically updated with the values from the selected subscription. If the billing mode is Fixed Date, the **Fixed Billing Date** field is also sourced.
Fixed Billing Date	If the billing mode is Fixed Date, select a fixed billing date. As you add line items on the sales transaction, the options in this field may change because they are filtered based on the start dates and rating frequencies of the line items. Although you can select a different value per line item, the actual Fixed Billing Date for the subscription will be the last date that you selected. **Note:** Removing line items may also remove a previously set fixed billing date. To make sure you have a valid fixed billing date after removing a line item, configure one of the line items again and re-select a fixed billing date. Make sure that you have set up available billing dates in your Fixed Billing Dates list. The fixed billing date determines the billing cycle dates for fixed date subscriptions. For more information, see Setting Up Fixed Billing Dates and Fixed Date Billing.
Time Zone	Select a subscription time zone. This time zone is used to determine the start and end dates of subscription items. The default value is the time zone preference specified in the Subscription Billing Preferences page. **Note:** The start and end dates of a subscription item are dependent on the time zone specified in the User Preferences (Home > Set Preferences > General). Any modification to the user's time zone is reflected in the Subscription Items sublist immediately. Discrepancies will be evident if the user time zone settings differ from the subscription time zone settings. For example, if the subscription time zone is GMT +08:00 Manila and the user preference time zone is GMT -08:00 PST, the Primary Information section of the subscription record reflects the subscription time zone (GMT +08:00) whereas the Subscription Items sublist display recalculated start and end dates based on the user time zone (GMT -08:00).
Item	This field shows the line item.
Subscription Plan	Select a subscription plan that is associated with the selected line item. This field shows subscription plans where the line item is the lead item. If the line item belongs to a product line, this field also shows subscription plans with the same product line as the line item. You cannot use subscription plans with different billing modes in the same sales transaction. The **Total Recurring Amount**, **Term**, **Rating Frequency**, and **Co-Term** fields are automatically updated with the values from the selected subscription plan. **Note:** Custom pricing changes are not reflected in the **Total Recurring Amount** field on the sales order form and subscription record. The value in this field is based on the value of the **Total Recurring Amount** field of the subscription plan. **Note:** If the item is a renewal item, the subscription plans are filtered based on the same conditions that apply to subscription plans for plan migration. For more information, see Migrating Customers and Items to a New Subscription Plan.
Discount	If needed, specify a percentage discount for the line item. This will apply only to subscription plan items where the **Allow Line Discount** box is checked. Value for percentage discount can be any positive value up to 100, excluding zero.
Start Date	Specify a start date for the subscription item.
End Date	Specify an end date for the subscription item.

Field Name	Description
	By default, the value in this field is based on the specified start date and on the selected subscription plan's term. You can accept the default value or change it to a custom end date. Custom end date must be: ■ Not less than one rating period from the start date, based on the selected subscription plan's rating frequency. ■ Not more than 120 months from the start date. The value in the **Term** field automatically changes to **Custom Term** when the end date is modified, or to **Perpetual** when the end date is removed. **Note:** If the original term on the subscription plan is less than 48 months (that is, minimum term has not been set previously), and the custom end date results to a custom term that is more than 36 months, a default minimum term of 36 months is set for the subscription item. For subscription plans with renewal settings, if the subscription is originally created with a custom end date, the term upon renewal will still follow the renewal settings from the subscription plan (not the custom term). For more information, see Setting Up Subscription Plans. Custom term is not supported if you selected **To be started manually** in the **Subscription Start Type** field.
Notice Period	By default, this field is dimmed and shows the notice period value of the selected subscription plan. You can modify the notice period value for the subscription item if you set a custom end date in the **End Date** field that results to a term of more than 36 months. You can enter any positive integer from 1 to 120. If you leave this field blank, the subscription item will use the default notice period value from the selected subscription plan. Notice period represents the minimum number of future charges that must always be available for a subscription item.
Co-Term	Select a co-term alignment option. Co-term enables you to align the end dates of subscription plans when adding items to an existing subscription. This feature is applicable only if you selected any of the **Add to existing** options in the **Subscription Option** field. For more information, see Co-termination. ■ **Add new item but no co-term alignment** – Adds a new item to an existing subscription without aligning the end dates. ■ **Align new item's co-term with existing subscription** – Adds a new item and aligns its end date to the existing subscription item's end date. You can align multiple new items to the same existing item. A newly added item's end date can only be truncated. ■ **Align existing item's co-term with newly added item** – Adds a new item to an existing subscription and aligns the existing subscription item's end date to the new item's end date. You can co-term an existing item with a newly added item only one time (1:1). An existing item's end date can only be extended. If you choose to align the end dates, click the **Customize Subscription Price** button and select a co-term item from the list of primary subscription items in the subscription. Co-term is not supported if you selected **To be started manually** in the **Subscription Start Type** field.
Start Type	Select a start type for the line item. ■ **Immediate** – Creates the subscription item with a status of Open. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Open when the start date is equal to the current date. ■ **Suspended** – Creates the subscription item and sets its status to Suspended upon creation. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Suspended when the start date is equal to the current date. Creating a subscription item in suspended state enables you to generate subscriptions in advance of service start. A suspended subscription item can later be reactivated when it

Field Name	Description
	is ready to be billed. For more information, see Creating Subscription Items in Suspended State.

If you want to specify a custom rate, discount, or new quantity for the line item, click the **Customize Subscription Price** button. On the Customize Subscription Price window, enter the custom pricing changes that you want to apply and click **Save**. For more information, see Custom Pricing.

Important: Even if the line item has an end date (that is, the term is not perpetual), all custom pricing adjustments (except for uplift) will be carried over after renewal unless you migrate to a new plan.

Subscriptions

Subscriptions are records used to track sales and transaction histories of recurring items. A subscription record is created when a subscription sales order is approved and its primary and secondary items are processed and created.

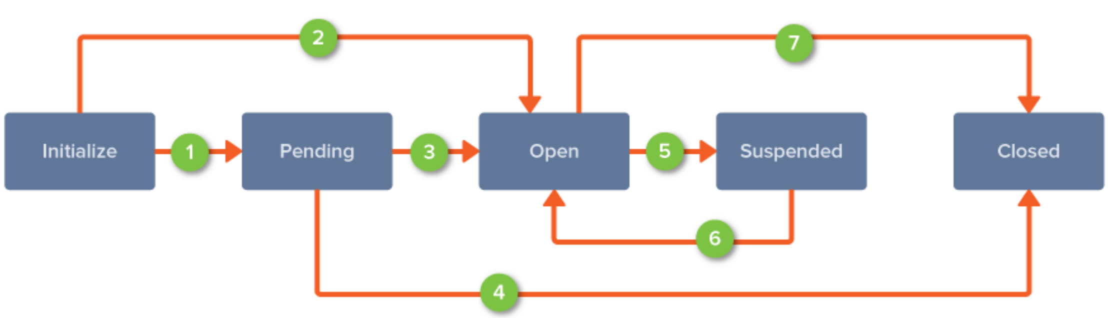
On approve of a sales order, the subscription record and its primary items are created with a status of **Initializing**. A scheduled script then creates the secondary items and creates the first charge for each secondary item. When all the secondary items and its first charge have been created, the status of the subscription record and its primary items changes to **Pending** or **Open**, depending on the start date set in the subscription sales order. Another scheduled script will then run to create the remaining charges for the secondary items based on its term (or based on the minimum term if the term is more than 36 months). For more information, see Subscription Creation.

Warning: Do not update or modify the SO Subscription Info, SO Line Item Info, and Subscription Adjustment custom records that are automatically created when you create a subscription using the standard sales order form. Altering any information on these custom records through mass update or CSV import will result to incorrect data and processing problems.

After the subscription record and its primary and secondary items are created, a subscription changes to various states depending on user actions and schedules set in the subscription items. For more information, see Subscription Workflow and Managing Subscriptions.

Subscription Workflow

The following diagram illustrates the various states of a subscription record while the following table describes the user actions and schedules that trigger the changes in the subscription lifecycle states.



Subscription State	Action ID	Description
Initializing	1	After a subscription record and its primary and secondary items are created, its status changes to Pending if the start date on the subscription sales order is set to a future date.
	2	After a subscription record and its primary and secondary items are created, its status changes to Open on the start date set on the subscription sales order.
Pending	3	A subscription changes to Open on the start date set on the subscription sales order.
	4	A subscription changes to Closed when a pending subscription is manually terminated by the user.
Open		A subscription remains in Open state if at least one subscription item is Open or Pending Renewal even if there are other items in the subscription that have the following status: ▪ Pending ▪ Pending Migration ▪ Migrated ▪ Suspended ▪ Pending Termination ▪ Terminated
	5	A subscription changes from Open to Suspended when all subscription items in the subscription has been suspended.
Suspended	6	A subscription changes from Suspended to Open if at least one of the subscription items in the subscription is Open or Pending Renewal.
Closed	7	When subscription items are manually terminated, the status of the item will change to Pending Termination while the status of the subscription remains Open. During a bill run operation, the items that are pending termination will change to Terminated. When all items in the subscription are terminated, the subscription status changes to Closed. A subscription also changes from Open to Closed when all subscription items has reached the end of its term. **Note:** A primary subscription item is set to Closed when it has reached the end of its term (that is, its term is not Perpetual and its end date is earlier than the current date), it has no renewal action, and all secondary subscription items under the primary subscription item has been billed. Subscription items will be checked daily at 2 AM PST to determine whether its status should be set to Closed.

Note: Subscriptions with an error status cannot undergo any of the Recurring Billing processes and will require user intervention to be reactivated. For more information, see Activating a Subscription with an Error Status.

Managing Subscriptions

The following procedures describe the manual steps that a user performs in transitioning a subscription to its various lifecycle states.

- Activating a Subscription with an Error Status
- Applying Credit Memos
- Attaching a Service Record to a Subscription
- Creating Subscription Items in Suspended State

- Manually Starting a Subscription
- Recreating a Subscription Stuck with an Initializing Status
- Subscription Change Order Actions
  - Priority Levels of Subscription Change Order Actions
  - Backdated Subscription Change Orders
  - Adding Items to a Subscription
  - Adding One-Time Subscription Charges
  - Custom Pricing
  - Extending the End Date of a Subscription Item
  - Migrating Customers and Items to a New Subscription Plan
  - Modifying the Quantity of Fixed Usage Items
  - Modifying the Start Date of a Subscription
  - Reactivating a Suspended Subscription Item
  - Renewing Items in a Subscription
  - Suspending a Subscription Item
  - Terminating an Item in a Subscription

For more information on subscription lifecycle states, see Subscription Workflow.

To associate a subscription record to a service record, see Attaching a Service Record to a Subscription.

Activating a Subscription with an Error Status

The status of a subscription is set to **Error** if an error is encountered at any time during processing. Subscriptions with this status cannot undergo any of the Recurring Billing processes and will require user intervention to be reactivated.

To reactivate the subscription, click the **Retry** button on the subscription record. This action sets the subscription status to **Open** and enables further processing of the subscription.

If the error is encountered during subscription creation, when you click the **Retry** button, the subscription creation process will replace the last subscription item that encountered an error and finish processing the subscription.

Applying Credit Memos

When a subscription is billed in advance and any of the following change order actions is applied to the subscription or its items, an overpayment or negative charge is recorded for that subscription.

- Termination of a subscription or subscription item
- Suspension and reactivation of a subscription or subscription lead item
- Migration of a subscription to a new subscription plan
- Updates to the quantity of a fixed usage item in the subscription
- Updates to the rate, discount, or uplift of a subscription item
- Applying a negative one-time charge to a subscription

The recorded overpayment is then processed by the billing system to create a credit memo. Credit memos are transactions that decrease the amount a customer owes you. For more information, see the help topic Customer Credit Memos.

> **Note:** Proration option must be enabled for the change order actions to create credit memos.

> **Note:** If the **Create Credit Memo for Negative Charge** preference is disabled, negative charge amounts are included as separate line items on subscription invoices, and credit memos are not created. Subscription invoices with a negative charge must still have a positive net total amount. Otherwise, you will get an error. For more information, see Setting Up Recurring Billing Preferences.

You can set the Recurring Billing SuiteApp to automatically apply credit memos to the latest open invoice of the customer with the same subscription ID by checking the Apply Credit Memo option on the customer record.

To enable the automatic application of credit memos

1. Go to Lists > Relationships > Customers.
2. Click **Edit** next to the customer for which you want to apply the automatic creation of credit memos.
3. On the **Custom** subtab, check **Apply Credit Memo**.
4. Click **Save**.

You can set the Recurring Billing SuiteApp to automatically enable the Apply Credit Memo option for new customer records created.

To enable automatic creation of credit memos for new customers

1. Go to Subscription Billing > Account Setup > Subscription Billing Preferences.
2. Click **Edit**.
3. On the **General Preferences** subtab, check **Apply Credit Memo**.
4. Click **Save**.

You can still manually apply credit memos even if the Apply Credit Memo option is disabled. For more information on manually applying credit memos, see the help topic Applying a Customer Credit Memo.

Attaching a Service Record to a Subscription

A service record is an electronic file that details a subscriber's account history including orders, billing information, service provisioning activities, troubleshooting, and service requests.

You can link a service record to a subscription record created from other NetSuite applications or from a third-party application. Contact your NetSuite Professional Services Consultant for assistance in integrating service records from third-party applications into NetSuite.

To associate a service record to a subscription:

1. Go to Subscription Billing > View Records > Subscription.
2. Click **Edit** next to the subscription that you want to associate with a service record.
3. In the **Service** field, select the service record that you want to associate with the subscription.

   The **Service ID** field is automatically updated with the ID of the service record, if available.

   > **Note:** The **Service** and **Service ID** fields are not mandatory fields. The service record is always editable if the subscription is not marked for termination.

4. Click **Save**.

Creating Subscription Items in Suspended State

Creating a subscription item in suspended state enables you to create subscriptions in advance of service start. You can later reactivate a suspended subscription item when it is ready to be billed.

When creating a subscription sales transaction or adding an item to an existing subscription through a change order, specify a start type for each subscription item you enter. This will determine the status of the subscription item upon creation. Options in the Start Type field are:

- **Immediate** – Creates the subscription item with a status of Open. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Open when the start date is equal to the current date.
- **Suspended** – Creates the subscription item and sets its status to Suspended upon creation. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Suspended when the start date is equal to the current date.

  Standard subscription creation process is followed before the creation and execution of a suspend change order. First, a subscription is created with the subscription item status set to Open or Pending. If the subscription item is Open (backdated or start date is current date), a suspend change order is immediately created and executed after subscription creation. If the subscription is Pending (start date is a future date), a suspend change order with a pending status is created. When the subscription start date arrives, the suspend change order is then executed. Upon execution of the suspend change order, the subscription item status is set to Suspended.

  If all subscription items in the new subscription are created with a status of Suspended, the subscription status will also change from Open to Suspended.

  > **Note:** For accounts that use multiple queues (SuiteCloud Plus License), you might have to wait for a few minutes (30 minutes at most) before the subscription status changes from Open to Suspended. To prevent errors or data corruption, please refrain from performing any changes to the subscription until its status has changed to Suspended.

A suspended subscription item can be reactivated when it is ready to be billed. Upon reactivation, the subscription status is set to Open and you have the option to either bill the user for the suspended period or start billing from the reactivation date. For information on how to reactivate a suspended subscription item, see Reactivating a Suspended Subscription Item.

> **Note:** Subscription items created in suspended state are excluded from the renewal process until it gets reactivated.

For information on how to create a subscription sales transaction, see Creating Subscriptions.

For information on how to add an item to a subscription through a change order, see Adding a Subscription Item.

Manually Starting a Subscription

You need to manually start a subscription if you set the subscription start type to **To be started manually** on the sales transaction. Otherwise, a subscription is automatically generated when a subscription sales order is approved.

Click Start Subscription on the sales order record to manually start the subscription. Manually starting a subscription overwrites the start date settings from the sales order (including the line items) and creates a subscription record using the current date as the start date.

For more information, see Entering a Subscription Sales Order.

Recreating a Subscription Stuck with an Initializing Status

Subscriptions stuck with Initializing status cannot undergo any of the Recurring Billing processes and will require user intervention to open the subscription.

To recreate a subscription that is stuck in Initializing status, click the **Retry** button on the subscription record. This action re-initiates the workflow that creates the subscription items for the subscription.

The **Retry** button is available only on subscriptions with Initializing status that satisfy the following conditions:

- Subscription's last non-error status is null (that is, new subscription).
- There are no primary subscription items created for the subscription.

The **Retry** button cannot be used to fix the following subscriptions:

- Subscription that got stuck in initializing because of an Add Subscription Item change order.
- Subscription that got stuck in initializing in the middle of primary item creation.
- Stuck subscriptions that were created before Recurring Billing version 17.1.3.

Subscription Change Order Actions

For general information on subscription change order actions, read the following help topics:

- Priority Levels of Subscription Change Order Actions
- Backdated Subscription Change Orders

The following table shows the list of subscription change order actions. Read the specific help topics for more information about the change orders.

> **Note:** The **Run Billing** button is not available on subscriptions with in progress changes orders (except for Renew Subscription Item) or with pending change orders that are effective immediately (Add One-Time Charge, Add Subscription Item, Extend Subscription Item End Date, and Modify Subscription Item Start Date).

> **Note:** When applying multiple change orders with the same execution date and targeting the same record, you should limit the number of change orders to 5 to avoid exceeding the execution time limit. For information about change order prioritization, see Priority Levels of Subscription Change Order Actions.

Subscription Action	Target Record	Effective immediately?	Help Topic
Add One-Time Charge	Primary subscription item	Yes	Adding One-Time Subscription Charges
Add Subscription Item	Subscription	Yes	Adding a Subscription Item
Extend Subscription Item End Date	Subscription Primary subscription item	Yes	Extending the End Date of a Subscription Item
Migrate Subscription Plan	Primary subscription item	No	Migrating Customers and Items to a New Subscription Plan
Modify Quantity for Fixed Usage	Primary subscription item Secondary subscription item	No	Modifying the Quantity of Fixed Usage Items
Modify Subscription Item Rate	Secondary subscription item	No	Modifying Subscription Item Rate

Subscription Action	Target Record	Effective immediately?	Help Topic
Modify Subscription Item Start Date	Subscription Primary subscription item	Yes	Modifying the Start Date of a Subscription
Reactivate Subscription Item	Subscription Primary subscription item	No	Reactivating a Suspended Subscription Item
Renew Subscription Item	Primary subscription item	No	Renewing Items in a Subscription
Suspend Subscription Item	Subscription Primary subscription item	No	Suspending a Subscription Item
Terminate Subscription Item	Subscription Primary subscription item	No	Terminating an Item in a Subscription

Change orders are listed on the **Change History** subtab of subscription and subscription item records. Pending change orders are listed on the **Pending Changes** subtab under **Change History** subtab. To cancel a pending change order, do any of the following:

- With the subscription or subscription item record on view mode, go to the **Pending Changes** subtab and click the Change Order ID for the change order. On the subscription change order record, click **Cancel Change Order**.
- With the subscription or subscription item record on edit mode, go to the **Pending Changes** subtab and click the **Cancel** link for the change order.

Priority Levels of Subscription Change Order Actions

When you apply multiple change orders to a subscription or subscription item, the billing system queues these change order actions and processes them according to their execution date and priority level. If there is more than one change order action with the same execution date (future date) for the same subscription item, the billing system applies the change order action with a higher priority level before applying succeeding change order actions.

Note: If a subscription item has a pending change order, and another change order action is applied to that item, the newer change order action does not replace the pending change order. Instead, both actions are queued to be implemented on their execution date. If they have the same execution date, the change orders are implemented according to priority level.

Subscription change order actions are assigned the following priority levels with 100 as the highest priority:

- Terminate Subscription Item – 100
- Suspend Subscription Item – 200
- Reactivate Subscription Item – 300
- Modify Quantity for Fixed Usage – 500
- Modify Subscription Item Rate – 550
- Migrate Subscription Plan – 600
- Renew Subscription Item – 700

If an item is being processed for renewal and a new change order is applied to the same item, the billing system processes the new change order first and cancels the pending renewal action.

Any changes made by a previous change order action on a subscription item can affect succeeding change orders. This can result to canceled or failed change orders. For example, you will receive an error while processing a subscription item using a lower priority change order action if you applied a terminate subscription item action on the same subscription item.

Backdated Subscription Change Orders

This feature enables you to create backdated subscription change orders. To backdate means to enter a date that is earlier than the current date. For information about the conditions for backdated change orders, see Conditions for a Valid Backdated Change Order.

To use this feature, you must enable the Allow Backdated Change Order preference. For more information, see General Preferences in Setting Up Recurring Billing Preferences.

> **Warning:** When this feature is enabled, it cannot be disabled and you will be responsible for the correct interpretation of the financial data. Any reports generated in which the covered period is when the backdated change was made can now contain material errors.

There is no change to feature capabilities if you do not enable the Allow Backdated Change Order preference, you can only select the current date or any future date as the effective for subscription change orders.

To enable backdated change orders:

1. Go to Subscription Billing > Account Setup > Subscription Billing Preferences.
2. On the Subscription Billing Preferences page, click **Edit**.
3. Click the **General Preferences** subtab.
4. On the Account section, check the **Allow Backdated Change Orders** box.
5. Click **Save**.

Supported Change Order Actions

Backdating is supported for the following subscription change order actions:

- Add One Time Charge – See Adding One-Time Subscription Charges
- Add Subscription Item – See Adding a Subscription Item
- Migrate Subscription Plan – See Migrating Customers and Items to a New Subscription Plan
- Modify Quantity for Fixed Usage – See Modifying the Quantity of Fixed Usage Items
- Modify Subscription Item Rate – See Modifying Subscription Item Rate
- Modify Subscription Start Date – See Modifying the Start Date of a Subscription
- Reactivate Subscription Item – See Reactivating a Suspended Subscription Item
- Suspend Subscription Item – See Suspending a Subscription Item
- Terminate Subscription Item – See Terminating an Item in a Subscription

Backdating is not applicable to Extend Subscription Item End Date and Renew Subscription Item change orders.

Conditions for a Valid Backdated Change Order

When creating backdated change orders, the following conditions apply.

- A backdated change order is effective immediately and cannot be canceled.
- You can only backdate up to the last subscription billing date. If the item is not yet billed, you can backdate up to the subscription item start date. Take note of the following exceptions for some change orders.
  - For Migrate Subscription Plan, you can backdate up to one day after the last subscription billing date. If the item is not yet billed, you can backdate up to one day after the subscription item start date.
  - For Modify Quantity for Fixed Usage, you can backdate up to one day after the last subscription billing date. If the item is not yet billed, you can backdate up to the subscription item start date.

  - For Modify Subscription Start Date, you can backdate up to the transaction creation date.
- If a first change order has been applied for the current period (that is, from the last subscription billing date up to the current date), a second change order can only be backdated up to the effective date of the previous change order. This is applicable to all change order actions, except for the following cases:
  - If the first (previous) change order is Add One Time Charge, Add Subscription Item, Extend Subscription Item End Date, or Renew Subscription Item.
  - If the second (current) change order that you want to backdate is Add One Time Charge or Add Subscription Item.

  > **Note:** Conditions on the applicable change order actions based on the status of the subscription or subscription item still apply.

- For variable usage items:
  - For Modify Subscription Item Rate change order, mid-period adjustments are not allowed.
  - If a backdated Terminate Subscription Item change order is applied to an item, the charges are updated to exclude the usage data incurred after the termination date.
  - If a backdated Migrate Subscription Plan change order is applied to an item:
    - For the original item, the charges are updated to exclude the usage data incurred after the termination date.
    - For the new item, usage data charges are applied depending on the filter or usage criteria settings.

> **Note:** Other conditions specific to each change order action still apply. For more information, read the specific help topics for the subscription change order actions.

Adding Items to a Subscription

You can add items to an existing subscription by creating a sales transaction. For more information, see the following help topics:

- Entering a Subscription Opportunity
- Entering a Subscription Estimate
- Entering a Subscription Sales Order
- Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator)

> **Note:** On approve of the subscription sales order, a change order record is generated for every item that you add through the sales transaction. The change order records are on the **Change History** subtab of the subscription record.

You can also add an item to an existing subscription directly from the subscription record through a change order. For more information, see Adding a Subscription Item.

Take note of the following rules when adding items to an existing subscription:

- You cannot add an item that has a different billing mode to an existing subscription. For example, you cannot add an item with a **Fixed Date** billing mode to a subscription with items that have an **Anniversary** billing mode.
- You cannot add an item with a different termination method to an existing subscription. For example, you cannot add an item with an **End of billing period** termination method to a subscription with an **Upon cancellation** termination method.

- You cannot add an item with a different transaction type to an existing subscription. For example, you cannot add a cash sale transaction item to a subscription with invoice transaction items.

When you add an item to an existing subscription, you have the option to co-term new items with existing items. Co-term enables you to align the end dates of subscription items when adding items to existing subscriptions. For more information, see Co-termination.

Adding a Subscription Item

You can add an item to an existing subscription directly from the subscription record through a change order.

> **Note:** This feature is similar to entering a subscription sales transaction and selecting one of the **Add to Existing** options in the **Subscription Option** field on the Recurring Billing configurator. However, unlike in the sales transaction where you can add multiple items, you can only add a single item per subscription change order.
>
> Custom term and product lines are not yet supported in the Add Subscription Item change order. These features are currently only supported when using the Recurring Billing configurator on the standard opportunity, estimate, and sales order form. For more information, see Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator).

To add an item to an existing subscription through change order:

1. Go to Subscription Billing > View Records > Subscription.
2. Edit the subscription where you want to add an item.
3. Click the **Change Order** button.
4. Click **Add Subscription Item**.
5. On the Add Subscription Item change order form, specify values for the following fields.

Field Name	Description
Subscription Option	Select whether the item's billing date will align with the subscription's current cycle or next billing cycle when you add it to the subscription. ■ **Add to Existing, align with current billing close and prorate** – Adds the item to an existing subscription and adjusts its billing date to align with the current billing cycle of the subscription. Proration will be applied to charges that fall within the current billing cycle. ■ **Add to Existing, align with next billing cycle start with no proration** – Adds the item to an existing subscription and adjusts its billing date to align with the next billing cycle of the subscription. No proration will be applied to charges that fall outside of the next billing cycle.
Subscription Item	Select the item that you want to add to the subscription. Only lead items are available in this field.
Subscription Plan	Select a subscription plan that is associated with the item that you selected. Only subscription plans that meet the following criteria are available in this field: ■ Data creation label is 3.1 or higher (that is, subscription plan is migrated to or created in Recurring Billing version 3.1 or later) ■ Status is Available ■ Termination method, currency, and subsidiary is the same as the existing subscription's The values for the following fields are automatically updated with the values from the selected subscription plan: ■ Rating Frequency

<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td></td><td>Term
Quantity
Rate</td></tr>
<tr><td>Start Date</td><td>Specify a start date for the item.
Start date must meet the following conditions:
Current date or any future date
Equal to or later than the existing subscription’s start date
Note: If the Backdated Change Order feature is enabled, you can backdate up to the last subscription billing date (or subscription item start date if the item is not yet billed). Certain conditions apply when entering backdated change orders. For more information, see Backdated Subscription Change Orders.

When you select a subscription plan, the End Date field is automatically calculated based on the start date (current date by default) and the term from the subscription plan. The value in the End Date field will automatically adjust when you change the value in the Start Date field.</td></tr>
<tr><td>Discount</td><td>Enter a percentage discount for the line item. This will be applied only to items where the Allow Line Discount box is checked. Value for percentage discount can be any positive value up to 100, excluding zero.
This field is optional.</td></tr>
<tr><td>Location</td><td>Select a location for the item.

Note: This field is required only if you enabled the Locations feature. The list is blank if the Locations feature is disabled.</td></tr>
<tr><td>Co-Term</td><td>Select a co-term alignment option.
Co-term enables you to align the end date of subscription items when adding to existing subscriptions.
Add new item but no co-term alignment – Adds the new item to an existing subscription without aligning the end dates.
Align new item’s co-term with existing subscription – Adds the new item and aligns its end date to the existing subscription item’s end date.
Align existing item’s co-term with newly added item – Adds a new item to an existing subscription and aligns the existing subscription item’s end date to the new item’s end date.
If you choose to align the end dates, a popup window appears with the available primary subscription items for co-term. Select an item to co-term with and click Save.
For more information on co-term, see Co-termination.</td></tr>
<tr><td>Tax</td><td>Select a tax code for the item.</td></tr>
<tr><td>Start Type</td><td>Select a start type for the item.
Immediate – Creates the subscription item with a status of Open. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Open when the start date is equal to the current date.
Suspended – Creates the subscription item and sets its status to Suspended upon creation. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Suspended when the start date is equal to the current date.</td></tr>
</table>

Field Name	Description
	For more information on creating subscription items in suspended state, see Creating Subscription Items in Suspended State.

6. If you want to specify a custom rate, discount, or new quantity for the subscription plan items in the selected plan, click the **Customize Subscription Price** button. This option is the same as the **Customize Subscription Price** button on the Recurring Billing configurator. For more information, see Custom Pricing.

   The Customize Subscription Price window displays the list of subscription plan items in the plan and allowable custom pricing actions for each item. The **Allow Line Discount** and **Allow Custom Rate** columns show if these custom pricing actions are enabled for the item.

   Select a subscription plan item and specify the customization that you want to apply.

Customize Subscription Price Field	Description
New Quantity	Enter a new quantity for a fixed usage item. Value for quantity can be any positive value or zero. This field is applicable only to fixed usage items.
New Discount	Enter a percentage discount for the item. Value for percentage discount can be any positive value between 0 to 100, excluding 0 and 100. When you specify a custom discount, the charges are computed in the following order: rate is multiplied by quantity or usage, the resulting charge is evaluated against the minimum and maximum thresholds, then percentage discount is applied.
New Rate	Enter a custom rate for the item. Value for rate can be a positive value, negative value, or zero. For items with multiple rate plans, click the **Customize Rates** button, enter the new rates, and click **Save**. When you specify a new rate for an item with Tiered Pricing or Volume Pricing rate plan, the new rate will be applied to all tiers and the charges will be computed in the same way as Flat Rate Pricing. **Example:** ■ If you specified a new rate of $15 and the rate plan is Tiered Prices, the charges will be computed as if Flat Price is used. The amount of the charges will be $15. ■ If you specified a new rate of $15 and the rate plan used is Volume Rates, the charges will be computed as if Flat Rate is used. The amount of the charges will be $15 multiplied by quantity or usage.

   Click **Save** to apply your custom pricing adjustments.

7. Click **Save** to add the item to the subscription.

Co-termination

Co-term enables you to align the end dates of subscription items when adding items to existing subscriptions.

When you add items to an existing subscription through a sales transaction or a change order, specify a co-term option for each subscription item that you add. Co-term alignment options include:

- **Add new item but no co-term alignment** – adds the new item to an existing subscription without aligning the end dates
- **Align new item's co-term with existing subscription** – adds the new item to an existing subscription and aligns its end date to the existing subscription item's end date

> **Note:** You can align multiple new items to the same existing item. A newly added item's end date can only be truncated.

- **Align existing item's co-term with newly added item** – adds the new item to an existing subscription and aligns the existing subscription item's end date to the new item's end date

> **Note:** You can co-term an existing item with a newly added item only one time. An existing item's end date can only be extended.
>
> If a duration value is specified for the existing item, the existing item's end date can only be extended up to its duration when aligning to a newly added item.

Important Things to Note:

- Co-term is not applicable to new subscriptions. Co-term options are available only if you selected any of the Add to Existing options in the Subscription Option field on the Recurring Billing configurator. For information on how to add new items to existing subscriptions, see Entering a Subscription Sales Order and Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator).

  Co-term options are also available when you add an item to an existing subscription through a change order. For more information, see Adding a Subscription Item.
- For perpetual items, whether it is the newly added item or existing item in the subscription, the only valid co-term option is to add the new item with no co-term alignment.
- The following are the conditions for a valid co-term:
  - Subscription item is not inactive.
  - Subscription item status is Open or Pending.
  - Subscription item's renewal option is not Automatically Renew.
  - Term of the existing or newly added item is not perpetual.
  - Start date of the newly added item is within the range of the start and end dates of the existing item.

Sample Subscription Sales Order with Co-term

This example shows how co-term is applied when adding subscription items to an existing subscription on a sales order.

Step	Co-term	Item	Term	Existing Start Date	Existing End Date	New End Date
		Existing Item A	12 months	January 1, 2014	December 31, 2014	
		Existing Item B	24 months	January 1, 2014	December 31, 2015	**March 14, 2016**
		Existing Item C	36 months	January 1, 2014	December 31, 2016	
1	Add new item but no co-term alignment	New Item D	12months	March 15, 2014	March 14, 2015	
2	Align new item's co-term with existing subscription (Existing Item A)	New Item E	12 months	March 15, 2014	March 14, 2015	**December 31, 2014**
3	Align existing item's co-term with newly added item (Existing Item B)	New Item F	24 months	March 15, 2014	March 14, 2016	

Step	Co-term	Item	Term	Existing Start Date	Existing End Date	New End Date
4	Align new item's co-term with existing subscription (Existing Item A)	New Item G	12 months	March 15, 2014	March 14, 2015	**December 31, 2014**

1. Add New Item D, no co-term alignment – Original end date of New Item D is retained.
2. Add New Item E, align new item's co-term with existing subscription – A new item's end date can only be truncated, so the only valid co-term item is Existing Item A. Existing Item A is chosen as the co-term item for New Item E and both items now have an end date of December 31, 2014 (existing item's end date).
3. Add New Item F, align existing item's co-term with newly added item – An existing item's end date can only be extended. Only Existing Item B is valid for co-term with New Item F because:
   - New Item E is already aligning with Existing Item A, so Existing Item A cannot co-term with another item. It is possible to use Existing Item A again for the co-term option align new with existing, but it cannot be used for align existing with new.
   - End date of Existing Item C, which can only be extended, is later than the end date of New Item F.

   Existing Item B is chosen as the co-term item for New Item F and both items now have an end date of March 14, 2016 (new item's end date). Existing Item B is now considered reserved for co-term with New Item F and it cannot be used again to co-term with another new item.

   > **Note:** If co-term option selected for New Item F is align new with existing, then Existing Items A and B are valid items to co-term with.

4. Add New Item G, align new item's co-term with existing subscription – New Item G's end date can only be truncated, so only Existing Item A is valid for this co-term option.

   > **Note:** If the co-term option selected for New Item G is align existing with new, then there is no valid item to align with. Existing Item A and B are already reserved for co-term with other items and Existing Item C's end date, which can only be extended, is later than New Item G's end date.

Adding One-Time Subscription Charges

You can add a positive one-time charge (add-on charge) or negative one-time charge (concession charge or rebate) to a subscription through a change order. Add-on charges are usually applied for one-time setup costs, training or support fee, or administrative charges. Rebates are typically provided to compensate for unexpected outage or service flaws.

To add a one-time charge to a subscription, you must set up one-time charge types that you can add to a primary subscription item through a change order.

The one-time charge type should have a unique name and an item associated with it. The item can be any service item for sale or resale or non-inventory item for sale or resale. The item must also be available to the subsidiary of the primary subscription item where you will add the one-time charge.

To simplify transactions and records, you should set up a single item that can be used exclusively as a one-time charge item and make it available to all subsidiaries. For information on how to create item records, see the help topic Creating Item Records.

To set up a one-time charge type:

1. Go to Subscription Billing > Account Setup > Add One Time Charge Type.

2. Enter a unique name for the one-time charge type in the **Name** field. You cannot specify a name that has already been used for other one-time charge types.
3. Select an item in the **One-Time Charge Item** field. This field displays all service items and non-inventory items. However, only service items for sale or resale and non-inventory items for sale or resale are valid items for one-time charge type.

You can view a list of one-time charge types by going to Subscription Billing > Account Setup > One Time Charge Types.

To add a one-time subscription charge through a change order:

1. Go to Subscription Billing > View Records > Subscriptions.
2. View the subscription where you want to add a one-time charge.
3. On the **Subscription Items** subtab, edit the primary subscription item where you want to add a one-time charge.
4. On the primary subscription item record, click **Change Order**.
5. Select **Add One Time Charge**.

   > **Note:** Add One Time Charge is not available to subscription items with a status of Initializing, Closed, or Terminated. This change order is also not available to Migrated or Pending Renewal items whose end date has elapsed (that is, end date is before the current date).

6. On the Add One Time Charge change order form, specify a value for the following fields:
   - **Billing Effective Date** – Specify when the one-time charge will be billed. This date is also the start and end dates of the one-time charge.

     Billing effective date must be equal to or later than the last item billing date. If there is no last item billing date (that is, item has not yet been billed or item status is Pending), billing effective date must be equal to or later than the item start date. For non-perpetual items, it must be earlier than or equal to the term end date.

     For more information, see Billing Effective Date for One-Time Charge.
   - **Charge Type** – Specify a one-time charge type. This field displays one-time charge types associated with items that are available to the primary subscription item's subsidiary.
   - **Amount** – Specify the one-time charge amount. The amount can be any value from -9,999,999.99 through 9,999,999.99.
   - **Description** – Enter a description for the one-time charge.
7. Click **Save**.

The Add One Time Charge change order is effective immediately. To see a list of one-time charges applied to a subscription item, go to the primary subscription item record and click the One-Time Charges subtab.

> **Note:** Both the **Subscription Item Pri** (primary) and **Subscription Item Sec** (secondary) fields of the charge record for a one-time charge show the internal ID of the primary subscription item where the one-time charge is added.

If a one-time charge has a billing effective date that is earlier than the next billing date of the subscription, the next billing date will adjust to the one-time charge's billing effective date.

> **Important:** After a one-time charge has been created, you cannot edit or cancel it. If you made a mistake in the amount you specified on a previous one-time charge, you can apply another one-time charge to correct or offset the first amount, preferably with the same billing effective date so they will reflect in the same billing.
>
> For example, if you created a one-time charge of 100 but the correct amount should have been 80, you can apply another one-time charge with an amount of -20 to the same subscription item to correct the first amount. Note that this action will generate an invoice with an amount of 100 and a credit memo with an amount of 20.

Billing Effective Date for One-Time Charge

The Billing Effective Date field determines when the one-time charge will be billed. This date is also the start and end dates of a one-time charge.

The permitted values for this field vary depending on the subscription item status.

The following table shows the restrictions on the billing effective date of a one-time charge based on the subscription item's status.

Subscription Item Status	Add One Time Charge Available?	Permitted Values for Billing Effective Date	One-Time Charge Created?
Initializing	No	—	—
Pending	Yes	Equal to or later than item start date For non-perpetual items, it must also be earlier than or equal to the item end date	Yes Charge Stage: Ready
Open	Yes	Equal to or later than last item billing date (if no last item billing date, it must be equal to or later than the item start date) For non-perpetual items, it must also be earlier than or equal to the item end date	Yes Charge Stage: Ready
Suspended	Yes	Equal to or later than last item billing date (if no last item billing date, it must be equal to or later than the item start date) For non-perpetual items, it must also be earlier than or equal to the item end date	Yes Charge Stage: Hold
Pending Renewal	Yes (if the subscription item end date is not yet reached)	Equal to or later than last item billing date (if no last item billing date, it must be equal to or later than the item start date) Earlier than or equal to the item end date	Yes Charge Stage: Ready
Pending Migration	Yes	Equal to or later than last item billing date (if no last item billing date, it must be equal to or later than the item start date) Earlier than or equal to the migration date	Yes Charge Stage: Ready
Pending Termination	Yes	Equal to or later than last item billing date (if no last item billing date, it must be equal to or later than the item start date) Earlier than or equal to the termination date **Important:** You should set the one-time charge's billing effective date to the same date as the termination date to avoid any billing issues.	Yes Charge Stage: Ready
Terminated	No	—	—

Subscription Item Status	Add One Time Charge Available?	Permitted Values for Billing Effective Date	One-Time Charge Created?
Closed	No	—	—

The billing effective date can also change if a different change order action is applied on the subscription item.

The following table shows how other change order actions affect one-time charges.

Change Order Action	Effect on One-Time Charge	Example
Modify Start Date	If billing effective date is later than the new item start date, it will be retained.	**Example 1: Billing effective date is later than the new item start date** Original start date: 3/15/2014 Billing effective date: 3/15/2014 —Modify Start Date— New start date: 3/1/2014 Billing effective date: 3/15/2014 (retained)
	If billing effective date is earlier than the new item start date, it will be adjusted.	**Example 2: Billing effective date is earlier than the new item start date** Original start date: 3/15/2014 Billing effective date: 3/15/2014 —After Modify Start Date— New start date: 4/1/2014 Billing effective date: 4/1/2014 (moved)
Terminate Subscription Item	If billing effective date is earlier than or equal to the termination date, it will be retained.	**Example 3: Billing effective date is earlier than termination date** Billing effective date: 4/1/2014 Termination date: 5/1/2014 Result: One-time charge will be billed on 4/1/2014.
	If billing effective date is later than the termination date, the one-time charge amount will be set to zero.	**Example 4: Billing effective date is later than termination date** Billing effective date: 4/1/2014 Termination date: 3/20/2014 Result: One-time charge amount will be set to zero.
Migrate Subscription Plan	If billing effective date is earlier than or equal to the migration date, it will be retained.	**Example 5: Billing effective date is earlier than migration date** Billing effective date: 4/1/2014 Migration date: 5/1/2014 Result: One-time charge will be billed on 4/1/2014.
	If billing effective date is later than the migration date, it will be carried over to the new plan.	**Example 6: Billing effective date is later than migration date** Billing effective date: 4/1/2014 Migration date: 3/20/2014 Result: One-time charge will be carried over and charged to the new plan.
Suspend Subscription Item	If billing effective date is earlier than or equal to the suspension date, it will be retained.	**Example 7: Billing effective date is earlier than suspension date** Billing effective date: 4/1/2014 Suspension date: 4/15/2014 Result: One-time charge will be billed on 4/1/2014.
	If billing effective date is later than the suspension date, the charge stage of the one-time charge will be set to Hold. It	**Example 8: Billing effective date is later than suspension date** Billing effective date: 4/1/2014 Suspension date: 3/15/2014

Change Order Action	Effect on One-Time Charge	Example
	will be set back to Ready upon reactivation.	Result: Charge stage of the one-time charge will be set to Hold upon suspension on 3/15/2014. It will be set back to Ready upon reactivation.
Reactivate Subscription Item	Charge stage of the one-time charge will change from Hold to Ready upon reactivation. Proration is not applied on one-time charges.	**Example 9: Effect of Suspend-Reactivate on One-Time Charge** Suspension date: 3/15/2014 Billing effective date: 4/1/2014 (Charge stage: Hold) —Reactivate Subscription Item— Reactivation date: 4/15/2014 Billing effective date: 4/1/2014 (Charge stage: Ready) Result: Charge stage of the one-time charge will change from Hold to Ready upon reactivation on 4/15/2014.

Note: The following change orders has no direct effect on one-time charges: Add Subscription Item, Modify Quantity for Fixed Usage, Renew Subscription Item, and Modify Subscription Item Rate.

Custom Pricing

The Recurring Billing SuiteApp supports the following custom pricing actions:

- Configuring Subscription Item Rate – Specifying a custom rate, discount, or quantity on a sales transaction. This feature is also supported on the Add Subscription Item and Migrate Subscription Plan change orders.
- Modifying Subscription Item Rate – Modifying the rate, discount, or uplift through the Modify Subscription Item Rate change order.

Note: The current version of the Recurring Billing SuiteApp only supports custom pricing for secondary subscription items.

To allow a custom pricing action on a subscription plan item, check its corresponding box on the subscription plan item record:

- **Allow Line Discount** – check this box if you want to allow discounting for the item
- **Allow Custom Rate** – check this box if you want to allow specifying a custom rate for the item
- **Allow Item Uplift** – check this box if you want to allow price uplift for the item

For more information, see Setting Up Subscription Plan Items.

Configuring Subscription Item Rate

You can specify a negotiated price, discount, or new quantity for a subscription item directly on a subscription sales transaction (opportunity, estimate, or sales order) without modifying or setting up a new rate plan.

This feature is also supported on the Add Subscription Item and Migrate Subscription Plan change orders. For more information, see Adding a Subscription Item and Migrating Customers and Items to a New Subscription Plan.

To specify a custom rate, discount, and quantity for a subscription item on a sales transaction:

1. Create a new opportunity, estimate, or sales order. Read the following help topics for more information:

- Entering a Subscription Opportunity
- Entering a Subscription Estimate
- Entering a Subscription Sales Order

2. On the **Items** subtab, select a line item in the **Item** column and check the box in the **Configure Subscription** column to open the Recurring Billing configurator.
3. On the configurator, select a subscription plan that is associated with the selected line item.
4. Click the **Customize Subscription Price** button. The Customize Subscription Price window displays the list of subscription plan items in the plan and allowable custom pricing actions for each item.
5. Select a subscription plan item and specify the customization that you want to apply:

> **Note:** The **Allow Line Discount** and **Allow Custom Rate** columns show if these custom pricing actions are enabled for the item. For more information, see Setting Up Subscription Plan Items.

Field Name	Description
New Quantity	Enter a new quantity for a fixed usage item. Value for quantity can be any positive value or zero. This field is applicable only to fixed usage items.
New Discount	Enter a percentage discount for the item. Value for percentage discount can be any positive value between 0 to 100, excluding 0 and 100. When you specify a custom discount, the charges are computed in the following order: rate is multiplied by quantity or usage, the resulting charge is evaluated against the minimum and maximum thresholds, then percentage discount is applied.
New Rate	Enter a custom rate for the item. Value for rate can be a positive value, negative value, or zero. For items with multiple rate plans, click the **Customize Rates** button, enter the new rates, and click **Save**. When you specify a new rate for an item with Tiered Pricing or Volume Pricing rate plan, the new rate will be applied to all tiers and the charges will be computed in the same way as Flat Rate Pricing. **Example:** - If you specified a new rate of $15 and the rate plan is Tiered Prices, the charges will be computed as if Flat Price is used. The amount of the charges will be $15. - If you specified a new rate of $15 and the rate plan used is Volume Rates, the charges will be computed as if Flat Rate is used. The amount of the charges will be $15 multiplied by quantity or usage.

6. Click **Save**.
7. Click **Add**.
8. Enter additional subscription items and custom pricing adjustments as needed.

> **Important:** Even if the line item has an end date (that is, the term is not perpetual), all custom pricing adjustments (except for uplift) will be carried over after renewal unless you migrate to a new plan.

The Adjustment History subtab on the subscription record shows the custom pricing changes that are not part of the original subscription plan.

Modifying Subscription Item Rate

You can modify the rate, discount, and uplift for a subscription item through a change order. The Modify Subscription Item Rate change order enables you to charge a different price for the item starting on the date you specified, without modifying or setting up a new rate plan.

To modify the rate, discount, and uplift for a subscription item through a change order:

1. Go to Subscription Billing > View Records > Subscription.
2. View the subscription that contains the subscription item that you want to modify.
3. On the **Subscription Items** subtab, edit the subscription item that you want to modify.

   > **Note:** The current version of the Recurring Billing SuiteApp supports custom pricing only for secondary subscription items.

4. Click the **Change Order** button on the subscription item record.

   > **Note:** The **Change Order** button appears only if one or more custom pricing actions (Allow Line Discount, Allow Custom Rate, or Allow Item Uplift) is enabled for the subscription item. For more information, see Setting Up Subscription Plan Items.

5. Click **Modify Subscription Item Rate**. Only enabled custom pricing actions for the item appears on the Modify Subscription Item Rate change order form.
6. Under Dates, specify values for the following fields:

Field Name	Description
Effective Date	Specify when the change order will be executed. This field is required. Effective date must be current date or any future date. **Note:** If the Backdated Change Order feature is enabled, you can backdate up to the last subscription billing date (or subscription item start date if the item is not yet billed). Certain conditions apply when entering backdated change orders. For more information, see Backdated Subscription Change Orders.
Start Date	Specify when the custom pricing adjustment will be applied. This field is required. Start date must be equal to or later than the effective date. **Note:** **Effective Date** is the date when the change order action takes effect (that is, the change order status is no longer pending). **Start Date** is the date when the price changes are applied to the charges. For example, for a custom pricing change order with an effective date of January 1, 2014, you entered an uplift of 5% with a start date of April 1, 2014. The change order status is no longer pending starting January 1, 2014. The 5% uplift will be applied only to charges starting April 1, 2014.
End Date	Specify an end date for the custom pricing adjustment. This field is optional and applicable only to discount and uplift. End date must be equal to or later than the start date.

Field Name	Description
	Note: If this field is blank and the subscription item has an end date (that is, term is not perpetual), all custom pricing adjustments (except for uplift) will be carried over after renewal unless you migrate to a new plan.

Important Things to Note:

- Charges for the period where the effective date, start date, and end date fall must be available when you create the change order.
- Mid-period adjustment for variable items is not supported. Adjustment start and end dates for variable items must coincide with any future period start and end dates. Custom pricing adjustments for variable usage items will be reflected only after the rating engine has run.

7. Specify the customization that you want to apply to the item:

Adjustment Type	Action	Allowed Values	Important Things to Note
Discount	Check the **Apply Discount** box. Enter a value for percentage discount in the **Discount Value** field.	Any positive value up to 100, excluding zero	Only one value for discount is applicable at any particular period. If you specify a new discount, the end date of the previous discount will be set to one day before the start date of the new discount, unless an earlier end date was specified. The new discount must have a start date that is later than the start date of the previous discount. For more information, see Sample Custom Pricing Adjustment.
Uplift	Check the **Apply Uplift** box. Enter a value for percentage uplift in the **Uplift Value** field. You can check the **Adjust Rate Based On Previous Total Amount** box if you want to adjust the rate based on the actual total amount for the previous period.	Any positive value or any negative value down to -100, excluding zero	Multiple uplifts are compounded. For **Adjust Rate Based on Previous Total Amount** box, take note of the following: ■ If this box is checked, two Modify Subscription Item Rate change orders will be created. The first change order applies the uplift. When the status of the uplift change order is Completed, a second change order is created to adjust the rate for the next period. The rate for succeeding periods will be based on the actual total amount for the previous period, including prorated amounts for mid-period price changes. ■ If this box is cleared, only the Modify Subscription Item change order for uplift will be created. When the uplift is applied to succeeding periods, the original rate will be used as the base amount for the uplift. For more information, see Sample for Uplift with Adjustment for Rate Based on Previous Total Amount.
Custom Rate	Under **Rate Plans** sublist, enter a new rate in the appropriate rate plan field.	Any positive value, negative value, or zero.	Only one value for rate is applicable at any particular period. If you specify a new rate, the end date of all previous adjustments will be set to one day before the start date of the new rate, unless an earlier end date was specified for discount and uplift. The new rate must have a start date that is later than the start date of the previous rate. For more information, see Sample Custom Pricing Adjustment. When you specify a new rate for an item with Tiered Pricing or Volume Pricing rate plan, the new rate will be applied to all tiers and the charges will be computed in the same way as Flat Rate Pricing.

Adjustment Type	Action	Allowed Values	Important Things to Note
			Example: ▪ If you specified a new rate of $15 and the rate plan is Tiered Prices, the charges will be computed as if Flat Price is used. The amount of the charges will be $15. ▪ If you specified a new rate of $15 and the rate plan used is Volume Rates, the charges will be computed as if Flat Rate is used. The amount of the charges will be $15 multiplied by quantity or usage.

8. Click **Save**.

If three pricing adjustments are applied to a subscription item, the rate will be computed in the following order: new rate is applied, uplift, and then discount.

When a subscription is billed in advance and a custom pricing adjustment start date falls within a period that has already been billed, the subscription next billing date reverts back to the previous billing date so you can charge or refund the customer for the price difference. To generate the invoice or credit memo for the adjustment, you can click the **Run Billing** button on the subscription record or you can wait for the billing engine to run. For more information, see Generating an Invoice for a Specific Customer Subscription and Applying Credit Memos.

Sample Custom Pricing Adjustment

In this example, the item has a start date of January 1, 2014 and end date of June 30, 2014 (six month term), with monthly billing and rating frequencies.

The following table shows the custom pricing adjustments applied on the item. Item rate is 100.

Sequence	Adjustment	Start Date	End Date
[1]	Discount 1 = 10%	1/10/2014	(3/31/2014) **Note:** End date is initially empty but it will be set when Discount 2 is added. Only one value for discount is applicable at any particular period.
[2]	Uplift 1 = 5%	3/1/2014	(4/30/2014) **Note:** End date is initially empty but it will be set when Rate 1 is added. When a new rate is specified, all previous adjustments will be set to one day before the start date of the new rate.
[3]	Discount 2 = 8%	4/1/2014	4/30/2014
[4]	Uplift 2 = 10%	4/1/2014	4/30/2014
[5]	Rate 1 = 150	5/1/2014	
[6]	Discount 3 = 15%	6/1/2014	

The following table shows how the charges are computed per period.

Period	Applicable Custom Pricing Adjustment	How Charge Amount is Computed
1/1/2014 to 1/31/2014	[0] No adjustment for 1/1/2014 to 1/9/2014 (9 out of 31 days) [1] Apply Discount 1 = 10% for 1/10/2014 to 1/31/2014 (22 out of 31 days) **Note:** Discount 1 has a start date of 1/10/2014 and has no end date initially. But when Discount 2 is specified later on with a start date of 4/1/2014, the end date of Discount 1 is set to 3/31/2014 (one day before the start date of Discount 2). The charge for this period is split into two charges, one charge for the period with no adjustment and another charge for the period with discount.	Rate = 100 [0] Rate = 100*(9/31) = 29.03 **[0] Charge Amount = 29.03** [1] Rate = 100*(22/31)*(1-0.10) = 63.87 **[1] Charge Amount = 63.87**
2/1/2014 to 2/28/2014	[1] Apply Discount 1 = 10% (end on 3/31/2014)	Rate = 100 [1] Rate = 100-(100*0.10) = 90 **Charge Amount = 90**
3/1/2014 to 3/31/2014	[2] Apply Uplift 1 = 5% (start on 3/1/2014, no end date initially) [1] Apply Discount 1 = 10% (end on 3/31/2014) **Note:** Uplift is applied before discount.	Rate = 100 [2] Rate = 100+(100*0.05) = 105 [2, 1] Rate = 105–(105*0.10) = 94.5 **Charge Amount = 94.5**
4/1/2014 to 4/30/2014	[2] Apply Uplift 1 = 5% (no end date initially) [4] Apply Uplift 2 = 10% (start on 4/1/2014, end on 4/30/2014) [3] Apply Discount 2 = 8% (start on 4/1/2014, end on 4/30/2014) **Note:** Multiple uplifts are compounded. Uplift is applied before discount.	Rate = 100 [2] Rate = 100+(100*0.05) = 105 [2, 4] Rate = 105+(105*0.10) = 115.5 [2, 4, 3] Rate = 115.5-(115.5*0.08) = 106.26 **Charge Amount = 106.26**
5/1/2014 to 5/31/2014	[5] Apply Rate 1 = 150 (start on 5/1/2014) **Note:** All previous adjustments have an end date that is earlier than the start date of the Rate 1, except for Uplift 1, which doesn't have an end date initially. When Rate 1 is specified with a start date of 5/1/2014, the end date of Uplift 1 is set to 4/30/2014 (one day before the start date of Rate 1).	[5] Rate = 150 **Charge Amount = 150**
6/1/2014 to 6/30/2014	[5] Apply Rate 1 = 150 [6] Apply Discount 3 = 15% (start on 6/1/2014, no end date)	[5] Rate = 150 [5, 6] Rate = 150-(150*0.15) = 127.5 **Charge Amount = 127.5**

Sample for Uplift with Adjustment for Rate Based on Previous Total Amount

In this example, the subscription item has a start date of January 1, 2016 and an end date of December 31, 2018 (term is 36 months), with yearly billing and rating frequencies.

The following table shows the charge per period upon creation of the subscription. Item rate is 1000.

Period Start Date	Period End Date	Amount
January 1, 2016	December 31, 2016	1000
January 1, 2017	December 31, 2017	1000

Period Start Date	Period End Date	Amount
January 1, 2018	December 31, 2018	1000

A Modify Subscription Item Rate change order for a 10% uplift is applied starting July 1, 2016. The following table shows the charges when the uplift is applied, and the difference when the **Adjust Rate Based on Previous Total Amount** box is cleared or checked. Take note of the following:

- The charge for the first period is split into two and the amounts are prorated. The first charge shows the original amount (without uplift) for the first half of the period. The second charge shows the amount with uplift for the second half of the period.
- If the **Adjust Rate Based on Previous Total Amount** box is cleared, the rates for the second and third periods are based on the original rate plus 10% uplift, which is 1000 + (1000*0.10) = 1100.
- If the **Adjust Rate Based on Previous Total Amount** box is checked, the rates for the second and third periods are based on the actual total amount for the previous period, which is 497.27 + 553.01 = 1050.28.

Period Start Date	Period End Date	Charge Amount when Adjust Rate Based on Previous Total Amount Box is cleared	Charge Amount when Adjust Rate Based on Previous Total Amount Box is checked
January 1, 2016	June 30, 2016	497.27	497.27
July 1, 2016	December 31, 2016	553.01	553.01
January 1, 2017	December 31, 2017	1100	1050.28
January 1, 2018	December 31, 2018	1100	1050.28

Extending the End Date of a Subscription Item

You can extend the end date of a subscription item through a change order. The Extend Subscription Item End Date change order is available for subscription items that meet the following conditions:

- Subscription item term is not perpetual.
- Subscription item status is Pending, Open, or Suspended.
- Subscription item end date is not earlier than the current date.

> **Note:** Values for pending analytics may be inaccurate when extend subscription item end date is applied to suspended subscriptions or to subscriptions with pending (future-dated) change orders.

To extend the end date of a subscription item:

1. Edit the subscription or primary subscription item record:
   - To edit the subscription record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, edit the subscription that contains the subscription item that you want to modify.
   - To edit the primary subscription item record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, view the subscription that contains the primary subscription item. On the subscription record, edit the primary subscription item that you want to modify.
2. Click the **Change Order** button.

3. Click **Extend Subscription Item End Date**.
4. In the **New End Date** field, specify a new end date for the subscription item. The new end date must satisfy the following conditions:
   - Must be later than the original end date
   - Must not be more than 120 months from the subscription item start date

   > **Note:** If the item originally has a term of less than 48 months (that is, minimum term has not been set previously) and the new end date results to a term that is more than 36 months, a default minimum term of 36 months is set.
5. Click **Save**.

This change order is effective immediately and cannot be canceled. The new end date is applied to the primary item and its secondary subscription items (as applicable, depending on the duration and offset values). Creation of charges for the extension period depends on the billing mode of the subscription:

- For anniversary subscriptions, only the subscription item end dates are updated upon execution of the change order. Creation of charges for the extension period will depend on the notice period for the item and on the succeeding run of the SWV_SB_SS_CCScheduler.
- For fixed date subscriptions, the SWV_SB_SS_CCScheduler script runs after the execution of the change order to create charges for the extension period.

Migrating Customers and Items to a New Subscription Plan

The Recurring Billing SuiteApp lets you migrate a customer or a group of customers to a new subscription plan.

This feature enables you to do the following:

- Migrate a single customer subscription to a new subscription plan
- Migrate all customers using a specific subscription plan to a new subscription plan
- Migrate a set of customers with similar attributes and that uses a specific subscription plan to a new subscription plan
- Plan migration to downsell a customer subscription or group of customers' subscriptions
- Plan migration to upsell a customer subscription or group of customers' subscriptions

> **Note:** Subscription plan migration is currently not supported for subscription plans that are linked to a product line.

Read the following topics for information about the Migrate Subscription Plan change order:

- Conditions for Migrate Subscription Plan Change Order
- Migrating a Subscription Item to a New Subscription Plan
- Migrating Customers to a New Subscription Plan

Conditions for Migrate Subscription Plan Change Order

For single plan migration, you can migrate subscription items that satisfy the following conditions:

- Status is Open.
- Next billing date is the current date or any future date.
- End date is blank, the current date, or any future date.

For single and bulk plan migration, you can migrate to subscription plans that satisfy the following conditions:

- Must be approved and available.

- Has the same lead item as the current plan.
- Has the same billing mode as the current plan. For more information, see Billing Modes.
- Has the same currency as the current plan.
- Has the same termination method as the current plan.
- Has the same subsidiary as the current plan. Subsidiaries are available only in the OneWorld version of NetSuite.
- Has a billing frequency that can be aligned with the billing frequency of the current plan.

Migrating a Subscription Item to a New Subscription Plan

You can migrate a subscription item to a new subscription plan by applying a change order from the primary subscription item record.

To migrate a single subscription item to a new subscription plan:

1. Go to Subscription Billing > View Records > Subscription.
2. View the subscription that contains the subscription item that you want to migrate.
3. On the **Subscription Items** subtab, click **Edit** next to the primary subscription item that you want to migrate to a new plan.
4. On the primary subscription item record, click the **Change Order** button.
5. On the Change Order window, click **Migrate Subscription Plan**.
6. Follow the steps on the Migrate to New Plan window:
    1. Step 1: Select New Plan
        a. Select a new plan by checking the box next to the subscription plan that you want to migrate to. For information about how the subscription plan list is filtered, see Conditions for Migrate Subscription Plan Change Order.

        b. If you want to specify a custom rate, discount, or quantity for the subscription plan items in the new plan, click the **Customize Subscription Price** button. The Customize Subscription Price window displays the list of subscription plan items and allowable custom pricing actions for each item. The Allow Line Discount and Allow Custom Rate columns show if these custom pricing actions are enabled for the item.

        To apply a custom pricing adjustment, select an item and specify the new rate, discount, or quantity that you want to apply.

Field Name	Description
New Quantity	Enter a new quantity for a fixed usage item. Value for quantity can be any positive value or zero. This field is applicable only to fixed usage items.
New Discount	Enter a percentage discount for the item. Value for percentage discount can be any positive value between 0 to 100, excluding 0 and 100.
New Rate	Enter a custom rate for the item. Value for rate can be a positive value, negative value, or zero. For items with multiple rate plans, click the **Customize Rates** button, enter the new rates, and click **Save**.

> **Note:** The custom pricing options in the Migrate Subscription Plan change order is the same as the Customize Subscription Price options on the Recurring Billing configurator. For information about custom pricing adjustments, see Configuring Subscription Item Rate.

After entering your custom pricing adjustments, click **Save**.

c. Click **Next**.

2. Step 2: Migration Dates
   a. In the **Effective From** field, select when the migration becomes effective.
      - **Next Billing Period** – Select this option if you want to set the effective date of the plan migration at the start of the next billing period. The **Migration Date** field is automatically set to the start date of the next billing period.
      - **Specific Date** – Select this option if you want to set the effective date of the plan migration to a date other than the start of the next billing period. The **Migration Date** field defaults to the day after the current date. You can then change the date to any future date.

      > **Note:** If the Backdated Change Order feature is enabled, you can backdate up to one day after the last subscription billing date (or one day after the subscription item start date if the item is not yet billed). Certain conditions apply when entering backdated change orders. For more information, see Backdated Subscription Change Orders.

   b. By default, the **End Date** field shows the end date based on the migration date that you specified and the new subscription plan's term. You can accept the default value or change the value to a custom end date. Custom end date must be:
      - Not less than one rating period from the migration date, based on the new subscription plan's rating frequency.
      - Not more than 120 months from the migration date.

      If you specify a custom end date, the value in the **Term** field changes to **Custom Term**. If you set the **End Date** field to blank, the value in the **Term** field changes to **Perpetual**.

      > **Note:** If the new subscription plan originally has a term of less than 48 months (that is, minimum term and notice period have not been set previously) and the custom end date results to a term that is more than 36 months, a default minimum term of 12 months is set for the migrated item. Setting a notice period value for the migrated item is not yet supported in the Migrate Subscription Plan change order. By default, the migrated subscription item will use the notice period value from the new subscription plan.
      >
      > For subscription plans with renewal settings, the term upon renewal will still follow the renewal settings from the new subscription plan (not the custom term).

   c. Click **Next**.
3. Step 3: Select Plan Migration Template

a. In the **Template** field, select a template that contains preset values for the fields in this step. To create a new plan migration template, go to Subscription Billing > View Records > Migration Plan > New.

b. If you did not specify a template, you can manually set the values for the fields in this step.

- Check the **Prorate on Migration** box if you want to apply proration on the charges for the last billing period of the item to be migrated. Proration is applicable only if you selected a migration date that does not coincide with the next billing period start date.

  Clear the **Prorate on Migration** box if you want to apply proration based on the settings of the subscription item to be migrated.

- Select an option from the **Termination Fees** field. This field is required if the old subscription plan, the new subscription plan, or both subscription plans have a termination fee item.

  - Select **Maintain Original** if you do not want to charge a penalty when you terminate the item from the old plan before migrating to a new plan. The amount of the termination penalty will be carried over to the new plan.
  - Select **Charge original and keep new plan's** if you want to charge a penalty when you terminate the item from the old plan before migrating to the new plan. The new termination penalty amount will be based on the termination penalty specified in the new plan.
  - Select **Charge original and do not keep new plan's** if you want to charge a penalty when you terminate the item from the old plan before migrating to the new plan. No penalty will be charged to the subscription item on the new plan.
  - Select **Use new plan's** if you do not want to charge a penalty when you terminate the item from the old plan. The new termination penalty amount will be based on the termination penalty specified in the new plan.

> **Note:** If you specified a custom pricing adjustment for the new subscription plan's termination fee item and you selected **Maintain Original** or **Charge original and do not keep new plan's** in the **Termination Fees** field, the pricing adjustment will be discarded.

> **Note:** If the new subscription plan contains only termination fee items, only **Charge original and keep new plan's** and **Use new plan's** are shown as valid options in the **Termination Fees** field.

c. Click **Next**.

4. Step 4: Review and Submit

a. Review the summary of the plan migration settings that you specified in the previous steps.

b. To view a summary of custom pricing adjustments, click the link in the **Pricing Adjustments** field.

c. Click the **Back** button if you want to make changes to the migration settings.

d. Click the **Finish** button if you want to apply the plan migration settings. A confirmation message appears at the top of the subscription item record confirming that the item will be migrated to a new subscription plan at the specified date.

Note: If an uplift is applied to one of the subscription items from the old plan, it will not be carried over during plan migration.

Migrate Subscription Plan change orders are processed one day before the migration date that you specified on the change order.

When the Migrate Subscription Plan change order status changes to Succeeded:

- The status of the primary subscription item to be migrated will change to Pending Migration.
- The new primary subscription item will initially have a status of Initializing while its secondary subscription items and their first charge are still being created by the scheduled script SWV_SB_SS_SecondarySubItemGenerator. After the secondary subscription items and its first charge have been created, the status of the new primary subscription item will change to Pending. The scheduled script SWV_SB_SS_CreateCharges then creates the remaining charges for the new secondary subscription items based on the term (or minimum term) of the new subscription plan.
- The subscription status will also change to Initializing while the new items are still being created. After the new items and their first charge are created, the status of the subscription will change back to Open.

When the Migrate Subscription Plan change order status changes to Completed on the specified migration date:

- The new primary subscription item status will change from Pending to Open.
- During a bill run operation, the status of the old primary subscription item will change from Pending Migration to Migrated.
- The subscription status will remain Open.

Migrating Customers to a New Subscription Plan

You can perform bulk plan migration to move customers using a specific subscription plan to a new subscription plan.

To migrate customers to a new subscription plan:

1. Go to Subscription Billing > View Records > Subscription Plan.
2. Select the subscription plan from which you want to remove your customers.
3. On the subscription plan record, click the **Migrate Plan** button. This button is available only for subscription plans with existing customer subscriptions.
4. Follow the steps on the Migrate to New Subscription Plan window.
    1. Step 1: Select New Plan
        a. Select a new plan by checking the box next to the subscription plan that you want to migrate to. For information about how the subscription plan list is filtered, see Conditions for Migrate Subscription Plan Change Order.
        b. Click **Next**.
    2. Step 2: Choose Customers
        a. Select the customers that you want to migrate to the new subscription plan:
            - Select **All Customers** if you want to migrate all customers using the existing plan to the new plan.
            - Select **Customer List** and then select a saved search to filter the list of customers to migrate using a preset criteria. The list at the middle of the window is populated with a list of customer filter based on the criteria that you selected. You can individually select customers from the list or you can check the **Select All in Customer List** box to select all customers on the list.

   b. Click **Next**.

3. Step 3: Migration Dates

   a. In the **Effective From** field, select when the migration becomes effective.

      - **Next Billing Period** – Select this option if you want to set the effective date of the plan migration at the start of the next billing period. The **Date** field is automatically set to the start date of the next billing period.

      - **Specific Date** – Select this option if you want to set the effective date of the plan migration to another date other than the start of the next billing period. The **Date** field defaults to the day after the current date. You can then change the date to any future date.

      > **Note:** If the Backdated Change Order feature is enabled, you can backdate up to one day after the last subscription billing date (or one day after the subscription item start date if the item is not yet billed). Certain conditions apply when entering backdated change orders. For more information, see Backdated Subscription Change Orders.

   b. Click **Next**.

4. Step 4: Select Plan Migration Templates

   a. In the **Template** field, select a template that contains preset values for the fields in this step. To create a new plan migration template, go to Subscription Billing > View Records > Migration Plan > New.

   b. If you did not specify a template, you can manually set the values for the fields in this step.

      - Check the **Prorate on Migration** box if you want to apply proration on the charges for the last billing period of the item to be migrated. Proration is applicable only if you selected a migration date that does not coincide with the next billing period start date.

        Clear the **Prorate on Migration** box if you want to apply proration based on the settings of the old subscription plan.

      - Select an option from the **Termination Fees** field:

        - Select **Maintain Original** if you do not want to charge a penalty when you terminate the items from the old plan before migrating customers to a new plan. The amount of the termination penalty will be carried over to the new plan.

        - Select **Charge original and keep new plan's** if you want to charge a penalty when you terminate the items from the old plan before migrating customers to the new plan. The new termination penalty amount will be based on the termination penalty specified in the new plan.

        - Select **Charge original and do not keep new plan's** if you want to charge a penalty when you terminate the items from the old plan before migrating customers to the new plan. No penalty will be charged to the subscription items on the new plan.

        - Select **Use new plan's** if you do not want to charge a penalty when you terminate subscription items from the old plan. The new termination penalty amount will be based on the termination penalty specified in the new plan.

> **Note:** If the new subscription plan contains only termination fee items, only **Charge original and keep new plan's** and **Use new plan's** are shown as valid options in the **Termination Fees** field.

   c. Click **Next**.

5. Step 5: Review and Submit
   a. Review the summary of the plan migration settings that you specified in the previous steps.
   b. Click **Back** if you want to make changes to the migration settings.
   c. Click **Finish** if you want to apply the plan migration settings. A confirmation message appears at the top of the subscription plan record confirming that the customers will be migrated a new subscription plan at the specified date.

Modifying the Quantity of Fixed Usage Items

Fixed Usage is a usage type wherein the amount of usage unit used by the customer does not change from rating period to rating period. The seat licensing model is an example of a subscription that uses fixed usage.

Setting Up Fixed Usage

You can enable fixed usage on the rate plan. Check the Usage box on the rate plan to enable fixed usage for items that will use the rate plan. For more information on enabling fixed usage, see Setting Up Rate Plans.

When you set up a subscription plan item:

- In the Charge Type field, select Fixed Usage.
- In the Rate Plan field, select a usage-enabled rate plan.
- In the Quantity field, set the amount of fixed usage units to allocate to a subscription plan item per rating period.

For more information on setting up subscription plan items, see Setting Up Subscription Plan Items.

The billing system applies the rating model specified in the rate plan to the usage quantity in the subscription to compute for the usage charge.

Updating the Fixed Usage Quantity

You can update the fixed usage quantity of a usage-based item from the subscription record.

You can only update the preset usage quantity of a subscription item that:

- has a Fixed Usage charge type
- has a next billing date that is later than the current date
- has an Open or Pending Renewal status
- if already billed, has a start date that does not fall on the same date set on the effectivity date option
- has proration enabled

To update the fixed usage quantity of an item:

1. Go to Subscription Billing > View Records > Subscription.

2. View the subscription that contains the subscription item that you want to modify.
3. On the **Subscription Items** subtab, click **Edit** next to the item that you want to modify.
4. On the subscription item record, click **Change Order**.
5. Click **Modify Quantity for Fixed Usage**.
6. In the **New Quantity** field, enter a new fixed usage quantity. Value for quantity can be any positive value or zero.
7. In the **Execution Date** field, enter an effective date for the new quantity. You can enter the current date or any future date.

   Note: If the Backdated Change Order feature is enabled, you can backdate up to one day after the last subscription billing date (or up to the subscription item start date if the item is not yet billed). Certain conditions apply when entering backdated change orders. For more information, see Backdated Subscription Change Orders.

8. Click **Save**.

When the change order is executed, the system creates a new item with the updated quantity and its first charge record. The rest of the charge records for the new item will be created by the SWV_SB_SS_CCScheduler script.

If the fixed usage quantity is updated in the middle of a billing cycle, the first charge for the new item is aligned to the current period and prorated based on the implementation date of the fixed usage quantity update.

Note: You can update the quantity of fixed usage items when you add it on a sales transaction. For more information, see Configuring Subscription Item Rate.

Updating the fixed usage quantity is also supported on Add Subscription Item and Migrate Subscription Plan change orders. For more information, see Adding a Subscription Item and Migrating Customers and Items to a New Subscription Plan.

Modifying the Start Date of a Subscription

You can change the start date of a subscription that is still in Pending status. The subscription start date is set on the sales order from which the subscription is created. You can change the start date of a subscription through the Change Order button on the subscription record or on the primary subscription item record.

Important: To avoid exceeding the workflow execution usage limit, the recommended maximum number of primary subscription items that can be processed at the same time for Modify Subscription Start Date change order is 50. This limit is established by testing 50 primary subscription items, each with one secondary item and without any other change orders during subscription creation. If your primary items have more than one secondary item or if you have subscription items created in suspended state or custom pricing adjustments during subscription creation, you should decrease the number of items to be processed concurrently for Modify Subscription Start Date to around 10 to 20 primary subscription items. Exceeding these recommended limits may cause incomplete change orders stuck in In Progress state.

To modify the start date of a subscription:

1. Edit the subscription or primary subscription item record:
   - To edit the subscription record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, edit the subscription that contains the subscription item that you want to modify.

- To edit the primary subscription item record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, view the subscription that contains the primary subscription item. On the subscription record, edit the primary subscription item that you want to modify.

2. Click the **Change Order** button.
3. Click **Modify Subscription Start Date**.
4. In the **Start Date** field, select a new start date for the item. You can specify the current date or any future date as the new start date.

   > **Note:** If the Backdated Change Order feature is enabled, you can backdate up to the transaction creation date. Certain conditions apply when entering backdated change orders. For more information, see Backdated Subscription Change Orders.

   > **Note:** For subscription items with a custom term (that is, a custom end date has been specified on the sales order or through the Extend Subscription Item End Date change order), the resulting term based on the new start date and custom end date must be at least one month but not more than 120 months.

5. For anniversary subscriptions, check the **Retain Anniversary Start Date** box if you want the subscription billing date and billing cycle dates to follow the original start date.
6. In the **Note** field, enter text describing the reason behind the change in the start date.
7. Click **Save**.

The start date of the subscription and all secondary items will be realigned to the new primary item start date. If the alignment option of the subscription item is set to **align with next billing cycle start with no proration**, it will automatically be changed to **align with current billing close and prorate**.

Reactivating a Suspended Subscription Item

You can reactivate a primary subscription item after it has been suspended. You can only reactivate primary items with a Suspended status.

You can reactivate a suspended subscription item from the subscription record or from the primary subscription item record.

> **Note:** Suspending and reactivating a lead item only affects recurring service, fixed usage, and variable usage item charges. Suspension and reactivation do not affect termination fee items.

To reactivate a suspended subscription item:

1. Edit the subscription or primary subscription item record:
   - To edit the subscription record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, edit the subscription that contains the subscription item that you want to reactivate.
   - To edit the primary subscription item record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, view the subscription that contains the suspended primary subscription item. On the subscription record, edit the primary subscription item that you want to reactivate.
2. Click the **Change Order** button.
3. Click **Reactivate Subscription Item**.
4. Select an option in the **Bill Option** field:

- **Bill for the Suspended Period** – Select this option if you want to bill the customer for the item during the suspended period. The **Prorate All** box is not checked, indicating that proration is not applicable because the charges are continued during the suspension period.
- **Bill from the Reactivation Date** – Select this option if you want to bill the customer for the item starting from the reactivation date. The **Prorate All** box is checked, indicating that charges for the item on the billing cycle when it is suspended will be prorated. Proration only applies to recurring service and fixed usage items.

  > **Note:** If you bill from the reactivation date, if the creation of credit memo is enabled, and if the lead item is billed in advance, a credit memo is applied to the invoice when the item is reactivated. For more information, see Applying Credit Memos.

  > **Note:** When a normal suspension is done, the subscription item incurs a 1 day charge upon reactivation if it is billed from the reactivation date. However, for a subscription item created in suspended state, it incurs a zero charge upon reactivation if billed from the reactivation date. For information on how to create suspended subscription items, see Creating Subscription Items in Suspended State.

  > **Note:** When a normal suspension is done and a future-dated Reactivate Subscription Item change order is applied, a pending deficit analytic will be created only if the Bill Option selected is Bill from Reactivation Date.

5. In the **Effective From** field, select when the reactivation becomes effective.
   - **End of Billing Period** – Select this option if you want the reactivation date to be the end of a billing cycle. The **Reactivation Date** field automatically defaults to the end date of the current cycle.
   - **Specific Date** – Select this option if you want to define a specific reactivation date. Select a reactivation date in the **Reactivation Date** field. Reactivation effective date can be the current date or any future date.

   > **Note:** If the Backdated Change Order feature is enabled, you can backdate up to the last subscription billing date (or subscription item start date if the item is not yet billed). Certain conditions apply when entering backdated change orders. For more information, see Backdated Subscription Change Orders.

6. In the **Execution Date** field, select a date when the Reactivate Subscription Item change order will be processed. The execution date must be earlier than or equal to the reactivation date that you specified, but not earlier than the last subscription billing date (or subscription item start date if the item is not yet billed). If you leave the **Execution Date** field blank, the execution date of the Reactivate Subscription Item change order is set to the same date as the reactivation date.
7. Check the **Extend Term** box if you want to extend the term to cover the number of days that the subscription item was suspended. The new end date is the current subscription item end date plus the number of suspended days.

   This option is available only if you selected the bill option **Bill from the Reactivation Date** and only applicable to non-perpetual items. For more information, see Extending Subscription Term Upon Reactivation.

   > **Note:** Upon reactivation, only the item end date is updated. Creation of charges for the extension period will depend on the notice period for the item and on the succeeding run of the SWV_SB_SS_CCScheduler script.

8. Enter additional notes regarding the reactivation in the **Notes** field.

9. Click **Save**.

You can still cancel the suspension of a subscription item if the Reactivate Subscription Item change order has not yet reached its execution date.

Reactivate Subscription Item change orders are processed when the execution date is equal to the current date. When the status of the Reactivate Subscription Item change order is Completed, the status of the primary subscription item changes to Open.

> **Note:** The lead subscription item status can also change to Pending Renewal depending on the subscription plan settings. For information about renewal options, see Setting Up Renewal Options of a Subscription Plan.

Upon reactivation of a suspended subscription item, the charge stage of the charges for the suspended period will change from On Hold to Ready.

> **Note:** For subscriptions with variable usage items that came from suspension/reactivation, you need to run the scheduler script for usage-based rating (SWV_SB_SS_REScheduler) to update the charge stage status. For information about running Recurring Billing scripts, see Script Runner.

For information on how to suspend a lead item, see Suspending a Subscription Item.

Extending Subscription Term Upon Reactivation

The Extend Term option enables you to extend the term upon reactivation of a suspended subscription item. You can extend the subscription item's current end date to cover the number of days that it has been suspended, allowing you to complete the full duration of the subscription item's original term.

Extend term is applicable only to non-perpetual items. This option is available only if you selected **Bill from the Reactivation Date** on the Reactivate Subscription Item change order form. For information about reactivating suspended subscription items, see Reactivating a Suspended Subscription Item.

When you check the **Extend Term** box, the value of the **New End Date** field is automatically calculated. The new end date is equal to the current end date plus the number of suspended days. The number of suspended days depends on the start type of the subscription item:

- If start type is Immediate (normal suspension), the number of suspended days is the number of days in between the suspension date and the reactivation date (that is, starting on the day after the suspension date until the day before the reactivation date).
- If start type is Suspended (suspension upon creation), the number of suspended days includes the suspension date until the day before the reactivation date. However, after you reactivate a subscription item that is created in suspended state, it's start type will change to Immediate. On the next suspension/reactivation of the item, it will now follow the normal count for suspended days (as in normal suspension).

> **Note:** For information on the effect of extend term for secondary subscription items with offset and duration, see Extend Term for Items with Offset and Duration.

You can extend the term upon reactivation only if the number of suspended days is at least one day. This means that for a normal suspension, the reactivation date should be at least two days after the suspension date. For an item created in suspended state, the reactivation date should be at least one day after the suspension date.

The following table shows an example of the difference in number of suspended days depending on the item start type. Note that extend term is not allowed if the number of suspended days is less than one day.

Start Type	Suspension Date	Reactivation Date			
		If January 1, 2014	If January 2, 2014	If January 3, 2014	If January 4, 2014
Immediate	Suspended on January 1, 2014	Suspended days < 1	Suspended days < 1	Suspended days = 1 (January 2)	Suspended days = 2 (January 2 and 3)
Suspended	Created and suspended on January 1, 2014	Suspended days < 1	Suspended days = 1 (January 1)	Suspended days = 2 (January 1 and 2)	Suspended days = 3 (January 2, 3, and 4)

Taking one of the examples from the preceding table, an item is created on January 1, 2014 with a start type of Suspended. If it is reactivated on January 3, 2014, the number of suspended days is two days, January 1 (suspension date) and January 2. If it were a normal suspension (start type is Immediate), the number of suspended days would have been one day (January 2 only).

Example for Extend Term:

A subscription item has a term of 6 months, with start date January 1, 2014 and end date June 30, 2014, and its start type is set to Immediate. The following table shows an example of how the extend term option is applied.

Current End Date	Suspension Date	Reactivation Date	Number of Suspended Days (Days in between Suspension Date and Reactivation Date)	Extend Term?	New End Date (Current End Date plus Number of Suspended Days)
June 30, 2014	March 1, 2014	March 5, 2014	3 days	No	June 30, 2014 (current end date, not extended)
June 30, 2014	April 1, 2014	April 12, 2014	10 days	Yes	July 10, 2014 (new end date)
July 10, 2014	May 1, 2014	May 7, 2014	5 days	Yes	July 15, 2014 (new end date)

- **Suspend/Reactivate 1 (March)** – The item is suspended on March 1, 2014 and reactivated on March 5, 2014. The number of suspended days is three—the item is suspended on March 2, 3, and 4 only. When the item is reactivated, the extend term option is not selected. The current end date of the item is retained (June 30, 2014).
- **Suspend/Reactivate 2 (April)** – The item is suspended again on April 1, 2014 and reactivated on April 12, 2014. This time, the number of suspended days is 10 (from April 2 through 11). When the item is reactivated, the extend term option is selected. The new end date for the item is July 10, 2014 (10 days after the current end date, June 30, 2014).

  Note that even though the item was suspended for three days in March, those three days were not included in the computation for the new end date during the suspension/reactivation in April. Only the number of suspended days from the most recent suspension is added to the current end date when the extend term option is selected upon reactivation.
- **Suspend/Reactivate 3 (May)** – The item is suspended again on May 1, 2014 and reactivated on May 7, 2014. When extend term is selected upon reactivation, the number of suspended days (five days) is added to the current end date, July 10, 2014. The new end date is July 15, 2014.

Extend Term for Items with Offset and Duration

Suspension and reactivation are applied on primary subscription items. Some primary items contain secondary subscription items with offset and duration values. When offset and duration values are specified for a secondary subscription item, it can have start and end dates that are different from the primary subscription item’s start and end dates.

The following examples show how extend term upon reactivation of a primary item affects the start and end dates of associated secondary subscription items with offset and duration values.

Note that when a suspension occurs, time essentially stops for the subscription. If the suspension happened before the secondary item start date and if the term is extended upon reactivation, the number of days that the subscription is stopped or suspended is accounted for in the adjusted secondary item start and end dates.

For these examples, term is 12 months and rating frequency is monthly. Start date is January 1, 2014 and end date is December 31, 2014. Start type is set to Immediate unless otherwise specified.

> **Note:** For items with start type set to Immediate, the number of suspended days is the number of days in between suspension date and reactivation date (that is, starting on the day after the suspension date until the day before the reactivation date).
>
> For items with start type set to Suspended, the number of suspended days includes the suspension date until the day before the reactivation date.

- Cases with Offset for Secondary Subscription Items
- Cases with Duration for Secondary Subscription Items
- Cases with Offset and Duration for Secondary Subscription Items
- Cases with Offset and Duration for Secondary Subscription Items (Suspended Start Type)

Cases with Offset for Secondary Subscription Items

Offset determines the number of rating periods after the primary item start date when the secondary subscription item starts. This means that a secondary subscription item with offset greater than zero can have a start date that is different from the primary subscription item's start date.

Example 1. Secondary Item with Offset: Suspended period is before secondary item's start date

Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	January 31, 2014	March 1, 2014	28	—	January 28, 2015
Secondary Offset = 3	April 1, 2014	December 31, 2014			28	April 29, 2014	January 28, 2015

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

For secondary item: **New Start Date** = Original Start Date + Number of Suspended Days

Example 2. Secondary Item with Offset: Suspension is before secondary item's start date, Reactivation is between secondary item's start and end dates

Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	January 31, 2014	March 1, 2014	28	—	January 28, 2015
Secondary Offset = 1	February 1, 2014	December 31, 2014			28	March 1, 2014	January 28, 2015

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

For secondary item: **New Start Date** = Reactivation Date + Number of Days between Primary Item Suspension Date and Secondary Item Original Start Date

In this example, number of days between primary item suspension date (January 31) and secondary item original start date (February 1) is zero. The new start date for the secondary item is equal to the primary item reactivation date, March 1, 2014.

Example 3. Secondary Item with Offset: Suspension period is between secondary item's start and end dates

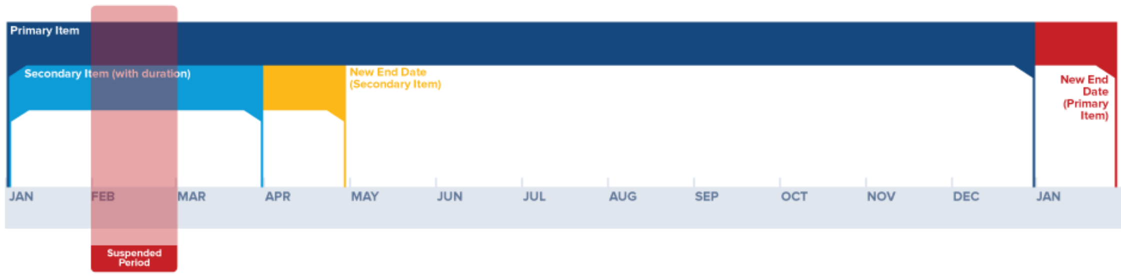
Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	April 1, 2014	April 12, 2014	10	—	January 10, 2015
Secondary Offset = 3	April 1, 2014	December 31, 2014			10	—	January 10, 2015

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

Cases with Duration for Secondary Subscription Items

Duration determines the number of rating periods that the secondary subscription item is active. This means that a secondary subscription item with duration can have an end date that is different from the primary subscription item's end date.

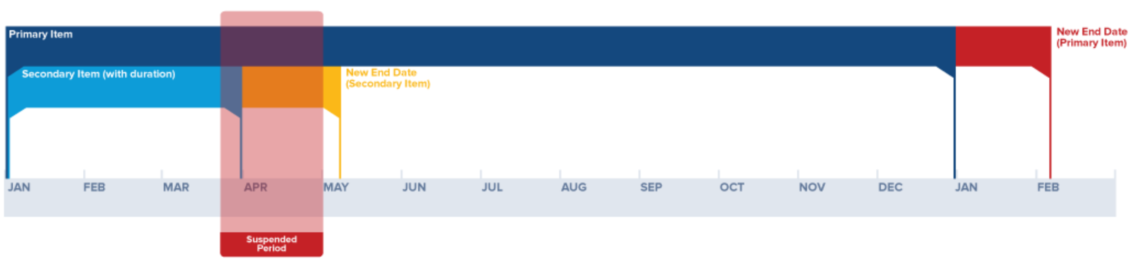
Example 4. Secondary Item with Duration: Suspended period is between secondary item's start and end dates



Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	January 31, 2014	March 1, 2014	28	—	January 28, 2015
Secondary Duration = 3	January 1, 2014	March 31, 2014			28	—	April 28, 2014

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

Example 5. Secondary Item with Duration: Suspension is between secondary item's start and end dates, Reactivation is after secondary item's end date



Subscription Item	Start Dat e	End Date	Suspension Dat e	Reactivation Dat e	Number of Sus pended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	March 26, 2014	May 1, 2014	35	—	February 4, 2015
Secondary Duration = 3	January 1, 2014	March 31, 2014			5	—	May 6, 2014

For primary item: **New End Date** = Original End Date + Number of Suspended Days

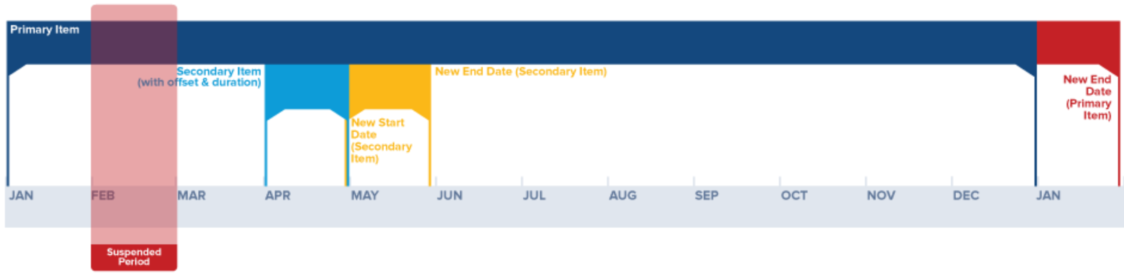
For secondary item: **New End Date** = Reactivation Date + Number of Suspended Days For Secondary Item

In this example, the secondary item is suspended only for five days, from March 27 through 31 only. The new end date for the secondary item is equal to primary item reactivation date (May 1) plus five days, May 6, 2014.

Cases with Offset and Duration for Secondary Subscription Items

A secondary subscription item with both offset and duration values can have start and end dates that are different from the primary subscription item's start and end dates.

Example 6. Secondary Item with Offset and Duration: Suspended period is before secondary item's start date

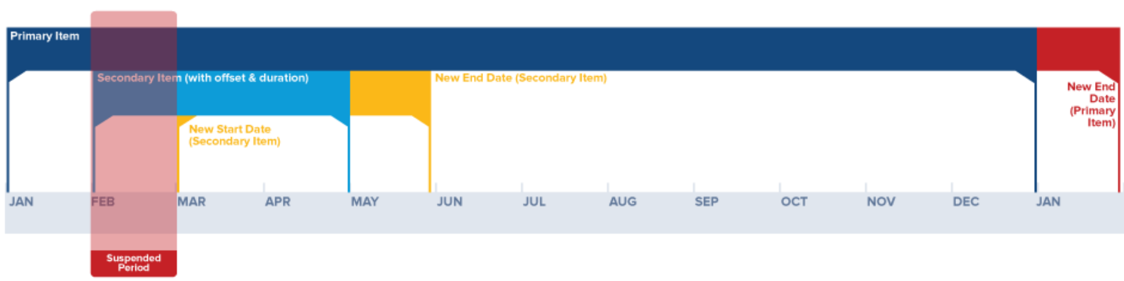


Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	January 31, 2014	March 1, 2014	28	—	January 28, 2015
Secondary Offset = 3 Duration = 1	April 1, 2014	April 30, 2014			28	April 29, 2014	May 28, 2014

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

For secondary item: **New Start Date** = Original Start Date + Number of Suspended Days

Example 7. Secondary Item with Offset and Duration: Suspension is before secondary item's start date, Reactivation is between secondary item's start and end dates



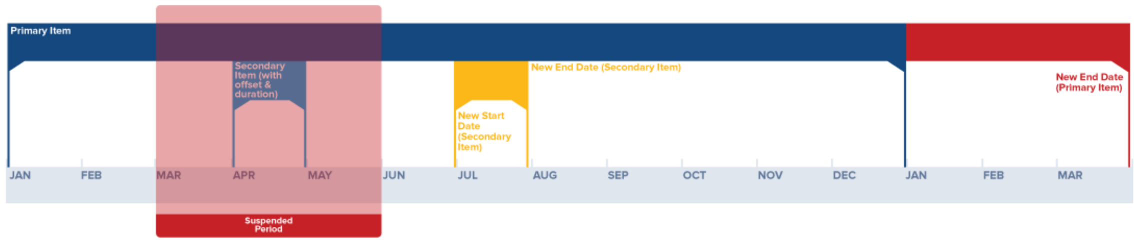
Subscription Item	Start Date	End Date	Suspension Date	Reactivation Dat e	Number of Sus pended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	January 31, 201 4	March 1, 2014	28	—	January 28, 2015
Secondary Offset = 1 Duration = 3	February 1, 2014	April 30, 201 4			28	March 1, 2014	May 28, 2014

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

For secondary item: **New Start Date** = Reactivation Date + Number of Days between Primary Item Suspension Date and Secondary Item Original Start Date

In this example, number of days between primary item suspension date (January 31) and secondary item original start date (February 1) is zero. The new start date for the secondary item is equal to the primary item reactivation date, March 1, 2014.

Example 8. Secondary Item with Offset and Duration: Suspension is before secondary item’s start date, Reactivation is after secondary item’s end date



Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	March 1, 2014	May 31, 2014	90	—	March 31, 2015
Secondary Offset = 3 Duration = 1	April 1, 2014	April 30, 2014			90	June 30, 2014	July 29, 2014

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

For secondary item: **New Start Date** = Reactivation Date + Number of Days between Primary Item Suspension Date and Secondary Item Original Start Date

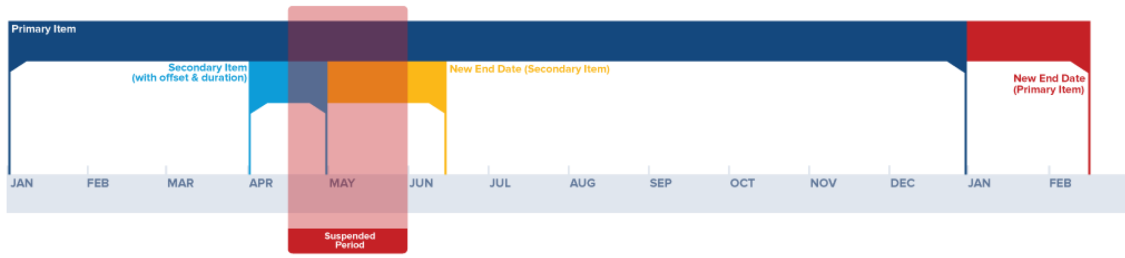
In this example, number of days between primary item suspension date (March 1) and secondary item original start date (April 1) is 30 days. The new start date for the secondary item is equal to primary item reactivation date (May 31) plus 30 days, June 30, 2014.

Example 9. Secondary Item with Offset and Duration: Suspended period is between secondary item’s start and end dates

Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	April 5, 2014	April 15, 2014	9	—	January 9, 2015
Secondary Offset = 3 Duration = 1	April 1, 2014	April 30, 2014			9	—	May 9, 2014

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

Example 10. Secondary Item with Offset and Duration: Suspension is between secondary item’s start and end dates, Reactivation is after secondary item’s end date



Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	April 15, 2014	May 31, 2014	45	—	February 14, 2015
Secondary Offset = 3 Duration = 1	April 1, 2014	April 30, 2014			15	—	June 15, 2014

For primary item: **New End Date** = Original End Date + Number of Suspended Days

For secondary item: **New End Date** = Reactivation Date + Number of Suspended Days For Secondary Item

In this example, number of suspended days for secondary item is 15 days (suspended from April 16 through 30). The new end date for the secondary item is equal to primary item reactivation date (May 31) plus 15 days, June 15, 2014.

Cases with Offset and Duration for Secondary Subscription Items (Suspended Start Type)

For items created in suspended state (start type set to Suspended), the number of suspended days includes the suspension date until the day before the reactivation date.

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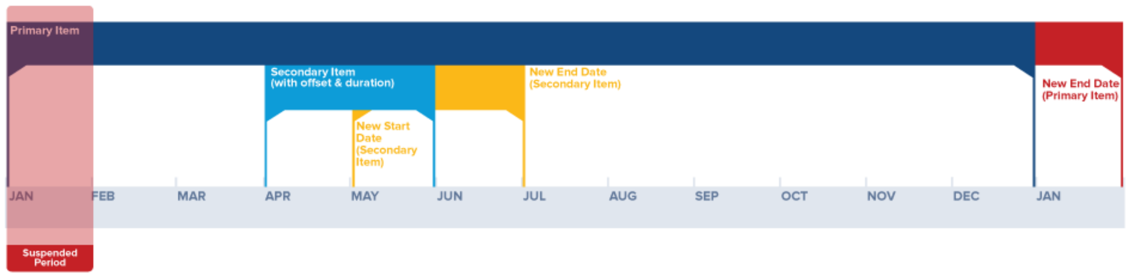
Example 11. Secondary Item with Offset and Duration, Suspended Start Type: Suspended period is before secondary item's start date

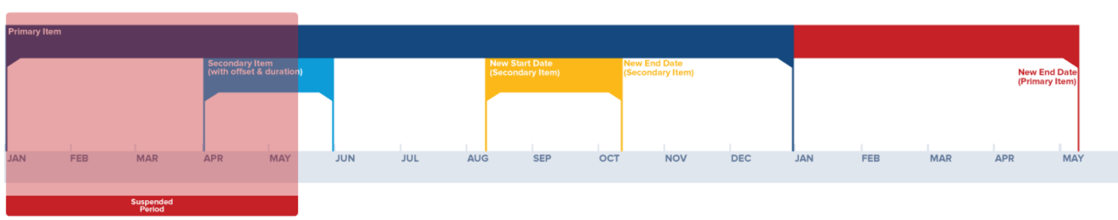


Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	January 1, 2014	February 1, 2014	31	—	January 31, 2015
Secondary Offset = 3 Duration = 2	April 1, 2014	May 31, 2014			31	May 2, 2014	July 1, 2014

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

For secondary item: **New Start Date** = Original Start Date + Number of Suspended Days

Example 12. Secondary Item with Offset and Duration, Suspended Start Type: Reactivation is between secondary item's start and end dates



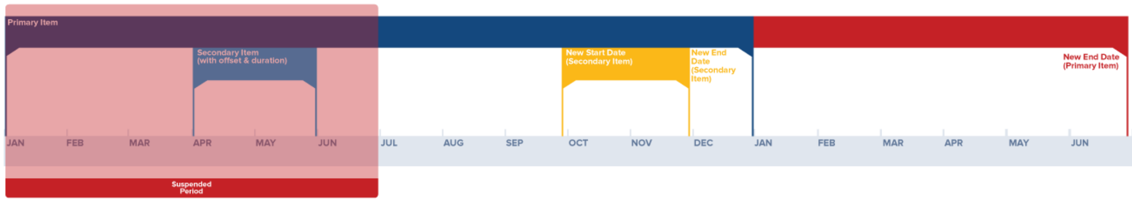
Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	January 1, 2014	May 10, 2014	129	—	May 9, 2015
Secondary Offset = 3 Duration = 2	April 1, 2014	May 31, 2014			129	August 8, 2014	October 7, 2014

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

For secondary item: **New Start Date** = Reactivation Date + Number of Days from (and including) Primary Item Suspension Date to (but not including) Secondary Item Original Start Date

In this example, number of days from primary item suspension date (January 1, included) to secondary item original start date (April 1, not included) is 90 days. The new start date for the secondary item is equal to primary item reactivation date (May 10) plus 90 days, August 8, 2014.

Example 13. Secondary Item with Offset and Duration, Suspended Start Type: Reactivation is after secondary item's end date



Subscription Item	Start Date	End Date	Suspension Date	Reactivation Date	Number of Suspended Days	New Start Date	New End Date
Primary	January 1, 2014	December 31, 2014	January 1, 2014	June 30, 2014	180	—	June 29, 2015
Secondary Offset = 3 Duration = 2	April 1, 2014	May 31, 2014			180	September 28, 2014	November 27, 2014

For primary and secondary items: **New End Date** = Original End Date + Number of Suspended Days

For secondary item: **New Start Date** = Reactivation Date + Number of Days from (and including) Primary Item Suspension Date to (but not including) Secondary Item Original Start Date

In this example, number of days from primary item suspension date (January 1, included) to secondary item original start date (April 1, not included) is 90 days. The new start date for the secondary item is equal to primary item reactivation date (June 30) plus 90 days, September 28, 2014.

Renewing Items in a Subscription

A renewal action extends the end date of a subscription item. The subscription item end date determines when the subscription item will be terminated or renewed depending on its renewal settings.

The end date and renewal settings for a subscription item is set on the subscription plan that is referenced by the item. For more information, see Setting Up Subscription Plans and Setting Up Renewal Options of a Subscription Plan.

A Renew Subscription Item change order will be created for a subscription item depending on the specified renewal action on the subscription plan used. To understand how the renewal actions differ, read the following:

- Automatic Renewal
- Renewal Upon Customer Acceptance
- Creating a Transaction for Subscription Item Renewal

> **Note:** The billing engine clears out the value for the next billing date when the last charge for the subscription item has been billed and a renewal action has not yet been applied. The next billing date will be recomputed upon renewal based on the item end date if the billing method is advance, or item end date plus 1 day if billing method is arrears.

Automatic Renewal

If you selected **Automatically Renew** in the Renewal Action field of the subscription plan, a Renew Subscription Item change order is created and completed 30 days before the item end date. Upon completion of the change order action, the subscription item end date is updated to include the term on renew.

If the **Migrate on Renew** box is checked, the Renew Subscription Item change order is created and canceled 30 days before the item end date. The old subscription item is marked for termination and its termination date is set to the item end date. A new (migrated) subscription item is created with a status of Pending and its start date is set to one day after the old subscription item end date.

Renewal Upon Customer Acceptance

If you selected **Await Customer Acceptance** in the Renewal Action field of the subscription plan, the subscription item enters Pending Renewal state 30 days before its end date. A Renew Subscription Item change order is also created but it remains in In Progress state until the item is renewed.

To renew a subscription item with an Await Customer Acceptance renewal action:

1. Go to Subscription Billing > View Records > Subscription.
2. Click **View** next to the subscription that contains the item that you want to renew.
3. On the **Subscription Items** subtab, click the ID of the item that you want to renew.
4. On the primary subscription item record, click the **Renew Subscription Item** button. This button is available only when the item enters Pending Renewal state 30 days before its end date.

The Renew Subscription Item change order changes from In Progress to Completed, and the subscription item end date is updated to include the term on renew.

If the **Migrate on Renew** box is checked, the Renew Subscription Item change order is canceled. The old subscription item is marked for termination and its termination date is set to the item end date. A new (migrated) subscription item is created with a status of Pending and its start date is set to one day after the old subscription item end date.

If the customer has not acted on the renewal notification, the subscription item will be marked for termination when the specified days after renewal date is reached.

Creating a Transaction for Subscription Item Renewal

If you selected **Create Transaction** in the Renewal Action field of the subscription plan, the subscription item enters Pending Renewal state 30 days before the item end date. However, you can create a renewal transaction by applying a Renew Subscription Item change order anytime if the subscription item status is Open or Pending Renewal.

If the subscription item is not renewed beforehand and the specified days in advance (that is, days before the item's renewal date) is reached, a renewal transaction will automatically be created for the item.

To manually create a renewal transaction for a subscription item:

1. Go to Subscription Billing > View Records > Subscription.
2. Click **View** next to the subscription that contains the item that you want to renew.
3. On the **Subscription Items** subtab, click **Edit** next to the item that you want to renew.
4. Click the **Change Order** button.
5. Click **Renew Subscription Item**.

A confirmation message appears at the top of the subscription item record confirming that a renewal transaction has been created. A Renew Subscription Item change order is also created and completed.

The created renewal transaction can be an opportunity, an estimate, or a sales order, depending on the transaction type specified on the subscription plan. The link to the renewal transaction is found on the Renewal section of the primary subscription item record.

For information on editing opportunities, estimates, and sales orders, read the following help topics:

- Entering a Subscription Opportunity
- Entering a Subscription Estimate
- Entering a Subscription Sales Order
- Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator)

> **Note:** The default form used for the renewal transaction is the standard opportunity, estimate, or sales order form. Some fields on the Recurring Billing configurator are not editable if the transaction is a renewal transaction.

If the renewal transaction is an opportunity or an estimate, it must be converted to a sales order and the sales order must be approved. On approve of the sales order, a pending Migrate Subscription Plan change order is created with an effective date set to the renewal date (that is, one day after the original item end date).

If the specified days after renewal date is reached and the sales order has not been approved, the subscription item will be marked for termination. You can still approve the sales order but it will no longer create a Migrate Subscription Plan change order to process the renewal item.

Important Things to Note for Creating a Renewal Transaction:

- A renewal opportunity or estimate can still be converted to a sales order even if its expected close date has already passed. The resulting sales order can still be approved but it will no longer create a Migrate Subscription Plan change order to process the renewal of the item.
- If a renewal transaction has already been created and a change order is applied to the subscription, the change will no longer affect the created transaction even if the change order is future dated. This may also mean that if the end date of the original item is extended after a renewal transaction has already been created, there may be a period when the original subscription item overlaps with the renewal subscription item.
- If the same plan is used in the renewal transaction, the termination fee in the original item will not be charged and the termination fee in the renewal item will also be dropped.
- If a different plan is used in the renewal transaction, the termination fee from the original plan will not be charged and the termination fee from the new plan will be included in the renewal item with full duration. Changing the subscription plan can be through the Migrate on Renew option (renewal setting on the subscription plan) or by changing the subscription plan on the renewal transaction.
- Regardless if the Migrate on Renew option is checked or not, if the original subscription plan is different from the subscription plan used in the renewal, the change reason on the subscription analytics record for the old item is Migrated. If the same subscription plan is used, the change reason for the old item is Renewed. For the new item, the change reason is always Activated.
- If an uplift is applied to one of the subscription items and the same plan is used in the renewal transaction, the uplift will not be carried over to the renewal item even if it has no end date. Only changes to the quantity, rate, and discount will be carried over.
- On a renewal transaction, if the renewal item is copied (using the **Copy Previous** button), the copied item will also be marked as a renewal item but it will be treated as a duplicate and will be disregarded on approve of the renewal transaction.
- If a renewal transaction is copied (using the **Make Copy** action), the copied transaction will have the same renewal item as the original transaction. If a Migrate Subscription Plan change order is not yet created for the item (that is, a renewal transaction is not yet approved), approving the original transaction or the copied transaction will create a Migrate Subscription Plan change order. When a Migrate Subscription Plan change order has been created for the item, approving copies of the renewal transaction will no longer create another change order, unless you cancel the existing (pending) change order.

Suspending a Subscription Item

A subscription item can be suspended for various business reasons. For example, a user can suspend a subscription that has a pending payment dispute. You can only suspend lead items with an Open or Pending Renewal status. You cannot suspend secondary items in a subscription.

> **Note:** Suspending a lead item only affects recurring service, fixed usage, and variable usage item charges. Suspension does not affect termination fee items.

You can suspend a primary subscription item from the subscription record or from the subscription item record.

To suspend a subscription item:

1. Edit the subscription or primary subscription item record:
   - To edit the subscription record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, edit the subscription that contains the subscription item that you want to suspend.
   - To edit the primary subscription item record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, view the subscription that contains the primary subscription item. On the subscription record, edit the primary subscription item that you want to suspend.
2. Click the **Change Order** button.
3. Click **Suspend Subscription Item**.
4. Select an option in the **Effective From** field:
   - **End of Billing Period** – Select this option if you want to start the effectivity of the suspension at the end of a billing cycle. The **Suspension Date** field automatically defaults to the end date of the current cycle.
   - **Specific Date** – Select this option if you want to define a specific suspension date. Select a suspension date in the **Suspension Date** field. Suspension effective date can be the current date or any future date.

   > **Note:** If the Backdated Change Order feature is enabled, you can backdate up to the last subscription billing date (or subscription item start date if the item is not yet billed). Certain conditions apply when entering backdated change orders. For more information, see Backdated Subscription Change Orders.
5. In the **Execution Date** field, select a date when the Suspend Subscription Item change order will be processed. The execution date must be earlier than or equal to the suspension date that you specified, but not earlier than the last subscription billing date (or subscription item start date if the item is not yet billed). If you leave the **Execution Date** field blank, the execution date of the Suspend Subscription Item change order is set to the same date as the suspension date.
6. In the **Reason** field, select a description that best describes the purpose of the suspension.
7. Enter additional notes regarding the suspension in the **Notes** field.
8. Click **Save**.

You can still cancel the suspension of a subscription item if the Suspend Subscription Item change order has not yet reached its execution date.

Suspend Subscription Item change orders are processed when the execution date is equal to the current date. When the status of the Suspend Subscription Item change order is Completed, the status of the primary subscription item changes to Suspended.

When you suspend a subscription item, the charge stage of charges for the suspended period will be set to Hold and it will not be picked up by the billing engine. Upon reactivation, the charge stage will be set to Ready.

> **Note:** For subscriptions with variable usage items that came from suspension/reactivation, you need to run the scheduler script for usage-based rating (SWV_SB_SS_REScheduler) to update the charge stage status. For information about running Recurring Billing scripts, see Script Runner.

Suspended subscription items are excluded from the renewal process until it gets reactivated.

If all the lead items in a subscription have been suspended and there are no other items eligible for billing, the subscription status will change to Suspended. If one of the suspended items in a suspended subscription has been reactivated or is pending renewal, the subscription status will change to Open. For information on how to reactivate a suspended lead item, see Reactivating a Suspended Subscription Item.

Terminating an Item in a Subscription

A custom role with a permission to edit a subscription or subscription item record can terminate primary items and remove it from a subscription. You can terminate an item from the subscription record or from the primary subscription item record.

To terminate a subscription item:

1. Edit the subscription or primary subscription item record:
   - To edit the subscription record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, edit the subscription that contains the subscription item that you want to terminate.
   - To edit the primary subscription item record, go to Subscription Billing > View Records > Subscription. On the Subscription List page, view the subscription that contains the primary subscription item. On the subscription record, edit the primary subscription item that you want to terminate.
2. Click the **Change Order** button.
3. Click **Terminate Subscription Item**.
4. In the **Effective From** field, select when the termination will be effective.
   - **End of Billing Period** – Select this option if you want to specify a termination date that coincides with one of the item's future billing period end dates. This option eliminates the need to prorate the charges for the last billing period since the full billing period days are used up prior to termination.
   - **Specific Date** – Select this option if you want to enter a specific termination date for the item. If the proration options are set for the subscription item or if the **Prorate** option is checked on this change order, the charges for the last billing period will be prorated if the number of days used up prior to termination is less than the full billing period days.

   > **Note:** If the termination method of the subscription item is End of Billing Period, the **Effective From** field is automatically set to **End of Billing Period**.
5. In the **Termination Date** field, select a date when the subscription item will be terminated.
   - If you selected **End of Billing Period** in the **Effective From** field, possible termination dates are valid billing period end dates with available charges. Click the calendar icon to select a

termination date from the list of future billing period end dates. If you manually enter a date that is not a billing period end date:

- If the subscription item's termination method is End of Billing Period, the system will automatically set the value of the **Termination Date** field to the nearest valid billing period end date.
- If the subscription item's termination method is Upon Cancellation, the value in the **Effective From** field will automatically change to **Specific Date**.

- If you selected **Specific Date** in the **Effective From** field, you can enter the current date or any future date (with available charges).

> **Note:** If the Backdated Change Order feature is enabled, you can backdate up to the last subscription billing date (or subscription item start date if the item is not yet billed). Certain conditions apply when entering backdated change orders. For more information, see Backdated Subscription Change Orders.

6. In the **Execution Date** field, select a date when the Terminate Subscription Item change order will be processed. The execution date must be earlier than or equal to the termination date that you specified, but not earlier than the transaction date of the sales order associated with the subscription. If you leave the **Execution Date** field blank, the execution date of the Terminate Subscription Item change order is set to the same date as the termination date.
7. Check the **Prorate** box if you want to apply proration on the charges for the last billing period for the item. This option is applicable only if you selected a termination date that does not coincide with one of the item's billing period end date.

   Clear the **Prorate** box if you want to retain the proration options set for the subscription item. For more information about setting proration options for subscription items, see Setting Up Charge Plans and Setting Up Subscription Plan Items.
8. In the **Reason** field, select an item that best describe the reason behind the termination.
9. In the **Note** field, enter additional text regarding the termination.
10. Click **Save**. A confirmation message appears on top of the subscription record to indicate that the process is successful.

You can still cancel the termination of a subscription item if the Terminate Subscription Item change order has not yet reached its execution date.

Terminate Subscription Item change orders are processed when the execution date is equal to the current date. When the Terminate Subscription Item change order status is Succeeded, the status of the subscription item changes to Pending Termination, while the status of the subscription remains Open.

> **Note:** For subscription items with a Pending Termination status, applicable subscription actions will be limited to adding a one-time charge. When you add a one-time charge to an item that is pending termination, you should set the one-time charge's billing effective date to the same date as the termination date to avoid billing issues. For information about one-time charges, see Adding One-Time Subscription Charges.

> **Note:** Charges with a charge stage set to Hold will change to Ready when the termination change order is executed.

When the Terminate Subscription Item change order status changes to Completed on the specified termination date, the status of the subscription item changes to Terminated after a bill run operation. When all subscription items in the subscription are terminated, the subscription status changes to Closed.

> **Note:** The SCO Subscription Items to Terminate workflow executes every 30 minutes to close subscriptions that have a blank Next Billing Date field, and contains only primary subscription items with a status of Pending Termination and a Termination Date that is equal to the current date. This workflow action sets the status of the primary subscription item from Pending Termination to Terminated, and the status of the subscription from Open to Closed.

For more information on subscription lifecycle states, see Subscription Workflow.

For information on Recurring Billing custom roles and permissions, see Roles and Permissions for Recurring Billing.

Importing Recurring Billing Data

You can transfer recurring billing data in CSV format from other applications into NetSuite using the Import Assistant. If you are using a role with import CSV file permission, you can access the Import Assistant at Setup > Import/Export > Import Tasks > Import CSV Records.

Before you attempt to import data with the Import Assistant, you need to set up CSV files and review their formatting carefully to avoid errors that prevent import and to ensure that data is imported with correct values. For help preparing files for CSV import, see the help topic Guidelines for CSV Import Files.

> **Note:** When mapping a column in an imported CSV file to a NetSuite field, the default reference type for records is name. However, if you specify the name of a record and there are multiple records with the same name, you will not be able to know which record is updated during CSV import. You should use internal ID as the reference type for records. You can set this during CSV import, when you reach Step 4 (Field Mapping). For more information, see the help topic Select Reference Types.

Make sure that the Run Server SuiteScript and Trigger Workflows preference are enabled in the CSV Import Preferences. For more information, see the help topic Setting CSV Import Preferences.

The tables in the following sections describe the types of recurring billing data that can be imported into NetSuite. The tables define the fields and if they are required for each type of recurring billing data.

- Rate Plan Data
- Usage Tier Data
- Billing Plan Data
- Charge Plan Data
- Subscription Plan Data
- Subscription Plan Item Data
- Subscription Sales Order Data
- Usage Data

> **Note:** Aside from CSV imports, you can also create a Web Services application using the SuiteTalk platform that would send usage events to the Recurring Billing SuiteApp. For more information on creating web services using SuiteTalk, see the help topic SuiteTalk Platform Overview. Contact your NetSuite Professional Services Consultant for help with developing and customizing SuiteTalk Web Service Applications.

Rate Plan and Usage Tier Data

Rate Plan Data

> **Note:** Updating rate plan records using CSV import is currently not supported.

CSV Import Settings:

- Import Type: Custom Records
- Record Type: Rate Plan

Field	Required	Description
Name	Yes	Name of the rate plan.
Status	No	Status of the rate plan. **Note:** For CSV imports, you can only set the value of this field to Prepare or Pending Approval because the usage tiers will be imported separately.
Effectivity Date	Yes	Date when the rate plan becomes available for use in the billing system.
End Date	No	Date after which the rate plan can no longer be used by a subscription item.
Rating Model	Yes	Type of rating model that will be used by the rate plan. - **Flat Rate Pricing** – Charge is not divided into tiers with different rates or prices. - **Tiered Pricing** – Charge is divided into tiers and applies different rates or prices to each tier. The charges for all applicable tiers are summed to get the total charge amount. - **Volume Pricing** – Charge is computed based on the rate or price for the tier where the rated quantity falls.
Currency	Yes (for accounts with multiple currencies)	In accounts with enabled Multiple Currencies feature, select the currency that will be used in computing the price of the item to which the rate plan will be applied.
Usage	No	Indicates if the rate plan will be used for usage-based items.
Unit of Measure	No	In accounts with enabled Multiple Units of Measure feature, you can specify a unit of measure that you want to associate with the rate plan.
Service Filter	No	Specifies how the rate plan is used for a single subscription or a collection of customer subscriptions. - This Subscription Only - Include all Customer Subscriptions - Include Sibling Customer Subscriptions - Include Child Customer Subscriptions

Field	Required	Description
Usage Unit Filter	Yes (if the usage field is enabled)	Usage unit that will be used by the rate plan.
Included Usage	No	Number of usage units that will not be charged.
Rating Filter	No	A saved search that will be used by the rate plan to filter usage data to be aggregated and rated. Rating filters are saved searches based on user-defined rules.
Display Filter	No	A saved search that will be used by the rate plan for displaying usage-based line items in the subscription invoice and charge record. **Note:** Leave this field blank if you are using this rate plan for fixed usage items.
Show Tier Breakdown	No	Indicates if you want to display the tiers described for the rate plan and the quantity of units assessed within each tier in the Rating Details field of the invoice lines and charge records.
Historical data sets rate	No	Indicates if you want to calculate the rate based on current usage within the current period with the additional of historical usage. **Note:** This option is available only for volume and tiered pricing models. Leave this field blank if you are using this rate plan for fixed usage items. If the Service Filter field is not set to blank or This Subscription Only, the Historical Data Sets Rate field must be set to false (or blank) and the following fields under the Historical Data Rate subtab must be set to blank.
Minimum Charge	No	Minimum amount that can be charged using the rate plan.
Maximum Charge	No	Maximum amount that can be charged using the rate plan.
Historical Modes	No	Specifies the scope of historical usage data that will be used by the rate plan in determining the volume price or rate. ■ Use all usage ■ Use periods ■ Use custom date
Periods	No	Specifies the period that will be checked by the billing system if the historical mode is set to **Use periods**. ■ First ■ Last ■ Annual
Number of Periods	No	Specifies the number of periods from which the billing system will retrieve historical usage based on relative time frame in reference to the current billing cycle as part of the calculation for determining the volume price or rate.

Field	Required	Description
		Note: This field is enabled only if you selected **Use periods** in the **Periods** field.
Type of Periods	No	Specifies the type of periods from which the billing system will retrieve historical usage based on the relative time frame in reference to the current billing cycle as part of the calculation for determining the volume price or rate. **Note:** This field is enabled only if you selected **Use periods** in the **Periods** field.
Historical Date From	No	Start of the date range if you set the historical mode to **Use custom date**.
Historical Date To	No	End of the date range if you set the historical mode to **Use custom date**.
Annual Option	No	Indicates if you want the billing system to retrieve the annual historical data starting on the date when the subscription started or starting from January of the current year.

Usage Tier Data

CSV Import Settings:

- Import Type: Custom Records
- Record Type: Usage Tier

Field	Required	Description
Rate Plan	Yes	Specifies the rate plan that uses the usage tier.
Usage Tier Name	Yes (if the rate plan rating model is set to either Volume or Tiered Pricing)	Name of the usage tier.
Start Value	Yes (if the rate plan rating model is set to either Volume or Tiered Pricing)	Start value of the usage tier.
Rate	Yes	Rate that will be applied to the usage tier.
Pricing Option	Yes	Pricing option for the tier: - **Rate** – Value in the Rate field is used as a rate. Charge amount for the tier is computed by multiplying the rate and usage quantity for the tier. - **Price** – Value in the Rate field is used as price or the actual charge for the tier. For rate plans with a Flat Rate Pricing rating model, the pricing option must be set to Rate.
Min Price	No	Minimum price for the tier. This field is applicable only if pricing option is Rate.
Max Price	No	Maximum price for the tier. This field is applicable only if pricing option is Rate.

Billing Plan and Charge Plan Data

Billing Plan Data

CSV Import Settings:

- Import Type: Custom Records
- Record Type: Billing Plan

Field	Required	Description
Name	Yes	Name of the billing plan.
Billing Mode	No	Specifies how the billing system determines the dates when a subscription is due to be invoiced. - Anniversary - Fixed Date
Term	Yes	Number of months that the subscription item will be effective. A renewal action occurs 30 days before the subscription item's end date. - Perpetual - 3 months - 6 months - 12 months - 18 months - 24 months - 36 months - 48 months - 60 months - 72 months - 84 months - 96 months - 108 months - 120 months
Minimum Term	Yes (if the term is more than 36 months)	Minimum number of charges that will be created in advance for the subscription plan. - 3 months - 6 months - 12 months - 18 months - 24 months - 36 months **Note:** This field is required if the term more than 36 months.
Notice Period	No	Period wherein new charges are created for the item in the subscription plan. The number specified represents the number of future charges (relative to the current charge period) that must always be available for the item. You can enter any positive integer from 1 to 120.

<table>
<tr><th>Field</th><th>Required</th><th>Description</th></tr>
<tr><td></td><td></td><td>Note: This field is applicable only if the term is more than 36 months.</td></tr>
<tr><td>Termination Method</td><td>Yes</td><td>Period when the termination of the subscription item becomes effective.
- End of billing period
- Upon cancellation</td></tr>
<tr><td>Renewal Action</td><td>No</td><td>Renewal action that will be used when the subscription item enters pending renewal state.
- Automatically Renew
- Await customer acceptance
- Create Transaction
Note: This field is not applicable if the term is perpetual.</td></tr>
<tr><td>Term on Renew</td><td>No</td><td>Number of months the renewed subscription item will be extended.
- Perpetual
- 3 months
- 6 months
- 12 months
- 18 months
- 24 months
- 36 months
- 48 months
- 60 months
- 72 months
- 84 months
- 96 months
- 108 months
- 120 months</td></tr>
<tr><td>Minimum Term on Renew</td><td>No</td><td>Minimum number of charges that will be created in advance for the renewed subscription item.
- 3 months
- 6 months
- 12 months
- 18 months
- 24 months
- 36 months
Note: This field is required if the term on renew is more than 36 months.</td></tr>
<tr><td>Notice Period on Renew</td><td>No</td><td>Period wherein new charges are created for the item in the subscription plan. The number specified represents the number of future charges (relative to the current charge period) that must always be available for the item.
You can enter any positive integer from 1 to 120.</td></tr>
</table>

Field	Required	Description
		Note: This field is applicable only if the term on renew is more than 36 months.
Transaction Type	No	Type of transaction that will be created when the subscription item is renewed. This field is applicable only if Create Transaction is specified in the Renewal Action field. **Note:** The Recurring Billing SuiteApp currently only supports the creation of sales opportunity records for subscription item renewals.
Days in Advance	No	Number of days before the renewal date when the billing system creates the sales opportunity. This field is applicable only if Create Transaction is specified in the Renewal Action field.
Assign To	No	Name of the employee with a sales person role to whom the renewal sales opportunity will be assigned. This field is applicable only if Create Transaction is specified in the Renewal Action field.
Terminate Un-renewed Subscription	No	Indicates if the subscription item will be terminated if the customer has not acted on the renewal notification after the number of days you specified in the Days after Renewal Date field has lapsed.
Days after Renewal Date	No	Number of days after which the subscription item will automatically be terminated if the customer has not acted on the renewal notification. This field is applicable only if you enabled the Terminate Un-renewed Subscription option.

Charge Plan Data

CSV Import Settings:

- Import Type: Custom Records
- Record Type: Charge Plan

Field	Required	Description
Name	Yes	Name of the charge plan.
Charge Type	Yes	Type of service for the subscription plan items that will use this charge plan. The billing system applies different charge calculations for different types of subscription items. ▪ Recurring Service ▪ Variable Usage ▪ Fixed Usage ▪ Termination Fee
Billing Method	Yes	This field determines how the subscription item is to be billed. ▪ Advance ▪ Arrears
Prorate Fee on Sale	No	Indicates if you want to apply proration on new recurring service and fixed usage subscription items that use this charge plan. This field is applicable only if the charge type is set to recurring service or fixed usage.

Field	Required	Description
Prorate Fee on Termination	No	Indicates if you want to apply proration on termination fee, recurring service, and fixed usage subscriptions items that use this charge plan. This field is applicable only if the charge type is set to recurring service, fixed usage, or termination fee.
Prorate Included Usage on Sale	No	Indicates if you want to apply proration on the included usage of new variable usage subscriptions items that use this charge plan. This field is applicable only if the charge type is set to variable usage.
Prorate Included Usage on Termination	No	Indicates if you want to apply proration on included usage of terminated variable usage subscription items that use this charge plan. This field is applicable only if the charge type is set to variable usage.
Allow Line Discount	No	Indicates if you want to allow line discounting for the secondary subscription items that will use this charge plan.
Allow Custom Rate	No	Indicates if you want to allow specifying a custom rate for the secondary subscription items that will use this charge plan.
Allow Item Uplift	No	Indicates if you want to allow price uplift for the secondary subscription items that will use this charge plan.

Subscription Plan and Subscription Plan Item Data

Subscription Plan Data

Note: Updating subscription plan records using CSV import is currently not supported.

CSV Import Settings:

- Import Type: Custom Records
- Record Type: Subscription Plan

Field	Required	Description
Name	Yes	The name of the subscription plan.
Lead Item	Yes (if Product Line is not specified)	This field specifies the item to which the subscription plan is associated. **Note:** You can use a lead item or a product line when creating a subscription plan, but you cannot specify values for both fields.
Product Line	Yes (if Lead Item is not specified)	This field specifies the product line to which the subscription plan is associated. **Note:** You can use a lead item or a product line when creating a subscription plan, but you cannot specify values for both fields. Renewal and plan migration are currently not supported for subscription plans that are linked to a product line.
Default	No	This field indicates whether the subscription plan is the default for the specified lead item.
Billing Mode	Yes	This field specifies how the billing system determines the dates when a subscription is due to be invoiced. - Anniversary - Fixed Date

Field	Required	Description
Currency	Yes (for accounts with multiple currencies)	In accounts with enabled Multiple Currencies feature, select the currency of the subscription that will use this subscription plan.
Term	Yes	Number of months that the subscription item will be effective. A renewal action occurs 30 days before the subscription item's end date. ▪ Perpetual ▪ 3 months ▪ 6 months ▪ 12 months ▪ 18 months ▪ 24 months ▪ 36 months ▪ 48 months ▪ 60 months ▪ 72 months ▪ 84 months ▪ 96 months ▪ 108 months ▪ 120 months
Minimum Term	Yes (if the term is more than 36 months)	Minimum number of charges that will be created in advance for the subscription plan. ▪ 3 months ▪ 6 months ▪ 12 months ▪ 18 months ▪ 24 months ▪ 36 months **Note:** This field is required if the term is more than 36 months.
Notice Period	No	Period wherein new charges are created for the item in the subscription plan. The number specified represents the number of future charges (relative to the current charge period) that must always be available for the item. You can enter any positive integer from 1 to 120. **Note:** This field is applicable only if the term is more than 36 months.
Termination Method	Yes	Period when the termination of the subscription that will use this subscription plan becomes effective. ▪ End of billing period ▪ Upon cancellation
Start Date	Yes	Start date of the subscription plan effectivity.
End Date	No	End date of the subscription plan effectivity.

Field	Required	Description
Subsidiary	Yes	Subsidiary to which transactions from subscriptions that will use this subscription plan will be posted
Renewal Action	No	Renewal action that will be used when the subscription item enters pending renewal state. ▪ Automatically Renew ▪ Await customer acceptance ▪ Create Transaction **Note:** This field is not applicable if the subscription plan term is perpetual.
Migrate on Renew	No	Indicates if the subscription item will be migrated to a new subscription plan upon renewal. **Note:** This field is not applicable for subscription plans without Renewal Action values.
Migrate To Subscription Plan	No	New subscription plan where the subscription item will be migrated to upon renewal. **Note:** This field is applicable only when the Migrate on Renew field is enabled.
Term on renew	No	Term for the renewed subscription item. ▪ Perpetual ▪ 3 months ▪ 6 months ▪ 12 months ▪ 18 months ▪ 24 months ▪ 36 months ▪ 48 months ▪ 60 months ▪ 72 months ▪ 84 months ▪ 96 months ▪ 108 months ▪ 120 months **Note:** This field is applicable only if the renewal action is Automatically Renew or Await Customer Acceptance.
Minimum Term on Renew	No	Minimum number of charges that will be created in advance for the renewed subscription item. ▪ 3 months ▪ 6 months ▪ 12 months

Field	Required	Description
		■ 18 months ■ 24 months ■ 36 months **Note:** This field is required if the term on renew is more than 36 months.
Notice Period on Renew	No	Period wherein new charges are created for the item in the subscription plan. The number specified represents the number of future charges (relative to the current charge period) that must always be available for the item. You can enter any positive integer from 1 to 120. **Note:** This field is applicable only if the term on renew is more than 36 months.
Transaction Type	No	Indicates the type of transaction that will be created if the renewal action is set to Create Transaction. ■ Opportunity ■ Estimate ■ Sales Order **Note:** This field is applicable only if the renewal action is Create Transaction.
Days In Advance	No	Number of days before the renewal date when the renewal transaction will be created. Value must be between 0 and 30 days. **Note:** This field is applicable only if the renewal action is Create Transaction.
Assign To	No	Sales person to whom the renewal sales opportunity will be assigned. **Note:** This field is applicable only if the renewal action is Create Transaction.
Days after Renewal Date	No	Number of days after the renewal date when the subscription item will automatically be terminated if the customer has not acted on the renewal notification. **Note:** This field is applicable only if the renewal action is Await Customer Acceptance or Create Transaction.

Subscription Plan Item Data

CSV Import Settings:

- Import Type: Custom Records
- Record Type: Subscription Plan Item

Field	Required	Description
Item	Yes	Item that will be sold as a subscription plan item within the subscription plan.
Subscription Plan	Yes	Parent subscription plan record.
Charge Type	Yes	Type of subscription plan item. The billing system applies different charge calculations for different types of subscription items. ■ **Recurring Service** – recurring items ■ **Variable Usage** – usage-based items with usage amounts that may vary per rating period ■ **Fixed Usage** – usage-based items with fixed usage amounts ■ **Termination Fee** – items that are used as line entries for early termination penalties/charges
Include in TRA	No	Indicates if you want to include the amount of the item based on the rate plan to the total recurring amount. **Note:** This field is applicable only to Recurring Service subscription items.
Quantity	No	Quantity of fixed usage units to allocate to the subscription plan item per rating period. **Note:** This field is applicable only to Fixed Usage subscription items.
Show Zero Amount	No	Indicates if you want to include the subscription item on the invoice even if the charge amount for the item is zero. **Note:** This field is applicable only to Variable Usage subscription items.
Allow Line Discount	No	Indicates if you want to allow line discounting for the subscription plan item.
Allow Custom Rate	No	Indicates if you want to allow entering a custom rate for the subscription plan item.
Allow Item Uplift	No	Indicates if you want to allow price uplift for the subscription plan item.
Billing Method	Yes	Determines when the subscription item will be billed. ■ Advance ■ Arrears
Rate Plan	Yes	Rate plan that will be used to calculate the charges for the subscription plan item.
Billing Frequency	Yes	Period when you want the billing system to generate an invoice entry for the item. ■ Monthly ■ Quarterly ■ Semi-Annually ■ Yearly ■ 18 Months ■ Biennial ■ Triennial

<table>
<tr><th>Field</th><th>Required</th><th>Description</th></tr>
<tr><td>Rating Frequency</td><td>Yes</td><td>Period or frequency for the specified rate.
Monthly
Quarterly
Semi-Annually
Yearly
18 Months
Biennial
Triennial
Important Things to Note:
You can set different rating and billing frequencies for recurring service items, provided they meet the following conditions:
Billing frequency must be less then the rating frequency.
Rating frequency must be divisible by the billing frequency.
Rating and billing frequencies must be set to the same value for termination fee, variable usage, and fixed usages items.
Rating frequency must be less than or equal to the subscription plan term.
Subscription plan term must be divisible by the rating frequency.</td></tr>
<tr><td>Prorate Fee On Sale</td><td>No</td><td>Indicates if you want to apply proration on new recurring service and fixed usage subscription items.</td></tr>
<tr><td>Prorate Fee On Termination</td><td>No</td><td>Indicates if you want to apply proration on termination fee, recurring service, and fixed usage subscriptions items.</td></tr>
<tr><td>Prorate Included Usage On Sale</td><td>No</td><td>Indicates if you want to apply proration on the included usage of new variable usage subscriptions items.

Note: This field is not applicable to recurring service, fixed usage, and termination fee items.</td></tr>
<tr><td>Prorate Included Usage on Termination</td><td>No</td><td>Indicates if you want to apply proration on the included usage of terminated variable usage subscription items.

Note: This field is not applicable to recurring service, fixed usage, and termination fee items.</td></tr>
<tr><td>Offset</td><td>Yes</td><td>Number of rating periods from the subscription start date when the subscription item starts.
For example, if a subscription plan with a monthly rating frequency has a start date of January 1, and you enter 2 as the offset value for one of its component items, the start date of that item would only commence after 2 rating periods from the subscription start date has elapsed. In this case, the item's start date will be set to March 1.
The start date of the subscription plan item will follow the start date of the subscription plan if you leave the offset value to its default setting of 0.</td></tr>
<tr><td>Duration</td><td>No</td><td>Number of rating periods that the subscription plan item is active.
For example, if a subscription plan with a monthly rating frequency has a 12 month term, and you entered 6 as the duration value for one of its component items, that item would only be effective for 6 months within the 12 month term of the subscription plan. The start and end dates for that item would depend on the values you entered in the Offset and Duration fields.</td></tr>
<tr><td>Unit</td><td>No</td><td>Unit for the Offset and Duration fields.</td></tr>
</table>

Field	Required	Description
		The Recurring Billing SuiteApp currently only supports Rating Period as the unit for the offset and duration settings of a subscription plan item. The SuiteApp will be updated to support other types of units.

Subscription Sales Order Data

> **Important:** CSV import for standard sales order is not yet fully supported. If you need to use the Recurring Billing features that are available only in the standard sales order, you can follow the procedures detailed in Subscription Sales Order Data (Standard Form). Use precaution when you prepare and import your CSV files because the procedures detailed in that section are prone to errors and are not guaranteed by the system.
>
> If you are not using features released in Recurring Billing version 14.2 and later (such as, product line and custom end date), you should use the Recurring Billing custom form for CSV import (see Subscription Sales Order Data (Custom Form)). Custom pricing is also not yet supported for CSV import using the custom form.

Subscription Sales Order Data (Custom Form)

CSV Import Settings:

- Import Type: Transactions
- Record Type: Sales Order
- (Step 2) Import Options > Advanced Options > Custom Form: Subscription Billing - Sales Order

Field	Required	Description
Customer	Yes	Customer name or ID.
External ID	Yes	Unique ID per record. This unique ID should be included in every line of the CSV file.
Subscription Start Type	Yes	Start type of the subscription: - On start date - To be started manually
Subscription Option	Yes	Specifies whether you want to create a new subscription from the sales order or add the sales order items to an existing subscription. - **New Subscription** – creates a new subscription from the sales order - **Add to Existing, align with current billing close and prorate** – adds the sales order item to an existing subscription and adjust its billing date to align with the current billing cycle of the subscription. Proration will be applied to charges that fall within the current billing cycle. - **Add to Existing, align with next billing cycle start with no proration** – adds the sales order item to an existing subscription and adjust its billing date to align with the next billing cycle of the subscription. No proration will be applied to charges that fall outside of the next billing cycle.
Transaction Type	Yes	Specifies if you are entering the sales order as an invoice or cash sales.

Field	Required	Description
		Note: You can only select cash sales if a default credit card information is set on the customer record.
Subscription	Yes (if the subscription option is Add to Existing)	Existing subscription where you want to add the sales order item. **Note:** This field is applicable only if you selected Add to Existing in the Subscription Option field.
Fixed Billing Date	Yes (if billing mode is Fixed Date)	Specifies the date to perform billing and determines the subscription cycle start and end dates. This field is required only if a subscription plan with fixed date billing mode is selected.
Time Zone	Yes	Subscription time zone. This time zone is used to determine the start and end dates of subscription items.
Items: Item	Yes	Sales order line item.
Items: Start Date	Yes	Start date for the subscription item.
Items: Subscription Plan	No	Subscription plan that is associated with the sales order line item. This subscription plan will be used by the sales order to generate a subscription.
Items: Discount	No	Discount that will be applied to the line item. **Note:** Discount will be applied to subscription items whose **Allow Line Discount** box is checked. If a discount per item has already been specified through the **Customize Subscription Price** button, you will not be able to specify a sales order line item discount.

Subscription Sales Order Data (Standard Form)

CSV import for standard sales order involves a 4-step procedure. **Use precaution when you prepare and import your CSV files because these procedures are prone to errors and are not guaranteed by the system.**

1. Importing Subscription Sales Order Data
2. Importing Line Item Data
3. Importing Subscription Adjustment Data (optional step for custom pricing)
4. Importing the Sales Order Record

Importing Subscription Sales Order Data

CSV Import Settings:

- Import Type: Custom Records
- Record Type: SO Subscription Info

Field	Required?	Description
Subscription Start Type	Yes	Start type of the subscription: ▪ On start date ▪ To be started manually

Field	Required?	Description
Subscription Option	Yes	Specifies whether you want to create a new subscription from the sales order or add sales order items to an existing subscription. - **New Subscription** – creates a new subscription from the sales order - **Add to Existing, align with current billing close and prorate** – adds the sales order item to an existing subscription and adjust its billing date to align with the current billing cycle of the subscription. Proration will be applied to charges that fall within the current billing cycle. - **Add to Existing, align with next billing cycle start with no proration** – adds the sales order item to an existing subscription and adjust its billing date to align with the next billing cycle of the subscription. No proration will be applied to charges that fall outside of the next billing cycle.
Subscription	Yes (if the subscription option is Add to Existing)	Existing subscription where you want to add the sales order item. **Note:** This field is applicable only if you selected Add to Existing in the Subscription Option field.
Transaction Type	Yes	Specifies if you are entering the sales order as an invoice or cash sales. **Note:** You can only select cash sales if a default credit card information is set on the customer record.
Fixed Billing Date	No	If billing mode is Fixed Date, Fixed Billing Date can be entered manually or automatically computed based on the line items. If provided, make sure the date is included in the Fixed Billing Date list.
Time Zone	Yes	Subscription time zone. This time zone is used to determine the start and end dates of subscription items.

Important: After a successful CSV import for Step 1, take note of the internal ID of the SO subscription info record. To see the SO Subscription Info list, go to Customization > Lists, Records, & Fields > Record Types and click the **List** link for **SO Subscription Info**.

Importing Line Item Data

CSV Import Settings:

- Import Type: Custom Records
- Record Type: SO Line Item Info

Warning: Multiple line items may yield errors if not properly mapped. CSV import for SO Line Item Info currently has no validation for subscription info ID, lead item, subscription plan, and line number fields.

Field	Required?	Description
Subscription Info ID	Yes	Internal ID of the SO subscription info record from Step 1: Importing Subscription Sales Order Data. **Note:** There is currently no validation to check if the subscription info is already linked to a subscription.
Lead Item	Yes	Sales order line item.

Field	Required?	Description
		Note: There is currently no validation for lead item and subscription plan relationship.
Subscription Plan	Yes	Subscription plan that is associated with the sales order line item. This subscription plan will be used to generate a subscription. **Note:** There is currently no validation for lead item and subscription plan relationship.
Line Number	Yes	Line item number. **Note:** There is currently no validation to check if the line number matches the number of items to be linked to the sales order record (in Step 4).
Start Date	Yes	Start date for the subscription item.
End	No	Custom end date for the subscription item. Custom end date must not be less than one rating period from the start date and not more than 120 months from the start date. For more information on custom term, see Entering a Subscription Sales Order. Custom term is not supported if **Subscription Start Type** is set to **To be started manually** (from Step 1). If a custom end date is specified but the **Subscription Start Type** is set to **To be started manually**, there will be no CSV import error returned but the term and end date values will follow the subscription plan's term.
Notice Period	No	Notice period for the subscription item. This value represents the minimum number of future charges (relative to the current charge period) that must always be available for the item. This field is applicable only if you set a custom end date in the End Date field that results to a term of more than 36 months. You can specify any positive integer from 1 to 120.
Discount	No	Discount that will be applied to the line item. **Note:** Discount will be applied to subscription items whose **Allow Line Discount** box is checked. If a discount per item has already been specified through the **Customize Subscription Price** button, you will not be able to specify a sales order line item discount.
Co-Term	No	Co-term alignment option. This field is applicable only if the **Subscription Option** is **Add to existing** (from Step 1). For more information, see Co-termination. ■ **Add new item but no co-term alignment** – Adds a new item to an existing subscription without aligning the end dates. ■ **Align new item's co-term with existing subscription** – Adds a new item and aligns its end date to the existing subscription item's end date. You can align multiple new items to the same existing item. A newly added item's end date can only be truncated. ■ **Align existing item's co-term with newly added item** – Adds a new item to an existing subscription and aligns the existing subscription item's end date to the new item's end date. You can co-term an existing item with a newly added item only one time (1:1). An existing item's end date can only be extended. Co-term is not supported if **Subscription Start Type** is set to **To be started manually** (from Step 1).

Field	Required?	Description
Co-Term Item	Yes (if co-term option is align new or align existing)	If you choose to align the end dates using co-term, specify a co-term item.
Start Type	No	Start type for the subscription item. ■ Immediate – Creates the subscription with the subscription item status set to Open or Pending, depending on the subscription item start date. ■ Suspended – Creates the subscription with the subscription item status set to Suspended. For more information, see Creating Subscription Items in Suspended State.

Importing Subscription Adjustment Data

CSV Import Settings:

- Import Type: Custom Records
- Record Type: Subscription Adjustment Info

Field	Required?	Description
Subscription Info ID	Yes	Internal ID of the SO subscription info record from Step 1: Importing Subscription Sales Order Data.
Line Number	Yes	Line item number from Step 2: Importing Line Item Data.
Subscription Plan	Yes	Subscription plan for the line item. The subscription plan must be the same subscription plan selected for the line item in Step 2.
Subscription Plan Item	Yes	Internal ID of the subscription plan item that belongs to the subscription plan. **Note:** Reference type for this field should be set to Internal ID. You can set this during CSV import, when you reach Step 4 (Field Mapping). For more information, see the help topic Select Reference Types.
Adjustment Type	Yes	Subscription adjustment type. ■ Fixed Usage ■ Discount ■ Rate For more information on custom pricing, see Configuring Subscription Item Rate.
Rate Plan	Yes (if custom rate)	If the subscription plan item has multiple rate plans, specify the rate plan where the custom rate will be applied.
Value	Yes	Value for custom rate, discount, or quantity.

Importing the Sales Order Record

CSV Import Settings:

- Import Type: Transactions

- Record Type: Sales Order

> **Warning:** Multiple line items may yield errors if not properly mapped. CSV import for standard sales order currently has no validation for subscription info ID and line item mapping.

Field	Required?	Description
Customer	Yes	Customer name or ID.
External ID	Yes	Unique ID per record. This unique ID should be included in every line of the CSV file.
Subscription Info ID	Yes	Internal ID of the SO subscription info record from Step 1: Importing Subscription Sales Order Data. **Note:** There is currently no validation to check if the subscription info ID is already linked to another sales order or if it is assigned to multiple sales order records in a single CSV import.
Date	No	Transaction date for the sales order.
Status	No	Status of the sales order. - Pending Approval - Pending Fulfillment
Item	Yes	Sales order line item. Item must match the lead item specified in Step 2: Importing Line Item Data. **Note:** There is currently no validation for line item mapping.
Start Date	Yes	Start date for the subscription item. **Note:** The start date specified on the standard sales order has no effect on the subscription. The subscription item will follow the start date specified in Step 2: Importing Line Item Data.
Quantity	Yes	Quantity for the sales order item.

Usage Data

Usage Data

When importing usage data, make sure to complete the import before the scheduled run of the rating engine. The rating engine generates charges for variable usage. If you imported usage data after the scheduled run of the rating engine, the billing system will not be able to pick up the charges for the imported data when the billing engine runs. The billing engine generates invoices, cash sales, and credit memos for subscriptions based on the charges generated by the rating engine.

The rating engine script and billing engine script are deployed by its corresponding scheduler scripts, SWV_SB_SS_REScheduler and SWV_SB_SS_BEScheduler. The scheduler scripts are not scheduled by default. You must specify your preferred schedule for the deployment of these scheduler scripts. For more information, see Setting Up Recurring Billing Script Deployment Schedules

CSV Import Settings:

- Import Type: Custom Records
- Record Type: Usage Data

Field	Required	Description
Record ID	Yes	Unique identifier of a usage record.
Service	Yes	Unique name of a service that is purchased by a customer through a subscription.
Service Type	No	The category of the service purchased by a customer.
Service Date	Yes	This information must be supplied if the Customer ID field in the system preferences is enabled. Values for this field should be entered in the date-time format.
Customer ID	No	NetSuite customer ID. This is used as a key field. Values for this field must be supplied if the Customer ID option is enabled on the Rating Defaults subtab of the Subscription Billing Preferences page.
Subscription ID	No	The unique identifier of the customer's subscription. Values for this field must be supplied if the Subscription ID option is enabled on the Rating Defaults subtab of the Subscription Billing Preferences page.
Secondary Subscription Item ID	Yes	The unique identifier of the ratable item (secondary subscription item). Values for this field must be supplied if the Secondary Subscription Item ID is enabled on the Rating Defaults subtab of the Subscription Billing Preferences page.
Item ID	No	The unique identifier of the item. Values for this field must be supplied if the Item ID field is enabled on the Rating Defaults subtab of the Subscription Billing Preferences page.
Start Date	No	The date the usage event started.
End Date	No	The date the usage event ended. **Note:** If you specified start date and end date values for the usage data, the usage event duration is automatically calculated and is shown in the **Duration** field on the usage data record.
Usage Unit	Yes	The Usage Unit is the basic unit of measure that can be counted and charged. A rate is applied to the usage to compute usage charges. Examples of a usage unit, include: ■ minutes ■ text messages ■ therms (Utilities) ■ KWH (Utilities) ■ Bytes (SaaS storage. B2B telecom) ■ Licensees/seats (SaaS and traditional software companies) ■ Revenue ■ Toll fares (EZ-Pass)
Usage Quantity	Yes	Quantity of usage units used by the customer during the rating period.
Usage Description	No	A description of the usage item and its terms.
Cost	No	The cost incurred from a third party.
Ratable Cost	No	The difference between the cost incurred from a third-party and the cost incurred for rating purposes.

> **Note:** You can also manually enter individual usage data records. Go to Customization > Lists, Records, & Fields > Record Types and select **Usage Data**. Click **View Records**. On the Usage Data List page, click **New** to create a new usage data record.
>
> The fields on the Usage Data form are the same as the fields for usage data import. Note that the **Service Date**, **Usage Unit**, and **Usage Quantity** fields are required in the user interface. Also, if you want to specify a Secondary Subscription Item ID, you must first select a Customer ID and Subscription ID.

Invoicing

Invoicing is the process of creating bills (invoices) for goods and services that customers receive. An invoice is a record of a sale to a customer. Each invoice consists of multiple line items whose amounts add up to the total invoice amount. The invoice also indicates terms of payment that specify when you expect to receive the money owed to you. With the Recurring Billing SuiteApp, an invoice is generated at the end of each billing cycle.

See the following topics for more information on how the Recurring Billing SuiteApp generates invoices for subscriptions:

- Invoice Aging
- Invoicing Process
- Billing Modes
- Billing Methods
- Usage-Based Billing
- Generating Invoices for Fixed Date Subscriptions
- Generating an Invoice for a Specific Customer Subscription
- Pre-Billing
- Rolling Back the Subscription Bill Dates
- Subscription Invoice

Invoice Aging

Invoice aging is a functionality that tracks your customer's payment history, organized by invoice, and shows how those payments were applied to invoices. For each customer who owes you money, the aging report shows what the customer owes for the current billing period and what they have not paid from previous billing periods. Aging can also be used by businesses to penalize a customer by applying late payment fees.

An invoice starts to age when it is created. The remaining balance of a partially paid invoice is subject to aging. An invoice ceases to age when it is paid in full or a payment dispute has been logged for that invoice. If the disputed invoice returns to a Payment Due state, aging is applied from the original invoice creation minus the amount of time that it was being disputed.

Invoicing Process

The following table outlines the internal processes performed by the Recurring Billing SuiteApp when generating invoices:

Process	Description
1. Retrieve subscriptions due for billing	Subscriptions are retrieved based on their status and due dates. Subscriptions that are due for billing are processed for invoicing. Due dates vary depending on the type of bill run selected for the item on its associated subscription plan. For more information, see Billing Modes.
2. Validate subscription data	For each subscription record, the billing module checks if the data was properly updated during the last bill run.
3. Retrieve subscription items	The billing system retrieves subscription items, if any, from each subscription record that are due for billing. Subscription items are specified in the line items of the subscription sales order.
4. Retrieve price of item	The billing system retrieves the charges for each item. Subscription item charges are based on the pricing schedule specified in its associated subscription plan. Item prices may vary per billing period due to the application of discounts and promotions. **Note:** Charges set to On Hold at the start of the invoicing process will be ignored by the billing engine.
5. Add line item in the invoice or cash sale	The billing system adds the subscription items and their corresponding charges to the invoice or cash sales.
6. Retrieve usage-based items	The billing module retrieves usage-based items, if any, from each subscription record that are due for billing. Usage-based items are specified in the line items of the subscription sales order.
7. Rate usage-based items	The billing module retrieves the charges for each usage-based item. Usage-based item charges are based on the rating model specified in its associated rate plan and the pricing schedule of its subscription plan. Usage-based charges may vary per rating period depending on the amount of usage. **Note:** Charges set to On Hold at the start of the invoicing process will be ignored by the billing engine.
8. Add usage-based item in the invoice or cash sale	The billing module adds the usage-based items and their corresponding charges to the invoice or cash sales.
9. Create a transaction record	The billing module creates a transaction to record the financial exchange between your business and its customers.
10. Create pro forma invoice (Optional)	You can generate pro forma invoices in advance of the actual bill run. For more information, see Generating Pro Forma Invoices.
11. Update subscription and subscription items	The billing module updates the last billing date and next billing date information for each subscription and subscriptions items that have been invoiced.

Billing Modes

Billing modes determine the dates when a subscription is due to be invoiced. The Recurring Billing SuiteApp supports two types of billing mode or bill run types:

- Anniversary Billing
- Fixed Date Billing

For information on setting up billing modes, see Setting Up Subscription Plans.

A subscription record can only have items with similar billing modes. For example, you cannot add an item with a Fixed Date billing mode to a subscription with an Anniversary billing mode items. For more information, see Entering a Subscription Sales Order and Adding Items to a Subscription.

Anniversary Billing

Anniversary Billing is a billing mode wherein the customers are billed on the day they signed up for the subscription. For example, if a customer signs up for a subscription on January 15 and the billing frequency for the subscription plan item is set to monthly, billing cycles start on the 15th of the month and end on the 14th of the following month.

For Anniversary subscriptions with a start date that falls on a month end, the Month-End Anniversary Billing preference determines the subscription’s Billing Date Type and the billing cycle dates for the subscription items. To enable billing on the last day of the month, check the **Month-End Anniversary Billing** box on the **General Billing Defaults** subtab of the Subscription Billing Preferences page. For more information, see Setting Up Recurring Billing Preferences.

- If the **Month-End Anniversary Billing** box is cleared, and an Anniversary subscription’s start date falls on a month end:
  - The subscription’s **Billing Date Type** field will be set to **Earliest Start Date**.
  - The billing cycle of the subscription items will start on the same day as the start date. For example, if the subscription start date is March 31, billing cycle dates start on the 31st of the succeeding months. For months that do not have 31 days, the billing cycle starts on the 1st day of the following month. For a subscription item with a monthly billing frequency and a 3-month term, billing cycle dates will be:
    - March 31 to April 30
    - May 1 to May 30
    - May 31 to June 30
- If the **Month-End Anniversary Billing** box is checked, and an Anniversary subscription’s start date falls on a month end:
  - The subscription’s **Billing Date Type** field will be set to **Last Day of the Month**.
  - The billing cycle of the subscription items will always start on a month end. For example, if the subscription start date is March 31, the billing cycle dates for an item with a monthly billing frequency and a 3-month term will be:
    - March 31 to April 29
    - April 30 to May 30
    - May 31 to June 29

The Month-End Anniversary Billing preference has no effect on Anniversary subscriptions with a start date that does not fall on a month end. These subscriptions will always have a **Billing Date Type** field set to **Earliest Start Date**, and the billing cycle dates will start on the same day as the subscription start date.

For Anniversary subscriptions that include multiple items with different start dates, the subscription start date is based on the subscription item with the earliest start date. For more information about billing cycle dates for Anniversary subscriptions, see Billing Cycle Dates of Anniversary Subscriptions.

The invoicing of subscriptions with Anniversary billing modes is automatically run by the billing system. The schedule of the bill run depends on the subscription's status and due dates. The Recurring Billing SuiteApp does not currently support the creation of pro forma invoices for Anniversary subscriptions.

Charges can be prorated for Anniversary subscriptions depending on the proration options set in the subscription plan item record. For more information, see Setting Up Subscription Plan Items.

Fixed Date Billing

Fixed Date is a billing mode wherein the customers are billed on a billing date that is selected during subscription sales order creation. For this billing mode, you need to specify a set of available billing dates and associate them with one or more rating frequencies. For information about setting up your Fixed Billing Dates list, see Setting Up Fixed Billing Dates.

For Fixed Date subscriptions, the billing cycle dates are based on the Fixed Billing Date selected on the subscription sales order. For example, if you have a subscription with a start date of January 1, a Fixed Billing Date of January 15, and an item with a monthly billing frequency, billing cycles start on the 15th of the month and end on the 14th of the following month. Because the start date and the Fixed Billing Date do not fall on the same day, the first and last billing periods for the item will be prorated. In this example, billing cycle dates for a 3-month term will be:

- January 1 to January 14
- January 15 to February 14
- February 15 to March 14
- March 15 to March 31

For more information about billing cycle dates for Fixed Date subscriptions, see Billing Cycle Dates of Fixed Date Subscriptions.

The options in the **Fixed Billing Date** field during subscription sales order creation depend on the Fixed Billing Dates list, subscription start date, and rating frequency. When you enter line items on a subscription sales order and select a subscription plan with a Fixed Date billing mode, a query is run against the Fixed Billing Dates list to find the available billing dates in the period from the day after the subscription item start date until the end of the first rating period. Only billing dates found within the period and associated with the subscription plan's rating frequency will be shown in the **Fixed Billing Date** field on the subscription sales order (or on Recurring Billing configurator if a standard sales order is used). If there are multiple items on a subscription sales order, the values in the **Fixed Billing Date** field will depend on the start date and rating frequency of the item with the least frequent rating period. If there is only one valid billing date, this date is automatically selected as the Fixed Billing Date for the subscription.

> **Note:** The options in the **Fixed Billing Date** field may change as you add line items on a subscription sales order. If you are using the standard sales order or a custom form based on the standard sales order, you can assign a different value in the **Fixed Billing Date** field each time you configure a line item using the Recurring Billing configurator. However, note that the actual Fixed Billing Date for the subscription will be the last date that you selected. For more information, see Entering Subscription Information on Sales Transaction Records (Recurring Billing Configurator).

Proration can be applied on Fixed Date subscriptions depending on the proration options set on the subscription plan of the items. Proration can be applied to a new fixed date subscription if its sign up date does not fall on the same day as the bill start date. Proration can be applied to a terminated subscription if its termination date does not fall on the same day as the bill end date. For more information on setting up proration options, see Setting Up Subscription Plan Items.

Billing Cycle Dates of Anniversary Subscriptions

- Example 1: Billing Cycle Dates of Anniversary Subscriptions
- Example 2: Billing Cycle Dates of Anniversary Subscriptions with End of Month Start Date
- Example 3: Billing Cycle Dates of Anniversary Subscriptions with Different Item Start Dates

Example 1: Billing Cycle Dates of Anniversary Subscriptions

Billing cycle dates for Anniversary subscriptions are based on the subscription start date.

The following table shows the billing cycle dates for an Anniversary subscription with a start date of January 1, 2016 and a monthly billing frequency. Billing cycles start on the 1st of the month.

Item	Start Date	Term	Billing/Rating Frequency	Billing Cycle Start Date	Billing Cycle End Date
Item 1	January 1, 2016	6 months	Monthly	January 1, 2016	January 31, 2016
				February 1, 2016	February 29, 2016
				March 1, 2016	March 31, 2016
				April 1, 2016	April 30, 2016
				May 1, 2016	May 31, 2016
				June 1, 2016	June 30, 2016

The following table shows the billing cycle dates for an Anniversary subscription with a start date of January 20, 2016 and a quarterly billing frequency. Billing cycles start on the 20th of the month.

Item	Start Date	Term	Billing/Rating Frequency	Billing Cycle Start Date	Billing Cycle End Date
Item 1	January 20, 2016	12 months	Quarterly	January 20, 2016	April 19, 2016
				April 20, 2016	July 19, 2016
				July 20, 2016	October 19, 2016
				October 20, 2016	January 19, 2017

Example 2: Billing Cycle Dates of Anniversary Subscriptions with End of Month Start Date

For Anniversary subscriptions where the start date falls on a month end, the subscription's Billing Date Type and subscription item billing cycle dates depend on the Month-End Anniversary Billing preference.

- If this preference is disabled, Anniversary subscriptions with a month-end start date follows the default behavior wherein billing cycle dates start on the same day as the subscription start date (Billing Date Type = Earliest Start Date).
- If this preference is enabled, Anniversary subscriptions with a month-end start date will have billing cycle dates that always start on month end (Billing Date Type = Last Day of the Month).

For more information about Month-End Anniversary Billing preference, see Anniversary Billing and Setting Up Recurring Billing Preferences.

The following table shows the billing cycle dates if the Month-End Anniversary Billing preference is disabled or enabled for an Anniversary subscription with a start date of January 31, 2016 (end of month). Note that for months with less than 31 days, billing cycle starts on the 1st day of the following month if the Billing Date Type is Earliest Start Date.

Item	Start Date	Term	Billing/Rating Frequency	Month-End Anniversary Billing = Disabled (Billing Date Type = Earliest Start Date)		Month-End Anniversary Billing = Enabled (Billing Date Type = Last Day of the Month)	
				Billing Cycle Start Date	Billing Cycle End Date	Billing Cycle Start Date	Billing Cycle End Date
Item 1	January 31, 2016	12 months	Monthly	January 31, 2016	February 29, 2016	January 31, 2016	February 28, 2016

Item	Start Date	Term	Billing/Rating Frequency	Month-End Anniversary Billing = Disabled (Billing Date Type = Earliest Start Date)		Month-End Anniversary Billing = Enabled (Billing Date Type = Last Day of the Month)	
				Billing Cycle Start Date	Billing Cycle End Date	Billing Cycle Start Date	Billing Cycle End Date
				March 1, 2016	March 30, 2016	February 29, 2016	March 30, 2016
				March 31, 2016	April 30, 2016	March 31, 2016	April 29, 2016
				May 1, 2016	May 30, 2016	April 30, 2016	May 30, 2016
				May 31, 2016	June 30, 2016	May 31, 2016	June 29, 2016
				July 1, 2016	July 30, 2016	June 30, 2016	July 30, 2016
				July 31, 2016	August 30, 2016	July 31, 2016	August 30, 2016
				August 31, 2016	September 30, 2016	August 31, 2016	September 29, 2016
				October 1, 2016	October 30, 2016	September 30, 2016	October 30, 2016
				October 31, 2016	November 30, 2016	October 31, 2016	November 29, 2016
				December 1, 2016	December 30, 2016	November 30, 2016	December 30, 2016
				December 31, 2016	January 30, 2017	December 31, 2016	January 30, 2017

Example 3: Billing Cycle Dates of Anniversary Subscriptions with Different Item Start Dates

If the Anniversary subscription includes multiple items with different start dates, the subscription start date is based on the subscription item with the earliest start date.

The following examples show various scenarios for Anniversary subscriptions with different item start dates.

Example 3.1: Different item start dates, same billing frequency

In this example, the subscription follows the start date of Item 1, billing cycles start on the 16th of the month. Note that the first and last periods for Item 2 are prorated based on the item start and end dates.

Item	Start Date	Term	Billing/Rating Frequency	Billing Cycle Start Date	Billing Cycle End Date
Item 1	February 16, 2016	3 months	Monthly	February 16, 2016	March 15, 2016
				March 16, 2016	April 15, 2016
				April 16, 2016	May 15, 2016
Item 2	April 5, 2016	3 months	Monthly	April 5, 2016	April 15, 2016
				April 16, 2016	May 15, 2016
				May 16, 2016	June 15, 2016
				June 16, 2016	July 4, 2016

Example 3.2: Different item start dates, different billing frequency

In this example, the subscription follows the start date of Item 1, billing cycles start on the 25th of the month. Note that the first and last periods for Item 2 are prorated based on the item start and end dates.

Item	Start Date	Term	Billing/Rating Frequency	Billing Cycle Start Date	Billing Cycle End Date
Item 1	June 25, 2016	6 months	Monthly	June 25, 2016	July 24, 2016
				July 25, 2016	August 24, 2016
				August 25, 2016	September 24, 2016
				September 25, 2016	October 24, 2016
				October 25, 2016	November 24, 2016
				November 25, 2016	December 24, 2016
Item 2	August 1, 2016	6 months	Quarterly	August 1, 2016	September 24, 2016
				September 25, 2016	December 24, 2016
				December 25, 2016	January 31, 2017

Example 3.3: Different item start dates, earliest start date is month end

In this example, the subscription follows the start date of Item 1, an item with an end of month start date (April 30, 2016). The following table shows the billing cycle dates if the Month-End Anniversary Billing preference is disabled or enabled for a subscription with two items with different start dates.

Item	Start Date	Term	Billing/Rating Frequency	Month-End Anniversary Billing = Disabled (Billing Date Type = Earliest Start Date)		Month-End Anniversary Billing = Enabled (Billing Date Type = Last Day of the Month)	
				Billing Cycle Start Date	Billing Cycle End Date	Billing Cycle Start Date	Billing Cycle End Date
Item 1	April 30, 2016	3 months	Monthly	April 30, 2016	May 29, 2016	April 30, 2016	May 30, 2016
				May 30, 2016	June 29, 2016	May 31, 2016	June 29, 2016
				June 30, 2016	July 29, 2016	June 30, 2016	July 29, 2016
Item 2	May 10, 2016	3 months	Monthly	May 10, 2016	May 29, 2016	May 10, 2016	May 30, 2016
				May 30, 2016	June 29, 2016	May 31, 2016	June 29, 2016
				June 30, 2016	July 29, 2016	June 30, 2016	July 30, 2016
				July 30, 2016	August 9, 2016	July 31, 2016	August 9, 2016

Billing Cycle Dates of Fixed Date Subscriptions

- Example 1: Billing Cycle Dates of Fixed Date Subscriptions
- Example 2: Billing Cycle Dates of Fixed Date Subscriptions with Different Item Start Dates
- Example 3: Billing Cycle Dates for Fixed Date Subscriptions with End of Month Fixed Billing Date

Example 1: Billing Cycle Dates of Fixed Date Subscriptions

Billing cycle dates of Fixed Date subscriptions are based on the Fixed Billing Date selected on the subscription sales order.

In the following example, the subscription start date is January 15, 2016 and the Fixed Billing Date is February 15, 2016. For an item with a monthly billing frequency, billing cycles start on the 15th of the month and end on the 14th of the succeeding month. Because the start date and the Fixed Billing Date fall on the same day (15th), all billing periods cover one full month.

Fixed Billing Date = February 15, 2016

Item	Start Date	Term	Billing/Rating Frequency	Billing Cycle Start Date	Billing Cycle End Date
Item 1	January 15, 2016	6 months	Monthly	January 15, 2016	February 14, 2016
				February 15, 2016	March 14, 2016
				March 15, 2016	April 14, 2016
				April 15, 2016	May 14, 2016
				May 15, 2016	June 14, 2016
				June 15, 2016	July 14, 2016

If the start date and Fixed Billing Date do not fall on the same day, the first and last billing periods are prorated. The following table shows the billing cycle dates for a Fixed Date subscription with a start date of January 15, 2016 and a Fixed Billing Date of January 25, 2016. For an item with a monthly billing frequency, billing cycles start on the 25th of the month and end on the 24th of the succeeding month, except for the first and last billing periods which are prorated based on the item start and end dates.

Fixed Billing Date = January 25, 2016

Item	Start Date	Term	Billing/Rating Frequency	Billing Cycle Start Date	Billing Cycle End Date
Item 1	January 15, 2016	6 months	Monthly	January 15, 2016	January 24, 2016
				January 25, 2016	February 24, 2016
				February 25, 2016	March 24, 2016
				March 25, 2016	April 24, 2016
				April 25, 2016	May 24, 2016
				May 25, 2016	June 24, 2016
				June 25, 2016	June 14, 2016

Example 2: Billing Cycle Dates of Fixed Date Subscriptions with Different Item Start Dates

If there are multiple items on a subscription sales order, the Fixed Billing Date options are filtered based on the start date and rating frequency of the item with the least frequent rating period. For information about how fixed billing date options are determined, see Fixed Date Billing.

The following example shows the billing cycle dates for a Fixed Date subscription with different item start dates. It also shows how the Fixed Billing Date options are filtered when multiple line items are entered on a subscription sales order.

The following billing dates are entered in the Fixed Billing Date list:

Fixed Billing Date List	Rating Frequency
January 1, 2016	Quarterly
January 15, 2016	Monthly, Quarterly, Yearly
February 1, 2016	Monthly
February 15, 2016	Monthly, Quarterly, Yearly
March 1, 2016	Monthly
March 31, 2016	Quarterly
April 1, 2016	Quarterly
May 1, 2016	Monthly

Then, the following items are entered on a subscription sales order:

Item	Billing Mode (from the Subscription Plan)	Rating Frequency (from the Subscription Plan)	Start Date
Item 1	Fixed Date	Quarterly	February 15, 2016
Item 2	Fixed Date	Monthly	January 1, 2016

The available options in the Fixed Billing Date field on the subscription sales order (or on Recurring Billing configurator) depend on the Fixed Billing Date list and on the start date and rating frequency of the sales order line item with the least frequent rating period. In this example, it will depend on Item 1, which has a start date of February 15, 2016 and a Quarterly rating frequency. The system runs a query against the Fixed Billing Dates list to find available billing dates from February 16, 2016 to May 15, 2016 (that is, one quarter or three months after the item start date) that are associated with Quarterly rating frequency.

From the dates provided in the Fixed Billing Dates list, the valid options that will be shown in the Fixed Billing Date field are March 31, 2016 and April 1, 2016.

The following table shows the billing cycle dates for Item 1 and Item 2 if the Fixed Billing Date selected is April 1, 2016.

Fixed Billing Date = April 1, 2016

Item	Start Date	Term	Billing/Rating Frequency	Billing Cycle Start Date	Billing Cycle End Date
Item 1	February 15, 2016	6 months	Quarterly	February 15, 2016	March 31, 2016
				April 1, 2016	June 30, 2016
				July 1, 2016	August 14, 2016
Item 2	January 1, 2016	6 months	Monthly	January 1, 2016	January 31, 2016
				February 1, 2016	February 29, 2016
				March 1, 2016	March 31, 2016
				April 1, 2016	April 30, 2016
				May 1, 2016	May 31, 2016
				June 1, 2016	June 30, 2016

Example 3: Billing Cycle Dates for Fixed Date Subscriptions with End of Month Fixed Billing Date

The following table shows the billing cycle dates if the Fixed Billing Date is March 31, 2016 (end of month). Billing cycles start on the 31st of the month. For months that do not have 31 days, billing cycle starts on the 1st of the following month.

Fixed Billing Date = March 31, 2016

Item	Start Date	Term	Billing/Rating Frequency	Billing Cycle Start Date	Billing Cycle End Date
Item 1	January 1, 2016	12 months	Quarterly	January 1, 2016	March 30, 2016
				March 31, 2016	June 30, 2016
				July 1, 2016	September 30, 2016
				October 1, 2016	December 30, 2016
				December 31, 2016	December 31, 2016
Item 2	January 1, 2016	6 months	Monthly	January 1, 2016	January 30, 2016
				January 31, 2016	February 29, 2016
				March 1, 2016	March 30, 2016
				March 31, 2016	April 30, 2016
				May 1, 2016	May 30, 2016
				May 31, 2016	June 30, 2016

Billing Methods

The Billing Method of an item determines whether it is billed at the start of a billing cycle (Advance) or at the end of a billing cycle (Arrears). For example, if a subscription item with a monthly billing frequency has a billing cycle of January 1 to January 31, its billing date is set to January 1 if its billing method is Advance or February 1 (bill cycle end + 1 day) if its billing method is Arrears.

Aligning Billing Dates of Subscriptions

You can align the billing dates of a new subscription item to an existing subscription with the same billing frequency by setting the subscription start date of the new subscription to any of the future billing cycle start dates of the existing subscription.

Note: You cannot set the start date of the new subscription item to a date earlier than the start dates of the subscription.

Example 1

In this example, a new subscription with a start date of 10/11/2012 and a quarterly billing frequency is aligned with the billing dates of an existing subscription with the same billing frequency. The **Add to Existing, align with next billing cycle start with no proration** option is selected in the Subscription Option field of the Recurring Billing configurator. Both subscriptions have an Advance billing method.

Subscriptions	Current billing cycle start date	Billing cycle start date 2	Billing cycle start date 3	Billing cycle start date 4	Billing cycle start date 5
Subscription A (existing subscription)	10/10/2012	1/10/2013	4/10/2013	7/10/2013	10/10/2013

Subscriptions	Current billing cycle start date	Billing cycle start date 2	Billing cycle start date 3	Billing cycle start date 4	Billing cycle start date 5
Subscription B (new subscription		1/10/2013 (subscription start date)	4/10/2013	7/10/2013	10/10/2013

When aligning the billing dates of subscriptions with different billing frequencies, the start date of the subscription with the longer billing frequency should be adjusted to coincide with the future billing cycle start dates of the subscription with the shorter billing frequency.

Example 2

In this example, the subscription start date of Subscription A from the earlier example is adjusted to coincide with the 11/10/2012 billing cycle start date of Subscription C which has a shorter billing frequency (monthly). The **Add to Existing, align with next billing cycle start with no proration** option is selected in the Subscription Option field of the Recurring Billing configurator. Both subscriptions have an Advance billing method.

While Subscription A has a start date of 10/11/2012, its start date cannot be aligned with the current billing start date of Subscription C. You can only align the start date of a subscription to future billing cycle start dates of another subscription.

Subscriptions	Billing Cycle Start Date 1	Billing Cycle Start Date 2	Billing Cycle Start Date 3	Billing Cycle Start Date 4	Billing Cycle Start Date 5	Billing Cycle Start Date 6	Billing Cycle Start Date 7	Billing Cycle Start Date 8	Billing Cycle Start Date 9	Billing Cycle Start Date 10	Billing Cycle Start Date 11
Subscription A (quarterly)		11/10/2012 (subscription start date)			2/10/2013			5/10/2013			8/10/2013
Subscription C (monthly)	10/10/2012 (current billing start date)	11/10/2012	12/10/2012	1/10/2013	2/10/2013	3/10/2013	4/10/2013	5/10/2013	6/10/2013	7/10/2013	8/10/2013

Example 3

In this example, the subscription start date of Subscription D which has a start date of 10/11/2012 and a longer billing frequency (semi-annual) is adjusted to coincide with the third billing cycle start date of Subscription A (quarterly). The **Add to Existing, align with next billing cycle start with no proration** option is selected in the Subscription Option field of the Recurring Billing configurator. Both subscriptions have an Advance billing method.

Subscriptions	Current billing cycle start date	Billing cycle start date 2	Billing cycle start date 3	Billing cycle start date 4	Billing cycle start date 5
Subscription A (quarterly)	10/10/2012	1/10/2013	4/10/2013		10/10/2013
Subscription D (semi-annual)		1/10/2013 (new subscription start date)		7/10/2013	

Usage-Based Billing

Variable usage items are usage-based items with usage amounts that vary per rating period. These are subscription plan items with a Variable Usage charge type. Variable usage items can be linked to multiple rate plans within one subscription plan item. For more information about subscription plan items, see Setting Up Subscription Plan Items.

Only rate plans with a checked Usage box can be selected for variable usage items. For information about rate plans, see Creating a Rate Plan.

Upon creation of a subscription, variable usage items are created without charge records. The rating engine (SWV_SB_SS_REScheduler) generates charges from imported usage data for variable usage items. For information about importing usage data, see Importing Recurring Billing Data.

You can set your preferences for the default usage search criteria that will be used by the rating engine for filtering customer usage data prior to processing them for billing. For more information, see Default Usage Search Criteria.

Default Usage Search Criteria

You can set the default search criteria for usage data on the Subscription Billing Preferences page. Go to Subscription Billing > Account Setup > Subscription Billing Preferences. On the **Rating Defaults** subtab, check the box for the fields that you want to set as the default usage search criteria. For more information, see Setting Up Recurring Billing Preferences.

If you check (enable) any of the preferences for Default Usage Search Criteria, it will be used by the rating engine as the default search criteria for filtering customer usage data prior to processing them for rating.

For a better understanding of how the default usage search criteria works, take note of the following:

- If no selection is made, the default filters for usage data are the **Service Date**, **Usage Unit**, and **Usage Quantity** fields.
- When you select a default usage search criteria, the rating engine will search only usage data records that have a value in the corresponding field for the enabled criteria.

  Example:

  - If you check the **Customer ID** box, only usage data records that have a value in the **Customer ID** field will be included in the usage data pool to be processed.
  - If you check both **Customer ID** and **Subscription ID** boxes, only usage data records that have values in both the **Customer ID** and **Subscription ID** fields will be included in the usage data pool to be processed.
- Customer ID, Subscription ID, and Secondary Subscription Item ID follow a hierarchical order.
  - Checking the **Subscription ID** box is the same as enabling both Customer ID and Subscription ID preferences.
  - Checking the **Secondary Subscription Item ID** box is the same as enabling all three preferences —Customer ID, Subscription ID, and Secondary Subscription Item ID.

  This is an effect of the relationship between the usage data record fields for these criteria. On the usage data record, you have to select a value for the **Customer ID** field before you can select a value for the **Subscription ID** field. Also, you have to select a **Subscription ID** before you can select a value for the **Secondary Subscription Item ID** field. This means that if you have a value for the Secondary Subscription Item ID, then you must have also specified values for the Subscription ID and Customer ID.
- If the criteria is enabled (checked) on the system preferences but the field on the usage data record has no value, the usage data record will not be included in the search.

  Example:

Default Usage Search Criteria	Usage Data Record	Search Result
Item ID = checked	**Usage Data 1:** Usage Unit = minutes	If a subscription has Item A with Usage Unit = minutes, Usage Data 1 will not be searched because the rating

Default Usage Search Criteria	Usage Data Record	Search Result
	Usage Quantity = 100 Item ID = (blank)	engine will search only for usage data records with a value for Item ID.

- If the criteria is disabled (not checked) on the system preferences but the corresponding field on the usage data record has a value, this field will be ignored in the search.

  Example:

Default Usage Search Criteria	Usage Data Record	Search Result
Item ID = not checked	**Usage Data 1:** Usage Unit = minutes Usage Quantity = 100 Item ID = Item B	If subscription has Item A with Usage Unit = minutes, Usage Data 1 will be searched even if the subscription has Item A but the Usage Data Item ID is Item B. This is because Item ID is being bypassed in the search (that is, usage data is not filtered by Item ID) because it is not checked on the preferences.

For information on usage data, see Importing Recurring Billing Data.

Calculating the Next Billing Amount for Subscriptions

The **Next Billing Amount** field on subscription records shows the total amount due for the subscription's next billing date. The SWV_SB_MR_CalculateNextBillingAmount map/reduce script calculates the value for the next billing amount. The value is obtained by adding the amounts of all subscription charges with a Ready charge stage and a billing date that is earlier than or equal to the subscription next billing date.

By default, the **Next Billing Amount** field is blank upon subscription creation. The field value is also unset when the subscription goes through any of the following:

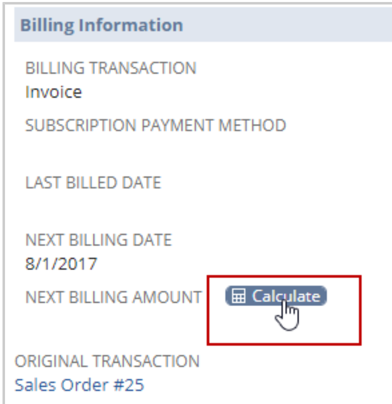
- Subscription is processed for billing or pre-billing - An invoice is generated for the subscription using either the **Run Billing** or **Run Pre-Billing** button, or by running the BEScheduler script.
- Subscription is processed for usage-based rating - Charges are generated for variable usage items in the subscription by the REScheduler script.
- A change order is applied to the subscription - The change order record attached to the subscription has a status of Succeeded or Completed.

To calculate the next billing amount for subscriptions, read the following topics:

- Calculate Next Billing Amount on Subscription Records
- Calculate Next Billing Amount Using a Map/Reduce Script
- Enable Automatic Calculation of Next Billing Amount After Rating

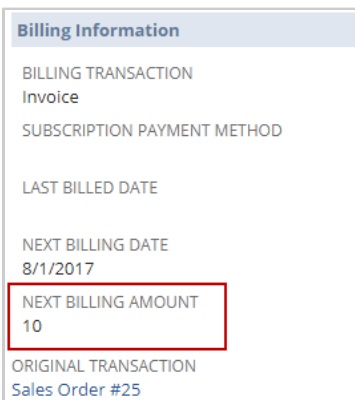
Calculate Next Billing Amount on Subscription Records

You can generate the next billing amount for a specific subscription by clicking the **Calculate** icon next to the **Next Billing Amount** field on the subscription record. This icon is available on subscription records with a value in the **Next Billing Date** field and a blank **Next Billing Amount** field. The **Calculate** icon is not available if the subscription status is Initializing, Suspended, or Terminated.



To obtain an accurate value for the subscription's next billing amount, make sure that the charges for the subscription are updated. When you see the popup window with this message, click **OK** if you are sure that the charges are updated and you want to proceed with the next billing amount calculation. Otherwise, click **Cancel** if you want to verify the charges before calculation.

When you click **OK**, the SWV_SB_MR_CalculateNextBillingAmount map/reduce script gathers all the ready charges for the billing period and calculates the next billing amount for the subscription. When the process is completed, the **Next Billing Amount** field shows the calculated amount.



Calculate Next Billing Amount Using a Map/Reduce Script

The SWV_SB_MR_CalculateNextBillingAmount map/reduce script includes two deployment records that you can use for scheduled or manual runs of the script.

Deployment Title	Deployment ID	Status	Description
SWV_SB_MR_CalculateNextBIllingAmount_Manual	customdeploy_sb_mr_calc_nba_man	Not Scheduled	Use this script deployment record for on-demand calculation of next billing amount for one or more subscriptions.
SWV_SB_MR_CalculateNextBillingAmount_Scheduled	customdeploy_sb_mr_calc_nba_sched	Scheduled	Use this script deployment record to set a scheduled run for the script to regularly update the next billing amount for subscriptions.

Deployment Title	Deployment ID	Status	Description
			Important: The default schedule is set to 6 PM PST daily. You should edit the scheduled deployment record to set your preferred schedule for the next billing amount calculation. Ideally, the next billing amount calculation should run after the scheduled run of the BEScheduler script.

To set a scheduled run for the next billing amount calculation:

1. Go to Customization > Scripting > Scripts.
2. Filter the scripts to show only Map/Reduce script type.
3. Look for the SWV_SB_MR_CalculateNextBillingAmount (customscript_sb_mr_calc_next_bill_amount) script and click the **Deployments** link next to it.
4. Click the **Edit** link for the scheduled deployment record: SWV_SB_MR_CalculateNextBillingAmount_Scheduled (customdeploy_sb_mr_calc_nba_sched).
5. On the **Schedule** subtab, specify your preferred schedule for the next billing amount calculation.

   Note: The dates that you specify in the script deployment schedule follows the user preference time zone.

6. Make sure that the **Deployed** box is checked and the status is set to **Scheduled**.

   Note: You should not specify values on the **Parameters** subtab of the scheduled deployment record. The fields on the **Parameters** subtab should be used only for on-demand (manual) runs where you need to identify specific records to be processed. When you leave these fields blank, the scheduled run will process all subscriptions with a value for Next Billing Date and with available charges.

7. Click **Save**.

To manually run the next billing amount calculation:

1. Go to Customization > Scripting > Scripts.
2. Filter the scripts to show only Map/Reduce script type.
3. Look for the SWV_SB_MR_CalculateNextBillingAmount (customscript_sb_mr_calc_next_bill_amount) script and click the **Deployments** link next to it.

4. Click the **Edit** link for the manual (not scheduled) deployment record: SWV_SB_MR_CalculateNextBillingAmount_Manual (customdeploy_sb_mr_calc_nba_man).
5. On the **Parameters** subtab, you can select a value for one of the following script parameters if you want to filter the subscriptions that will be processed for next billing amount calculation:
   - **Saved Search** – Specify a saved search to calculate the next billing amount only for subscriptions that are included in the search results. The saved search must be subscription type and set to public. For information about defining saved searches, see the help topic Defining a Saved Search.
   - **Subscription ID** – Enter the subscription ID of the specific subscription for which you want to calculate the next billing amount.

   Only one parameter can be specified. If you did not specify any parameter, the script will generate the next billing amount value for all subscriptions with a value for Next Billing Date and with available charges.
6. Make sure that the **Deployed** box is checked and the status is set to **Not Scheduled**.
7. Click **Save and Execute** in the Save dropdown menu.

Enable Automatic Calculation of Next Billing Amount After Rating

When a subscription with usage data for the period is processed by the REScheduler script, the script sets the subscription’s **Next Billing Amount** field to blank.

You can set up automatic calculation of the next billing amount after subscriptions are processed for usage-based rating.

To set up automatic calculation of next billing amount after rating:

1. Go to Subscription Billing > Account Setup > Recurring Billing Preferences.
2. Click **Edit**.
3. Click the **General Preferences** subtab.
4. Check the **Calculate Next Billing Amount After Rating** box. When this box is checked, the SWV_SB_MR_CalculateNextBillingAmount script will automatically run after every completed run of the SWV_SB_SS_REScheduler script. Subscriptions that were processed for rating will also be processed for next billing amount calculation.
5. Click **Save**.

Generating Invoices for Fixed Date Subscriptions

Unlike an anniversary subscription's bill run that runs automatically on the subscriptions anniversary date, you can generate invoices for fixed date subscriptions through the following options:

- Manually Starting a Bill Run for Fixed Date Subscriptions
- Running a Scheduled Bill Run for Fixed Date Subscriptions
- Generating Pro Forma Invoices

Manually Starting a Bill Run for Fixed Date Subscriptions

You can manually start a bill run for a fixed date subscription in the Subscription Billing Operations Center.

To manually start a bill run for fixed date subscriptions:

1. Go to Subscription Billing > Billing Operations Center > BOC Console.
2. Under Bill Run Settings, enter a billing run name in the **Run Name** field.
3. Check the **Email on bill run finish** box. Enter an email address in the field next to this option if you want the billing system to send an email notification with the results of each bill run. The email address that you entered from the last manual bill run appears in the field. Edit the field if you want to send the notification to a new email address.
4. Click **Run Billing**.
5. Click **OK** when you are prompted to continue with the fixed date subscription processing.

   The Bill Run Status changes to Active. The billing module retrieves fixed date subscriptions that are due for billing and generates invoices from the subscription records. For more information, see Invoicing Process.

   If the fixed date bill run status is active, the billing module regularly checks for fixed date subscriptions that are due for billing. Click **Stop Billing** to cancel a fixed date bill run. Canceling a fixed date bill run does not reverse previously processed subscriptions. You can also pause the fixed date bill run status by clicking **Pause Billing**.

   The following bill run statistics are updated after every fixed date bill run:

   - Start Time
   - End Time
   - Elapsed
   - Last Bill Run
   - Customers
   - Invoices
   - Revenue

> **Note:** You can also manually start the billing engine scheduler script SWV_SB_SS_BEScheduler. Go to Customization > Scripting > Scripts, view the BEScheduler script, and click **Deploy Script**. Change the title of the script deployment and set the status to **Not Scheduled**. Save and execute.

You can also view the statistics of previous bill runs by selecting the bill run name in the Select Bill Run field. Statistics of previous bills runs appear in the fields under the Select Bill Run field (Customers, Invoices, Revenue).

> **Note:** Charges set to On Hold at the start of the invoicing process will be ignored by the billing engine.

Running a Scheduled Bill Run for Fixed Date Subscriptions

You can set up a fixed date bill run to start on a specific date and time in the Subscription Billing Operations Center.

To run a scheduled fixed date bill run:

1. Go to Subscription Billing > Billing Operations Center > BOC Console.
2. Under Bill Run Settings, enter a billing run name in the **Run Name** field.
3. Check the **Email on bill run finish** box. Enter an email address in the field next to this option if you want the billing system to send an email notification with the results of each bill run. The

email address that you entered from the last manual bill run appears in the field. Edit the field if you want to send the notification to a new email address.

4. Check the **Scheduled** box.
5. In the **Start Date** field, select the date when you want the fixed date bill run to start.
6. In the **Start Time** field, select the time when you want the fixed date bill run to start.
7. In the **Time Zone** field, select a time zone. The time zone determines the exact time when the fixed date bill run will start.
8. Click **Run Billing**.
9. Click **OK** when you are prompted to continue with the fixed date subscription processing.

   The Bill Run Status changes to Active. The billing module retrieves fixed date subscriptions that are due for billing on the specified date and time.

   If the fixed date bill run status is active, the billing module regularly checks for fixed date subscriptions that are due for billing. Click **Stop Billing** to cancel a fixed date bill run. Canceling a fixed date bill run does not reverse previously processed subscriptions. You can also pause the fixed date bill run status by clicking **Pause Billing**.

   The following bill run statistics are updated after every fixed date bill run:

   - Start Time
   - End Time
   - Elapsed
   - Last Bill Run
   - Customers
   - Invoices
   - Revenue

You can also view the statistics of previous bill runs by selecting the bill run name in the Select Bill Run field. Statistics of previous bills runs appear in the fields under the Select Bill Run field (Customers, Invoices, Revenue).

> **Note:** Charges set to On Hold at the start of the invoicing process will be ignored by the billing engine.

Generating Pro Forma Invoices

Pro forma invoices are billing statements generated in advance of the actual bill run. You can use the pro forma invoice to check the validity of the invoice charges and items prior to sending the bills to your customers. You can also issue pro forma invoices to customers upon their request.

> **Note:** Pro forma invoices can only be generated for fixed date subscriptions.

You can generate pro forma invoices from the Subscription Billing Operations Center.

To generate pro forma invoices:

1. Go to Subscription Billing > Billing Operations Center > BOC Console.
2. Under Bill Run Settings, check the **Pro Forma** box.
3. Enter a bill date in the **Pro Forma Bill Date** field. You should set this to the next billing date or to any date after the billing cycle end date.
4. In the **Scope** field, select one of the following options:

- **All Customers** – Select this option if you want to generate pro forma invoices for all customers with subscriptions that are due for billing.
- **Generate random list of customers** – Select this option if you want to generate pro forma invoices for a randomly selected number of customers with subscriptions that are due for billing. You need to enter the number of customers that will be selected for pro forma billing in the **Number of customers** field.
- **Use saved search to generate list of customers** – Select this option if you want to generate pro forma invoices for customers that are selected using a pre-defined search criteria. To use this option, you need to define a saved search for customers.

  The following are recommended configurations for creating a saved customer search:

  - Saved customer search title must include the prefix that you specified on the **Global Prefix Saved Search** field (Fixed Date Billing Defaults subtab of the Subscription Billing Preferences page). For more information, see Setting Up Recurring Billing Preferences.
  - Check the **Public** box.
  - Specify the audience under the **Audience** subtab.

  Make sure that the saved customer search returns customer records with subscription transactions. Pro forma uses the saved search to look for subscriptions of customers, and if a saved search does not return any record, no pro forma invoices will be generated.

  When a saved customer search is created, you can select it from the **Saved Search** field. For more information about defining saved searches, see the help topic Defining a Saved Search.

5. Check the **Save Pro forma Settings as default** box to save the values that you selected under the pro forma settings area as the default for succeeding pro forma bill runs.
6. Click **Run Billing**.
7. Click **OK** when you are prompted to continue with the fixed date subscription processing.

   The Bill Run Status changes to Active. The billing module retrieves fixed date subscriptions that are due for billing on the specified date and time.

   If the fixed date bill run status is active, the billing module regularly checks for fixed date subscriptions that are due for billing. Click **Stop Billing** to cancel a fixed date bill run. Canceling a fixed date bill run does not reverse previously processed subscriptions. You can also pause the fixed date bill run status by clicking **Pause Billing**.

   The following bill run statistics are updated after every fixed date bill run:

   - Start Time
   - End Time
   - Elapsed
   - Last Bill Run
   - Customers
   - Invoices
   - Revenue

   > **Note:** You can also manually start the billing engine scheduler script SWV_SB_SS_BEScheduler. Go to Customization > Scripting > Scripts, view the BEScheduler script, and click **Deploy Script**. Change the title of the script deployment and set the status to **Not Scheduled**. Save and execute.

   You can also view the statistics of previous bill runs by selecting the bill run name in the Select Bill Run field. Statistics of previous bill runs appear in the fields under the Select Bill Run field (Customers, Invoices, Revenue).

A pro forma invoice record is created for each subscription that falls within the scope of the option that you selected in the Scope field. You can check the details of the pro forma invoice from the pro forma invoice record. To view the pro forma invoice record, go to Subscription Billing > Billing Operations Center > Pro Forma Invoice and click View next to the pro forma invoice that you want to view. You can also view the generated invoice by opening the subscription record and going to the Transactions > Pro Forma Invoice subtab.

The pro forma invoice record contains most of the same information as an actual invoice including charges for each item on the subscription, applicable taxes, and total invoice amount. The Pro Forma Status field shows the status of the pro forma invoicing process and the results of the process pro forma invoicing generation. If the field shows an Error status, check the Error Info field for more information about troubleshooting the error.

Generating an Invoice for a Specific Customer Subscription

The Recurring Billing SuiteApp lets you generate invoices for a specific customer on demand. This feature can be useful if you want prorated portions of a subscription with an advanced billing method billed prior to the next standard bill run. This feature can also be useful for customers who prefer to generate an invoice after the fixed billing date, in the event that usage data has not been completely imported or that issues have been encountered when a pro forma was generated.

To generate an invoice for a customer subscription:

1. Go to Subscription Billing > View Records > Subscription.
2. On the Subscription list, click **View** next to the subscription record from which you want to generate an invoice.

   > **Note:** You can only generate invoices for a specific subscription that has a next billing date set to the current date or to an earlier date.

3. On the subscription record, click **Run Billing**. An invoice is generated for charges that are due for the subscription.

Important Things to Note About the Run Billing Feature:

- You will be prompted if the charges for the billing period are not yet created when the **Run Billing** button is clicked. To proceed, generate the missing charges by running the REScheduler script (or wait for its scheduled run), then go back to the subscription record and click the **Run Billing** button to generate the invoice.
- The maximum number of secondary subscription items in a subscription that the **Run Billing** button can process is 200 items. You can use the BEScheduler script to bill subscriptions that exceed this limit.
- Billing on demand is not allowed on subscriptions that have a change order (other than renewal) in Pending, In Progress, or Awaiting User Action status.
- For newly created subscriptions, the **Run Billing** button will be available only after all billable charges up to the current date have been created for the subscription items.

Pre-Billing

During normal bill runs, the Recurring Billing SuiteApp generates invoices for subscriptions with a next billing date that is equal to or earlier than the current date.

Pre-Billing enables you to generate advance invoices for subscriptions even if they are not yet due for billing (that is, next billing date is set to a future date). The advance billing date determines the date when you can execute invoice creation for the subscription’s nearest unbilled period (next item billing date).

For information about the permissions required to use this feature, see Required Permissions for Billing-Related Operations.

Before you can generate an advance invoice for a subscription, the following conditions must be met:

- An advance billing date must be set for the subscription
- The advance billing date must be equal to the current date

> **Note:** You can set the advance billing date to a future date but you can generate the invoice only when that date comes.

> **Important:** When applying subscription change orders in conjunction with pre-billing, remember that change orders cannot be backdated under normal circumstances (unless the Backdated Change Order preference is enabled). Change orders are validated against the current date, and when you perform pre-billing, you are essentially simulating the current date to be equal to the next billing date. For pre-billed subscriptions, you cannot apply a change order that is backdated relative to the last billing date.
>
> For example, if the current date is March 3, 2014 and you generate an advance invoice for a subscription with a next billing date of April 1, 2014—after you generate the invoice, the value of the subscription’s Last Billing Date field changes to April 1, 2014. You will not be able to apply change orders with an execution date set from March 3, 2014 through March 31, 2014 because they are considered backdated relative to the last billing date.

To set the advance billing date, see Setting the Advance Billing Date.

To generate an advance invoice, see Generating an Advance Invoice.

Setting the Advance Billing Date

Advance billing date is the execution date for advance invoice creation. When the advance billing date matches the current date, you can generate an advance invoice for the subscription’s nearest unbilled period (next item billing date).

Advance Billing Date is a hidden field on the subscription record that you can set using mass update or scripts.

To set the advance billing date using mass update:

1. Go to Lists > Mass Update > Mass Updates.
2. Click **General Updates** and select **Subscription** under Custom Records.
3. Enter a title for the mass update action.
4. On the **Criteria** subtab, set the criteria for the subscriptions that you want to update. If no criteria is specified, all subscriptions will be included in the update.
5. On the **Mass Update Fields** subtab, check the **Advance Billing Date** box and specify a date.

> **Note:** You can set the advance billing date only to the current date or to any future date.
>
> If you specify a past date as an advance billing date, the mass update will still update the subscriptions and set the specified date as the advance billing date. However, you will not be able to generate the invoice because the Pre-Billing feature generates invoices only when the advance billing date matches the current date.

6. Click **Preview** to see which subscriptions will be included in the mass update based on the criteria that you set. You can choose which of these subscriptions will be updated by checking the corresponding box in the **Apply** column.
7. Click **Perform Update** to execute the mass update.

> **Note:** To verify if an advance billing date has been set for a subscription, customize your Subscription List page to show the **Advance Billing Date** field.

For information about generating advance invoices, see Generating an Advance Invoice.

Generating an Advance Invoice

You can generate an advance invoice for a subscription only when the advance billing date matches the current date.

Pre-Billing supports advance invoice creation for a single subscription and for multiple subscriptions. You can generate advance invoices for multiple subscriptions using mass update, or by running the SWV_SB_SS_BEScheduler script manually or through the Script Runner portlet.

- Generating an Advance Invoice for a Single Subscription
- Generating an Advance Invoice for Multiple Subscriptions

> **Note:** Pre-Billing is not allowed on subscriptions that have a change order (other than renewal) in Pending, In Progress, or Awaiting User Action status.

> **Note:** When you pre-bill a subscription with a subscription item that is pending termination, the status of the subscription item will change from Pending Termination to Terminated if its termination date falls within the period that you are creating an advance invoice for.

Generating an Advance Invoice for a Single Subscription

You can generate an advance invoice for a single subscription by clicking the **Run Pre-Billing** button on the subscription record. This button is available on subscription records only if the subscription has an advance billing date that matches the current date. For information about setting an advance billing date for the subscription, see Setting the Advance Billing Date.

To generate an advance invoice for a single subscription:

1. Go to Subscription Billing > View Records > Subscription.
2. On the Subscription List page, view the subscription that you want to create an advance invoice for.
3. On the subscription record, click the **Run Pre-Billing** button to generate an invoice for the subscription. The system sees the next billing date and generates the invoice for that billing period. After an advance invoice has been generated for a subscription, the value for the **Advance Billing Date** field is removed.

The **Run Pre-Billing** button is available on the subscription record only when the advance billing date matches the current date. This button is not available if the advance billing date is a past date or a future date.

> **Note:** If there is a credit memo to be generated, you must click the **Run Pre-Billing** button two times to generate both the credit memo and the invoice for the billing period. When you click the **Run Pre-Billing** button for the first time, only the credit memo is generated and the value for the **Advance Billing Date** field is retained. When you click the **Run Pre-Billing** button for the second time, the advance invoice is generated and the value for the **Advance Billing Date** field is removed.

Generating an Advance Invoice for Multiple Subscriptions

You can generate advance invoices for multiple subscriptions using mass update, or by running the SWV_SB_SS_BEScheduler script manually or through the Script Runner portlet.

For mass update, the maximum number of subscription items that can be pre-billed is 200. You should use the BEScheduler script to process subscriptions that exceed this limit. The BEScheduler script, whether executed manually or through the Script Runner portlet, can also process subscriptions in multiple deployment queues. Therefore, if you have a SuiteCloud Plus license, these options can provide better performance when processing multiple subscriptions for pre-billing.

To generate advance invoices using the Script Runner portlet or BEScheduler script, you need to enable the pre-billing preference on the Subscription Billing Preferences page. The **Enable Pre-Billing** preference is not automatically available in your account. Perform the following steps if you want to show and enable this preference.

To show and enable the Pre-Billing preference:

1. Go to Customization > Scripting > Scripts.
2. Click the **Deployments** link for the **SWV_SB_SS_CreatePreBillingPref** (customscript_swv_sb_ss_prebillingpref) script.
3. Edit the deployment record.
4. Click **Save and Execute** in the Save dropdown menu.

   The script adds and automatically checks the **Enable Pre-Billing** box on the Subscription Billing Preferences page. To verify if the preference has been added and enabled, go to Subscription Billing > Account Setup > Subscription Billing Preferences. The **Enable Pre-Billing** box is located on the **General Billing Defaults** subtab. For more information, see Setting Up Recurring Billing Preferences.

Read the following topics for information about generating advance invoices for multiple subscriptions:

- Using the Script Runner Portlet to Generate Advance Invoices
- Running the BEScheduler Script to Generate Advanced Invoices
- Performing Mass Update to Generate Advance Invoices

Using the Script Runner Portlet to Generate Advance Invoices

For information on how to set up the Script Runner portlet, see Setting Up the Subscription Billing Dashboard.

To generate advance invoices for multiple subscriptions using the Script Runner portlet:

1. Click the **Subscription Billing** tab to go to the Subscription Billing Dashboard.

2. On the Script Runner portlet:
    1. In the **Process Type** field, select **Billing**.
    2. In the **Script Type** field, select **Scheduler**.
    3. Check the **Pre-Billing** box. This field is available only if you checked the **Enable Pre-Billing** box on the Subscription Billing Preferences page. For more information, see Setting Up Recurring Billing Preferences.
    4. If you want the scheduler script to generate an advance invoice for specific subscriptions only, select the ID of the subscriptions in the **Subscription ID** field. This field is filtered to show only subscriptions with an advance billing date that matches the current date. If you did not select any subscription in this field, the scheduler script will process all subscriptions in the list.

        For information about setting the advance billing date, see Setting the Advance Billing Date.
    5. Click **Run Script**. The scheduler script runs and generates invoices for the subscriptions set in the previous step. After an advance invoice has been generated for a subscription, the value in the **Advance Billing Date** field is removed.

Running the BEScheduler Script to Generate Advanced Invoices

To generate advance invoices for multiple subscriptions using the BEScheduler script:

1. Go to Customization > Scripting > Scripts.
2. Click the **Deployments** link for the **SWV_SB_SS_BEScheduler** script.
3. Edit the **customdeploy_sb_be_scheduler** (SWV_SB_SS_BEScheduler) deployment record.
4. If you want the script to process specific subscriptions only, go to the **Parameters** subtab. Specify the internal IDs of the subscriptions that you want to generate an advance invoice for in the **Subscription IDs** field. Use commas to separate multiple subscription IDs. If you leave this field blank, the script will process all subscriptions that have an advance billing date that matches the current date.

    For information about setting the advance billing date, see Setting the Advance Billing Date.
5. Check the **Pre-Billing** box on the **Parameters** subtab. This field is available only if you checked the **Enable Pre-Billing** box on the Subscription Billing Preferences page. For more information, see Setting Up Recurring Billing Preferences.
6. Click **Save and Execute** in the Save button dropdown menu. The script runs and generates invoices for the subscriptions set in Step 4. After an advance invoice has been generated for a subscription, the value in the **Advance Billing Date** field is removed.

Performing Mass Update to Generate Advance Invoices

When you use mass update to pre-bill multiple subscriptions, note that the maximum number of subscription items that can be processed is 200. If you are processing subscriptions that exceed this limit, you should use the Script Runner portlet or the BEScheduler script for pre-billing. For more information, see Using the Script Runner Portlet to Generate Advance Invoices and Running the BEScheduler Script to Generate Advanced Invoices.

To generate advance invoices for multiple subscriptions using mass update:

1. Go to Lists > Mass Update > Mass Updates.
2. Click **Workflows** and look for Process Run Billing. Click **Process Run Billing** to open the mass update form.

3. Enter a title for the mass update action.
4. In the **Button** field, select **Active : Run Pre-Billing**.
5. On the **Criteria** subtab, set the criteria for the subscriptions that you want to create an advance invoice for. If no criteria is specified, all subscriptions that have an advance billing date will be included in the update. However, advance invoices will be generated only for subscriptions that have an advance billing date that matches the current date.

   > **Important:** The mass update might terminate if it encounters one or more records with a backdated advance billing date. For this reason, you should add a criteria to filter the subscriptions based on the advance billing date.

   For information about setting the advance billing date, see Setting the Advance Billing Date.
6. Enter values on the **Results**, **Audience**, and **Schedule** subtabs as you would in a standard mass update. For more information, see the help topic Defining a Mass Update.
7. Click **Preview** to see which subscriptions will be included in the mass update based on the criteria that you set. You can select which of these subscriptions will be updated by checking the corresponding box in the **Apply** column.
8. Click **Perform Update** to execute the mass update. An invoice will be generated for all subscriptions that are included in the mass update and that have an advance billing date that matches the current date. After an advance invoice has been generated for a subscription, the value for the **Advance Billing Date** field is removed.

Pre-Billing for Variable Usage Items

Variable usage is a usage type wherein the usage amounts vary per billing period. Because variable charges are hard to predict, subscriptions with variable usage items are typically billed at the end of a billing cycle (Arrears).

You can pre-bill subscriptions with variable usage items if there are available charges that can be picked up by the billing engine. However, only existing charges on the day of the advance billing date will be included in the advance invoice.

Example:

A subscription with variable usage items has a next billing date of March 1, 2014 and this covers the billing period from February 1 through 28. If you perform pre-billing on February 15, 2014, only the amount of variable usage charges from February 1 through 15 will be included in the advance invoice for March 1, 2014.

If there are additional variable charges incurred from February 16 through 28, it will be left hanging because the current period has been pre-billed and the next billing date is now April 1, 2014 (and this covers the billing period from March 1 through 31). As a workaround, you can set the service dates of the usage from February 16 through 28 to any date within the next billing period so that the charges will be included in the next billing.

How an Advance Invoice is Generated for a Subscription

The following example shows how an advance invoice is generated for a subscription with a monthly billing frequency and advanced billing method.

The table shows the subscription billing period, scheduled billing dates, and the date when the subscription was billed. The last column shows how an advance invoice will be generated for the subscription when an advance billing date is set.

> **Note:** In this example, the advance billing date is set using mass update. For information on how to set the advance billing date, see Setting the Advance Billing Date.
>
> You can manually generate an advance invoice for a single subscription by clicking the **Run Pre-Billing** button on the subscription record. You can also generate advance invoices for multiple subscriptions using mass update or by running the BEScheduler script (manually or through the Script Runner portlet). For information on how to generate advance invoices, see Generating an Advance Invoice.

Billing Period	Billing Date	Date Billed	How an Advance Invoice is Generated
1/1/2014 - 1/31/2014	1/1/2014	1/1/2014	Normal invoicing. ■ Last Billing Date: 1/1/2014 ■ Next Billing Date: 2/1/2014
2/1/2014 - 2/28/2014	2/1/2014	2/1/2014	Normal invoicing. ■ Last Billing Date: 2/1/2014 ■ Next Billing Date: 3/1/2014
3/1/2014 - 3/31/2014	3/1/2014	3/1/2014	Normal invoicing. ■ Last Billing Date: 3/1/2014 ■ Next Billing Date: 4/1/2014
4/1/2014 - 4/30/2014	4/1/2014	4/1/2014	Normal invoicing. ■ Last Billing Date: 4/1/2014 ■ Next Billing Date: 5/1/2014
			On 4/15/2014: ■ Advance billing date is set to **4/15/2014** (current date). ■ Advance invoice for the next billing date, 5/1/2014, is generated (manually or by mass update). ■ When the invoice has been generated, the following fields will be updated: □ Advance Billing Date: (cleared) □ Last Billing Date: 5/1/2014 □ Next Billing Date: 6/1/2014
5/1/2014 - 5/31/2014	5/1/2014	4/15/2014 (advance invoice generated)	
6/1/2014 - 6/30/2014	6/1/2014	6/1/2014	Normal invoicing. ■ Last Billing Date: 6/1/2014 ■ Next Billing Date: 7/1/2014
			On 6/15/2014: ■ Advance billing date is set to **7/15/2014** (future date). ■ The value for the advance billing date is saved on the subscription record. The advance invoice can only be generated on 7/15/2014.
			On 6/18/2014:

Billing Period	Billing Date	Date Billed	How an Advance Invoice is Generated
			▪ Advance billing date is set to **6/30/2014** (future date). ▪ This action replaces the earlier value set for advance billing date. Advance billing date is now 6/30/2014 and the advance invoice can only be generated on that date.
			On 6/30/2014: ▪ The saved value for advance billing date now matches current date, **6/30/2014**. ▪ Advance invoice for the next billing date, 7/1/2014, is generated (manually or by mass update). ▪ When the invoice has been generated, the following fields will be updated: ▫ Advance Billing Date: (cleared) ▫ Last Billing Date: 7/1/2014 ▫ Next Billing Date: 8/1/2014
7/1/2014 - 7/31/2014	7/1/2014	6/30/2014 (advance invoice generated)	On 7/20/2014: ▪ Advance billing date is set to **7/20/2014** (current date). ▪ Advance invoice for the next billing date, 8/1/2014, is generated (manually or by mass update). ▪ When the invoice has been generated, the following fields will be updated: ▫ Advance Billing Date: (cleared) ▫ Last Billing Date: 8/1/2014 ▫ Next Billing Date: 9/1/2014
			On the same day, 7/20/2014: ▪ Advance billing date is set again to **7/20/2014** (current date). ▪ Because an invoice has already been generated for 8/1/2014, the next billing date is now 9/1/2014. Hence, an advance invoice for 9/1/2014 will be generated this time. ▪ When the invoice has been generated, the following fields will be updated: ▫ Advance Billing Date: (cleared) ▫ Last Billing Date: 9/1/2014 ▫ Next Billing Date: 10/1/2014
8/1/2014 - 8/31/2014	8/1/2014	7/20/2014 (advance invoice generated)	
9/1/2014 - 9/30/2014	9/1/2014	7/20/2014 (advance invoice generated)	
10/1/2014 - 10/31/2014	10/1/2014	10/1/2014	Normal invoicing. ▪ Last Billing Date: 10/1/2014 ▪ Next Billing Date: 11/1/2014
11/1/2014 - 11/30/2014	11/1/2014	11/1/2014	Normal invoicing. ▪ Last Billing Date: 11/1/2014

Billing Period	Billing Date	Date Billed	How an Advance Invoice is Generated
			■ Next Billing Date: 12/1/2014
12/1/2014 - 12/31/2014	12/1/2014	12/1/2014	Normal invoicing. ■ Last Billing Date: 12/1/2014 ■ Next Billing Date: 1/1/2015

Rolling Back the Subscription Bill Dates

The Recurring Billing SuiteApp lets you rollback the bill dates of subscriptions that you want to redo billing for.

You can perform bill date rollback by mass update or by clicking the **Rollback Bill Date** button on the subscription record.

Permissions

Only Recurring Billing roles with a **Bill On Demand** custom permission can perform bill date rollback. For more information, see Roles and Permissions for Recurring Billing.

Prerequisites/Conditions

Before performing bill date rollback, you must first delete the previous period's billing transactions (invoice, cash sale, or credit memo).

The **Rollback Bill Date** button is available on subscription records that satisfy the following conditions. For bill date rollback by mass update, the subscriptions must also be filtered based on the following criteria to ensure that all subscriptions in the list are processed.

- Subscription is active.
- Subscription status is Open.
- The subscription's Last Billed Date field is not empty (that is, the subscription has been billed at least one time).

Other conditions for a successful bill date rollback:

- None of the subscription items in the subscription has completed change orders or mid-period adjustments for the previous period.
  - Bill date rollback is NOT allowed if any of the following change orders has been completed in the previous period (that is, the effective date of the change order is either equal to the period start date, in between the period start and end dates, or equal to the period end date):
    - Extend Subscription Item End Date
    - Migrate Subscription Plan
    - Modify Quantity for Fixed Usage
    - Reactivate Subscription Item
    - Renew Subscription Item
    - Suspend Subscription Item

    - Terminate Subscription Item
  - If a Modify Subscription Item Rate change order has been applied, bill date rollback is NOT allowed if any of the following conditions is true:
    - The adjustment start date is later than the period start date, and earlier than or equal to the period end date
    - The adjustment end date is equal to or later than the period start date, and earlier than the period end date
  - Bill date rollback is allowed even if any of the following change orders has been completed in the previous period:
    - Add One Time Charge
    - Add Subscription Item
    - Modify Subscription Start Date
- None of the subscription items in the subscription has been closed, migrated, or terminated in the previous period.

To rollback the bill date from the subscription record:

1. Go to Subscription Billing > Subscription.
2. Select the subscription that you want to rollback the bill date for.
3. On the subscription record, click the **Rollback Bill Date** button.

To rollback the bill date by mass update:

> **Note:** Bill date rollback by mass update is tested and recommended for up to 200 subscriptions only.

1. Go to Lists > Mass Update > Mass Updates.
2. Click **Custom Updates** to expand.
3. Click **SWV_SB_MU_Rollback_Nbd**.
4. On the **Criteria** subtab, set the values for the following filters:
   - Inactive = No
   - Status = Open
   - Last Billed Date Time = not empty
5. Click **Preview** to select which subscriptions will be included in the bill date rollback.
6. On the Mass Update Preview Results page, check the box for the subscriptions that you want to rollback the bill dates for. Make sure that the subscriptions you selected are valid for bill date rollback. For more information, see Prerequisites/Conditions.
7. Click **Perform Update** to execute the mass update. The mass update action will process all subscriptions that are valid for bill date rollback.

   If the mass update encounters a subscription that is not valid for bill date rollback, it will return an error and stop processing the remaining items on the list. Only the updates that were completed prior to the error will be applied.

Upon successful completion of the bill date rollback, the following records will be updated:

- The subscription’s Last Billed Date and Next Billing Date fields will be rolled back by one bill date.

- The subscription item's Last Item Billing Date and Next Item Billing Date fields will be rolled back by one period.
- Non-billable charges with zero amount for the previous period will have its charge stage set back to Ready.

Subscription Invoice

A subscription invoice record is created for each subscription that has been processed for billing. Each invoice consists of multiple line items whose sales amount adds up to the total of the invoice.

The Recurring Billing SuiteApp enhances the NetSuite invoice record to include the following fields for recording subscriptions sales transactions.

Fields	Description
Subscription ID	This field displays the system generated ID of the subscription from which the invoice was generated. For more information, see Subscriptions.
Time Zone	This field displays the customer's time zone. The time zone determines the exact time when the subscription is issued an invoice. **Note:** For version 2.02 of the Recurring Billing SuiteApp, time zone conversion is done using: (1) Client time zone = Company Information time zone, (2) Server Date time zone. Changing time zones can affect the existing subscription dates.
Server Date Time	This field displays the system date and time when the invoice was created.
Client Time	This field displays the customer time zone-adjusted time when the invoice was created.

Important Things to Note:

- The Start Date field in the subscription invoice header takes the value of the earliest line item start date. The End Date field in the subscription invoice header takes the value of the latest line item end date.
- The location in subscription invoices depends on the subscription location, not on the value on the sales order.
- If the subscription item on the invoice is associated with a revenue recognition template, the Rev Rec Start Date and Rev Rec End Date follows the subscription charge start and end dates.

You can manage subscription invoices the same way as a standard NetSuite invoice. The following topics describe some invoice management features in NetSuite:

- Printing an Invoice
- Giving Customers Access to Invoices
- Billing and Invoices

For more information, see the help topic Invoices.

Rating Details on a Subscription Invoice

If the Show Tier Breakdown box is checked on the rate plan that is referenced by the item being invoiced, usage unit details are shown in the Rating Details field of the invoice line and charge record.

Usage unit details may include values for actual usage, included usage, sibling usage, and historical usage. The Rating Details field also displays the usage tiers applicable to the total assessed usage. Total usage is computed based on the rating model selected for the rate plan that the item references:

Rating Model	Total Usage
Volume Pricing	Actual Usage + Sibling Usage + Historical Usage - Included Usage
Tiered Pricing	Usage consumed in the tier

The Rating Details field also displays the assessed charges for each tier. The charge for each usage tier is computed based on the rating model selected for the rate plan that the item references and on the pricing option for the usage tier:

Rating Model	Pricing Option	Charge per Tier
Volume Pricing	Rate	(Actual Usage - Included Usage) x (Rate of the Tier)
	Price	Rate of the Tier
Tiered Pricing	Rate	(Usage consumed in that tier) x (Rate of the Tier)
	Price	Rate of the Tier

If you specified tier thresholds (Min Price and Max Price) for usage tiers with a rate pricing option, the charge for the tier is determined by the minimum or maximum price values if the charge falls outside the threshold amounts.

The total invoice amount is the sum of all tier charges for that item. If you specified charge thresholds (Minimum Charge and Maximum Charge) for the rate plan, the total invoice amount is determined by the minimum or maximum charge values set if the sum of all tier charges falls outside of those threshold amounts.

Examples

The following examples show information that may be included in the Rating Details field of invoices for an item using a Volume Pricing rating model with a Rate pricing option (Example 1) and for an item using a Tiered Pricing rating model with a Price pricing option (Example 2).

The items have a total actual usage of **701** units for the current billing period, an included usage of **100** units, and a total historical usage of **225** units. A minimum charge of **1** and a maximum charge of **50** are set for the rate plan charge threshold.

Example 1: Rating Model = Volume Pricing

The following table shows the usage tiers for the item.

Tier Name	Tier	Rate	Pricing Option
A	0 – 200	0.55	Rate
B	201 – 400	0.45	Rate
C	401 – 600	0.35	Rate
D	601 – 800	0.25	Rate
E	801 and above	0.15	Rate

The following table shows the information that will appear in the Rating Details field of the invoice for the item.

Rating Details	Invoice Amount
Tier: 801– Usage: 826 Rate: 0.15 Min: N/A Max: N/A Charge: 601*0.15 = 90.15 Total Actual Usage: 701 Included Usage: 100 Sibling Usage: N/A Historical Usage: 225 Min Charge: 1 Max Charge: 50	50

For this example, to get the total usage:

- Total Usage = Actual Usage + Sibling Usage + Historical Usage - Included Usage = 701 + 0 + 225 - 100 = 826

For volume pricing rating model, locate the tier where the total usage falls and use the corresponding rate to calculate the charge. Total usage of 826 falls under Tier E (801 and above). Therefore, the actual usage of 701 (minus an included usage of 100) will be rated in Tier E with a rate of 0.15.

For rate pricing option, charge amount for the tier is computed by multiplying the rate and usage.

- Charge = (Actual Usage - Included Usage)*(Rate of the Tier) = (701 - 100)*(0.15) = 90.15

If a tier threshold is specified, the computed charge amount will be compared against the Min Price and Max Price values of the tier. If the charge is lower than the Min Price, the tier charge will automatically be set to the Min Price value. If the tier charge is higher than the Max Price, the tier charge will automatically be set to the Max Price value. For this example, since there is no tier threshold values, the tier charge will remain 90.15.

The charge amount will then be compared against the charge threshold (Minimum Charge and Maximum Charge), if specified. For this example, a minimum charge of 1 and a maximum charge of 50 has been set. Because the computed tier charge amount of 90.15 is greater than the maximum charge, the invoice amount is automatically set to 50.

Example 2: Rating Model = Tiered Pricing

The following table shows the usage tiers for the item.

Tier Name	Tier	Rate	Pricing Option
A	0 – 200	0.55	Price
B	201 – 400	0.45	Price
C	401 – 600	0.35	Price
D	601 – 800	0.25	Price
E	801 and above	0.15	Price

The following table shows the information that will appear in the Rating Details field of the invoice for the item.

Rating Details	Invoice Amount
Tier: 201 – 400 Usage: 175 Rate: 0.45 Min: N/A Max: N/A Charge: 0.45	1.2

Rating Details	Invoice Amount
Tier: 401 – 600 Usage: 200 Rate: 0.35 Min: N/A Max: N/A Charge: 0.35 Tier: 601 – 800 Usage: 200 Rate: 0.25 Min: N/A Max: N/A Charge: 0.25 Tier: 801 – Usage: 26 Rate: 0.15 Min: N/A Max: N/A Charge: 0.15 Total Actual Usage: 701 Included Usage: 100 Sibling Usage: N/A Historical Usage: 225 Min Charge: 1 Max Charge: 50	

For tiered pricing rating model, usage is distributed or consumed per tier. The rule is to consume the historical usage before distributing the actual usage (minus the included usage).

For this example, there are 200 units to consume per tier. The following table shows how usage is distributed to the tiers.

- Historical Usage = 225
- Actual Usage - Included Usage = 701 - 100 = 601

Tier	Units per Tier	Usage Consumed per Tier	Charge per Tier
0 - 200	200	200 (from historical usage)	0 (no charge for historical usage)
201 - 400	200	25 (from historical usage) + 175 (from actual usage)	0.45
401 - 600	200	200 (from actual usage)	0.35
601 - 800	200	200 (from actual usage)	0.25
801 and above	200	26 (from actual usage)	0.15

Note that since the pricing option for all tiers is price, the rate specified is the actual charge for the tier. Also, tier threshold (Min Price and Max Price) is not applicable to this pricing option. To get the total charge amount, add the charges for all tiers where actual usage is consumed.

- Charge = 0.45 + 0.35 + 0.25 + 0.15 = 1.2

The total charge amount will then be compared against the charge threshold (Minimum Charge and Maximum Charge), if specified. For this example, a minimum charge of 1 and a maximum charge of 50 has been set. Because the computed charge amount of 1.2 falls inside the threshold range, the invoice amount is 1.2.

For more information about displaying tier breakdown details, see Creating a Rate Plan. The invoice amount specifies the total charges due to be paid to you by the customer.

Recurring Billing KPIs and Reports

The Recurring Billing SuiteApp includes several packaged Key Performance Indicators (KPIs) that synthesize your subscription business data into critical business metrics that you can view on your dashboard and on subscription and subscription item records. The SuiteApp also includes reporting capabilities that enable you to retrieve and present real-time subscription business results.

View the following topics for more information on Recurring Billing KPIs and reports:

- Displaying Recurring Billing KPI and Saved Searches Results on the Dashboard
- Subscription and Subscription Item KPIs
- Generating Billing Forecast Reports

Displaying Recurring Billing KPI and Saved Searches Results on the Dashboard

The Recurring Billing SuiteApp enables you to generate revenue, usage, and customer metrics and display them as Key Performance Indicators (KPIs) on your dashboard and on subscription and subscription item records.

The SuiteApp comes with the following custom saved searches that you can configure and show on the dashboard as KPIs:

> **Note:** Displayed values are based on calendar months.

- **Active Subscriptions** – This saved search returns the number of active subscriptions within a specified period.
- **Monthly Recurring Revenue** (MRR) – This saved search returns the aggregate amount of recurring service and fixed usage fees for the current month. This value does not include variable usage and termination fees.
- **Total Contract Value** (TCV) – This saved search returns the total value of recurring service and fixed usage fees from all active subscription items with respect to the term of the current month. The TCV changes when the term is updated on renewal.
- **Annual Contract Value** (ACV) – This saved search returns the annualized value of the current month's MRR.
- **Direct New Business - MRR** – This saved search returns the total amount of recurring service and fixed usage fees from new subscriptions and subscription items for the current month.
- **Direct new Business - ACV** – This saved search returns the annualized value of the current month's Direct New Business - MRR.
- **Customer Churn** – This saved search returns the total number of customers with subscriptions lost due to terminations and non-renewals for the current year.
- **Revenue Churn** – This saved search returns the annualized value of subscription revenue lost for the specified period due to any of the following:
  - Terminations
  - Non-renewals
  - Decrease in quantity of subscription items
  - Decrease in revenue due to change in rate or price, discount, and uplift
  - Extension of term upon reactivation

  Revenue churn does not include revenue lost due to migration of the subscription to a new plan.

> **Note:** Displayed amounts on the KPIs are in the base currency set for the account. The saved searches does not include values in other currencies.

For information on configuring KPIs and displaying KPI results on portlets, see the help topic Adding a Custom KPI to the Key Performance Indicators Portlet.

For more information on custom KPIs, see the help topic Key Performance Indicators Overview.

You can use the following saved searches to display revenue metrics in custom search portlets on the dashboard:

- **Subscription Amounts** – This saved search returns the monthly recurring revenue, annual contract value, and total contract value of subscription items. You can filter the search to show only items associated with a particular subscription.
- **Subscription Transaction Revenue** – This saved search returns the invoices, cash sales, and credit memos billed to a particular customer and displays the revenue amount for that invoice. You can filter the search by subscription ID. For more information, see the help topic Displaying Saved Search Results on Your Dashboard.

You can also use the KPI saved searches that come with the bundle to illustrate revenue trends on a Trend Graph. For more information, see the help topic Displaying Custom KPI Results in Trend Graphs.

Subscription and Subscription Item KPIs

The Analytics subtab on the subscription and subscription item records shows KPI results that are specific to the subscription or subscription item. The following saved searches extract data from the subscription or subscription items and generate the KPI results shown on their corresponding Analytics subtab.

- Under the **Recurring Rev (Subscription)** and **Recurring Rev (Calendar)** subtabs:
  - **Monthly Recurring Revenue** (MRR) – This saved search returns the total amount of recurring service and fixed usage fees from the subscription or subscription item per month. The results include MRRs for the current month, the last three months, and the next three months. On the subscription item record KPIs, you can view the list of MRRs for each month starting from the current month up to the rolling year.
  - **Annual Contract Value** (ACV) – This saved search returns the annualized value of the current month's MRR for the subscription or subscription item.
  - **Total Contract Value** (TCV) – This saved search returns the total value of recurring service and fixed usage fees for the subscription or subscription item from the start of the subscription until the end of the current term.

  Recurring Rev (Calendar) displays the KPI results based on calendar months. Date ranges are fixed and follow the usual calendar format.

  Recurring Rev (Subscription) displays the KPI results based on subscription months. Date ranges depend on the bill cycle end and billing mode of the subscription.

  The following table shows sample date ranges based on subscription months for an anniversary subscription with a start date of January 15, 2014. Bill cycle end is every 14th of the month (subscription start date minus one day).

Month	Period Start Date	Period End Date
January	January 15, 2014	February 14, 2014
February	February 15, 2014	March 14, 2014
March	March 15, 2014	April 14, 2014

  The following table shows sample date ranges based on subscription months for a fixed date subscription with a start date of January 20, 2014 and fixed billing date of February 10, 2014. Bill cycle end is every 9th of the month (fixed billing date minus one day).

Month	Period Start Date	Period End Date
January	January 20, 2014	February 9, 2014
February	February 10, 2014	March 9, 2014
March	March 10, 2014	April 9, 2014

- Under the **Usage** subtab:
  - **Usage** – This saved search displays the total quantity and amount of variable usage grouped by usage units for the subscription or subscription item for the current month.

> **Note:** There may be minor differences between the values in the subscription KPIs for subscriptions with pending migration change orders and the values in the forecast reports due to the current limitation when mapping old subscription plans with new subscription plans during plan migration.
>
> Values in the subscription KPIs may differ from the actual values for subscriptions with pending custom pricing change order.

Generating Billing Forecast Reports

> **Note:** The Advanced PDF/HTML Templates feature must be enabled to generate the billing forecast report. To enable this feature, go to the Enable Features page (Setup > Company > Enable Features) and check the **Advanced PDF/HTML Templates** box on the **SuiteCloud** subtab. For more information, see the help topic Enabling Features.

You can generate the following type of reports from the Billing Forecast form.

> **Note:** Displayed values are based on calendar months. The report follows the number format set in the user preferences. However, these number formats are not supported in the report: 1#000#000.00 and 1#000#000,00.

- **Monthly Recurring Revenue** (MRR) – This report displays the total amount of recurring service and fixed usage fees for the current month.
- **Annual Contract Value** (ACV) – This report displays the total amount of recurring service and fixed usage fees for the current year.
- **New Business** – This report displays the total amount of new recurring service and fixed usage fees within the period specified in the Report Frequency field.
- **Upsell** – This report displays the revenue gained due to any of the following:
  - Increase in quantity of subscriptions items
  - Increase in revenue due to change in rate or price, discount, and uplift
  - Extension of term upon reactivation
- **Downsell** – This report displays the revenue lost due to any of the following:
  - Terminations
  - Non-renewals
  - Decrease in quantity of subscription items
  - Decrease in revenue due to change in rate or price, discount, and uplift
  - Extension of term upon reactivation

Note: There may be minor differences between the values in the subscription KPIs for subscriptions with pending migration change orders and the values in the forecast reports due to the current limitation when mapping old subscription plans with new subscription plans during plan migration.

Values in the forecast reports may differ from the actual values for subscriptions with pending custom pricing change order.

To generate billing forecast reports:

1. Go to Subscription Billing > Billing Forecast > Billing Forecast.
2. Define the primary filters for the report.

Note: If all date filters are blank, the report shows subscriptions with a start date of January 1 to December 31 of the current year.

Field Name	Description
Subscription Start Date	Use this field to filter the report results to show only subscriptions that have a start date equal to or later than a specific date. Use this field in conjunction with the **Subscription Termination Date** field to select the start date of a date range within which to search for a subscription.
Subscription Termination Date	Use this field to filter the report results to show only subscriptions that have a termination date equal to or earlier than a specific date. If you specify a termination date, perpetual subscriptions will not be included in the report. Use this field in conjunction with the **Subscription Start Date** field to select the end date of a date range within which to search for a subscription.
Subscription Analytics From	Use this field to filter the report results to include subscription analytics that have a start date equal to or later than a specific date. Use this field in conjunction with the **Subscription Analytics To** field to select the start date of a date range within which to search for subscription analytics. The maximum date range that you can specify in the **Subscription Analytics From** and **Subscription Analytics To** fields is 10 years. If only the **Subscription Analytics From** date is specified, the report includes values from the specified date up to December 31 of the same year. For example, if the **Subscription Analytics From** date is June 10, 2016, the report shows subscription analytics from June 10, 2016 to December 31, 2016.
Subscription Analytics To	Use this field to filter the report results to include subscription analytics that have a start date equal to or earlier than a specific date. Use this field in conjunction with the **Subscription Analytics From** field to select the end date of a date range within which to search for subscription analytics. The maximum date range that you can specify in the **Subscription Analytics From** and **Subscription Analytics To** fields is 10 years. If only the **Subscription Analytics To** date is specified, the report includes values from January 1 of the same year up to the specified date. For example, if the **Subscription Analytics To** date is March 15, 2015, the report shows subscription analytics from January 1, 2015 to March 15, 2015.
Currency	This field is available only if the Multiple Currencies feature is enabled. Use this field to filter the report results to include only subscriptions in a specific currency. This field is required if you use multiple currencies.
Status	Use this field to filter the report results to include only subscriptions with a certain status.

3. Under Other Filters, you can specify an additional filter for the report. You can select only one of the following filters.

Field Name	Description
Subsidiary	This field is available only in the OneWorld version of NetSuite. Use this field to filter the report results to include only subscriptions of a specific subsidiary. If you leave this field blank, the search results will include subscriptions of all subsidiaries.
Customer	Use this field to filter the report results to include only subscriptions of a specific customer. If you leave this field blank, the search results will include subscriptions of all customers.
Subscription	Use this field to filter the report results to include only the subscriptions specified. This field shows all subscriptions regardless of its status. However, only subscriptions with a status of Pending, Open, Suspended, or Closed must be selected. If you leave this field blank, the search results will include all subscriptions with a status of Pending, Open, Suspended or Closed (unless you specified a status in the **Status** field).

> **Note:** The primary filters supersede any other selections you make under the Other Filters section.
>
> For example, you selected **Open** in the **Status** field (Primary Filters section) and you selected multiple subscriptions with different statuses in the **Subscription** field (Other Filters section), the report will show only the results for the selected subscriptions with a status of Open.

4. Under Report Display, define the type of report and display option.

Field Name	Description
Report Frequency	Use this field to display the report results grouped by a specific time frequency. You can show the report by month, quarter, or year.
Report Type	Use this field to select the type of report to generate. You can generate the following type of billing forecast reports: ■ MRR (Monthly Recurring Revenue) ■ ACV (Annual Contract Value) ■ New Business ■ Upsell ■ Downsell **Note:** If you selected **ACV** in the **Report Type** field, the **Subscription Analytics From** and **Subscription Analytics To** fields will be disabled, and the **Report Frequency** field will have a default value of **Yearly**.
Group by Customer	Check this option to display the report results grouped by customer.
Group by Subscription	Check this option to display the report results grouped by subscription.
Group by Primary Subscription Item	Check this option to display the report results grouped by primary subscription item.
Group by Secondary Subscription Item	Check this option to display the report results grouped by secondary subscription item.

> **Note:** If all display options (Group By fields) are checked, the report result will be grouped in this specific order: customer > subscription > primary subscription item > secondary subscription item.

5. Click **Generate Report** to generate the billing forecast report. When the report generation is finished, NetSuite sends you an email notification that includes a link to the generated report.

   If the report generation is taking some time to load, the page will automatically stop loading the report and notify you that an email will be sent when the report generation is done. At any time while the report generation is in progress, you can also click the link on the progress bar if you want to stop loading the report and be notified by email.

   > **Note:** If you did not receive the email notification, it is possible that a timeout occurred while the report is being generated. If this happens, refine your search criteria.

   > **Note:** If you are using Internet Explorer 11, a confirmation message will be shown at the top of the page when the report generation is done. Click the link shown on the confirmation message to open the report in a new window.

   > **Note:** The Recurring Billing SuiteApp uses a custom record to generate the Billing Forecast Report. Report results are truncated if they exceed the maximum number of items that can appear on a custom record's sublist. If this happens, you should refine your search criteria to be able to generate a full report.

6. The report is generated in PDF file format. To export an XML file of the report, click **Save as XML**.

   A confirmation message appears at the top of the page with the report filename. To download the XML file, go to Documents > Files > File Cabinet. On the file cabinet, go to SuiteBundles > Bundle 72215 > RB Forecast Reports.

Recurring Billing Integration

Recurring Billing Integration provides an API-based architecture that you can use to build integrations and extensions to the Recurring Billing SuiteApp.

Using a script file that is provided with the SuiteApp, you can set up Recurring Billing Integration in two ways:

- Creating a RESTlet – create a RESTlet using the script file
- Attaching a Library File to a Script Record – attach the script file as a library file to a script record (for script types other than a RESTlet)

The integration architecture is based on passing JSON objects to a script. A request object is used to initiate the operation and a response object is returned at the completion of the operation. All requests are sent using the POST method.

The same features and methods are supported whether you set up Recurring Billing Integration as a RESTlet or as a library file to a script record. The only difference is that the RESTlet passes a JSON object with a method property to a common handler, rather than invoking the specific method, which is the case when attaching the script file as a library file to a script record.

Recurring Billing Integration supports the following functionalities:

- General Discovery – retrieves available items, subscription plan details, rate plan details, subscription details, or customer transactions
- Subscription Creation – creates a rate plan, subscription plan, usage data record, sales order, or subscription from a sales order
- Subscription Management – updates subscriptions using the change order mechanism, evaluates the revenue impact if a specified change order is to be executed for a specific subscription, or cancels a pending change order

For more information on supported objects and methods for Recurring Billing Integration, see Supported Methods.

Important: Make sure that the bundle ID specified on the Subscription Billing Preferences is the same as the bundle ID of the currently installed version of the Recurring Billing SuiteApp.

The bundle ID for the installed Recurring Billing SuiteApp is found at Customization > SuiteBundler > Search & Install Bundles > List. Look for Recurring Billing to see the corresponding bundle ID information.

To check for or set the bundle ID preference, go to Subscription Billing > Account Setup > Subscription Billing Preferences List. Verify if the value for Bundle ID matches the bundle ID for the installed Recurring Billing SuiteApp. If the values do not match, click **Edit** next to Bundle ID. Enter the correct bundle ID in the **Value** field and click **Save**.

Setting Up Recurring Billing Integration

Creating a RESTlet

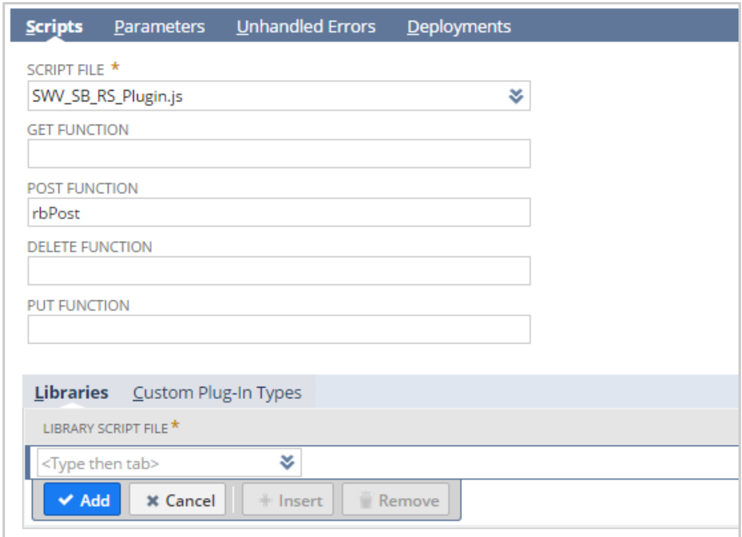
RESTlets are a specialized type of SuiteScript based on REST principles.

You can create a RESTlet to enable remote systems to interact with the Recurring Billing SuiteApp in the same way as scripts on the NetSuite server. Use the script file provided with the Recurring Billing SuiteApp when you create a new RESTlet for Recurring Billing Integration.

For more information on RESTlets, see the help topic RESTlets.

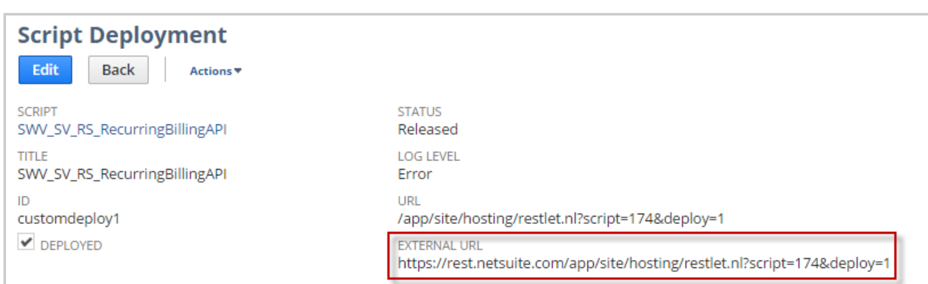
To create a RESTlet for Recurring Billing Integration:

1. Go to Customization > Scripting > Scripts > New.
2. Select **RESTlet**.
3. On the script record, enter a name for the RESTlet.
4. On the **Scripts** subtab:
   - In the **Script File** field, select **SWV_SB_RS_Plugin.js**.
   - In the **POST Function** field, enter **rbPost**.



5. Specify values for the other fields on the script record as necessary. For more information, see the help topic Creating a RESTlet.
6. Click **Save**.
7. After creating a RESTlet, you need to deploy the script to generate a URL that you can use for all REST request.
   a. On the RESTlet record, click **Deploy Script**.
   b. Specify values for the fields on the script deployment record as necessary. For more information, see the help topic Steps for Defining a Script Deployment.
   c. Click **Save**.
   d. Copy the External URL found on the script deployment record.

> **Note:** When you access the script deployment record through the SuiteScript Debugger domain, you will get an external URL that starts with https://debugger.netsuite.com. You will get an error when you use this external URL to send REST requests.
>
> Always use the external URL that starts with https://rest.netsuite.com (see the following screenshot).



You can use the external URL to call the RESTlet from an externally hosted client. To call a RESTlet from a client hosted by NetSuite, use the URL that does not include the domain.

The initial REST request must include the Authorization header with the standard NetSuite account, user, password, and role information. Subsequent calls would then set the session header with the value returned by the original call. For more information, see the help topic Authentication for RESTlets.

For a list of supported objects and methods, see Recurring Billing Integration Supported Methods.

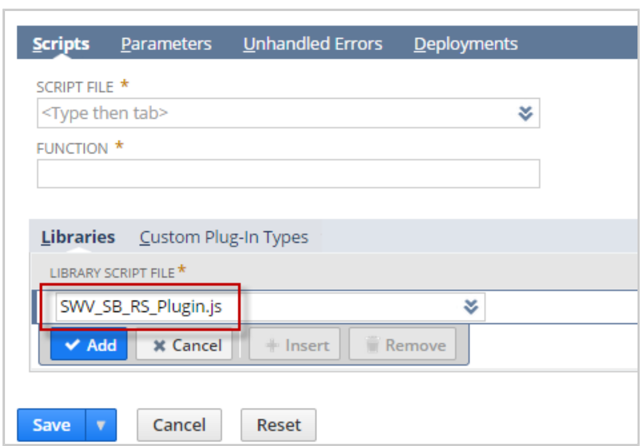
Attaching a Library File to a Script Record

For script types other than a RESTlet, you can attach the Recurring Billing Integration script file as a library file to a script record to invoke the underlying Recurring Billing functionality in the same way as in the user interface.

When you create a new script record or edit an existing one, select the script file **SWV_SB_RS_Plugin.js** in the Libraries sublist on the **Scripts** subtab. Inside your script, you can instantiate a JSON object and access its functions.

For more information on creating a script, read the following topics:

- SuiteScript 1.0 Script Types Overview
- Running Scripts in NetSuite Overview
- Steps for Creating a Script Record



Example:

The following sample script creates a new sales order record. It then uses the sales record to create a new Recurring Billing subscription. Note that the sales order and the subscription are both created within the same method call.

```
var result        = null;

    rbOperations = new nsRbObject(); // class

    request  = {
        "rbCustomer"               : 987,
        "rbStartAt"                : "1/4/2013",
        "rbOrderDetails" : [{"rbItem": 105,
                     "rbSubscriptionPlan": 104,
                     "rbSubscriptionStartAt": "11/12/2013",
                     "rbSubscriptionPlanDiscount": 23,
                     "rbSubscriptionPlanItems" : [{"rbSubscriptionPlanItem": 204,
```

```
                                                "rbSubscriptionPlanItemQuantity" : 200 }]
                }]
    };

// invoke function
response = rbOperations.rbCreateSubscriptionFromOrder(request);

// check the results
if (response.errorCode) {
    nlapiLogExecution('error', 'Operation Failed!', response.errorDetails)}
else {
    nlapiLogExecution('debug', 'Success','Subscription Id: ' +
         response.rbCustomer.id)}
```

For a list of supported objects and methods, see Supported Methods.

Supported Methods

The same features and methods are supported whether you set up Recurring Billing Integration as a RESTlet or as a library file to a script record. The only difference is that the RESTlet passes a JSON object with a method property to a common handler, rather than invoking the specific method, which is the case when attaching the script file as a library file to a script record.

When using the RESTlet, you must specify the selected method in the required property **rbMethod** at the beginning of the request object. This specification determines which method will process the subsequent parameters passed. The other request parameters are dependent on the specified method. Required and optional parameters inside the request object must match, otherwise a blank response will be returned.

Recurring Billing Integration supports the following methods:

Method	Description
General Discovery Methods	
rbGetCustomerSubscriptionDetails	Retrieves a primary subscription item and its secondary subscription items.
rbGetCustomerSubscriptions	Retrieves subscription details, including primary subscription items, for a specified customer.
rbGetCustomerTransactions	Retrieves subscription transactions and payment methods.
rbGetLeadItems	Provides a list of active lead items that are available for sale with a subscription.
rbGetRatePlanDetails	Provides details of a specified rate plan.
rbGetSubscriptionPlans	Provides a list of subscription plans for a specified lead item.
Note: You can specify additional fields to be included in the response object of general discovery methods. For more information, see Custom Field Objects for General Discovery Methods.	
Subscription Creation Methods	

Method	Description
rbCreateRatePlan	Creates a new rate plan.
rbCreateSalesOrder	Creates a sales order record with an option to set its status to either Pending Fulfillment or Pending Approval. This method supports forms based on the Recurring Billing custom form (Subscription Billing – Sales Order).
rbCreateStandardSalesOrder	Creates a sales order record with an option to set its status to either Pending Fulfillment or Pending Approval. This method supports forms based on the NetSuite standard sales order form.
rbCreateSubscriptionFromOrder	Creates a sales order record with an approved status and uses this sales order to create a subscription. This method supports forms based on the Recurring Billing custom form (Subscription Billing – Sales Order).
rbCreateSubscriptionPlan	Creates a new subscription plan.
rbCreateUsageData	Creates usage data records.
Subscription Management Methods	
rbCancelChangeOrder	Cancels a pending subscription change order.
rbCreateChangeOrder	Creates a subscription change order and schedules it for execution at the start of day for the specified date.
rbEvaluateChangeOrder	Evaluates the revenue impact if the specified subscription change order, with the specified properties, is to be executed.

Important Things to Note

- A user error encountered will cause script execution to be aborted because nlapiCreateError is used in handling errors in the request. This validation occurs in all methods of the script.
- The request parameter for date must be specified using the date format set in the user preferences.

> **Note:** When you enter an invalid date, JavaScript automatically converts it into a valid date. For example, when you enter 6/32/2014, the date will be set to 7/2/2014.

  - Some records have date and time components in certain fields, for example, the start and end date fields in rbCreateUsageData. For records with date fields that have date and time components:
    - If the request parameter for date has no time component and the format is valid (follows user preferences for date format), the time will automatically be set to 12:00:00 AM (0:00:00).
    - If the time format preference is AM/PM and the time component entered does not have AM or PM designation, any value entered from 0:00:00 through 11:59:59 will default to AM and value entered from 12:00:00 onwards will default to PM. For example, if time component entered is 2:30:00, it will be set to 2:30:00 AM.
    - If the time format preference is 24 hours and the time component entered has an AM or PM designation, it will be converted accordingly. For example, if time component entered is 4:08:00 PM, it will be set to 16:08:00.

- For records with start and end dates that only have a date component, an error is returned when the request parameter for these fields have a time component.

Custom Field Objects for General Discovery Methods

You can specify additional fields to be included in the response object of general discovery methods. You can set these preferences in the Recurring Billing user interface.

To add custom fields in the response of supported objects, you need to do the following:

- Create a saved search where you can define the fields that you want to include in the response object. See Defining a Saved Search for the Supported Object.
- Set the custom field preferences for the supported object. See Setting Up Custom Fields for General Discovery Methods.

Defining a Saved Search for the Supported Object

1. Go to Lists > Search > Saved Searches > New.
2. Select a search type. Only the following search types can be used for the supported response objects.

Search Type	Object
Subscription Item	rbSubscription
Subscription	rbSubscriptionAgreement
Subscription Item	rbSubscriptionItem
Subscription Plan	rbSubscriptionPlan
Subscription Plan Item	rbSubscriptionPlanItem
Rate Plan	rbRatePlan
Item	Item
Customer	Customer
Contact	Contact
Transaction	Transaction

3. On the **Search Title** field, enter a title for your saved search.
4. Make the saved search public by checking the **Public** box.
5. On the **Results** subtab, specify the fields that you want to include in the response object.
6. Enter additional information as necessary. For more information about saved searches, see the help topic Saved Searches.
7. Click **Save**.

Setting Up Custom Fields for General Discovery Methods

1. Go to Subscription Billing > Account Setup > Subscription Billing Preferences.
2. On the Subscription Billing Preferences page, click **Edit**.

3. Click the **Integration Preferences** subtab.
4. Choose which supported object you want to define custom fields for and specify the saved search you have created for the object. The search type of the saved search that you selected must match the object.

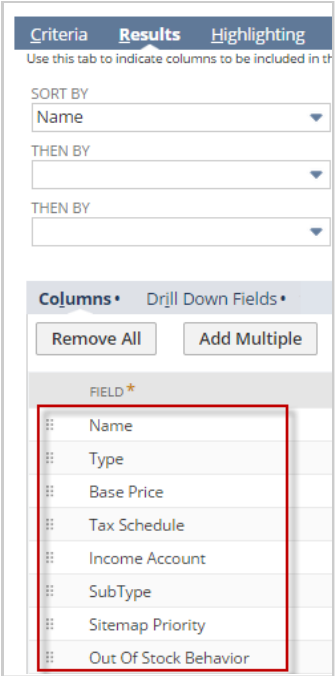
Integration Preferences Field	Description
rbSubscription	Adds the custom fields defined in the selected saved search to the **rbSubscription** response object. Saved search type must be Subscription Item.
rbSubscriptionAgreement	Adds the custom fields defined in the selected saved search to the **rbSubscriptionAgreement** response object. Saved search type must be Subscription.
rbSubscriptionItem	Adds the custom fields defined in the selected saved search to the **rbSubscriptionItems** response object. Saved search type must be Subscription Item.
rbSubscriptionPlan	Adds the custom fields defined in the selected saved search to the **rbSubscriptionPlans** response object. Saved search type must be Subscription Plan.
rbSubscriptionPlanItem	Adds the custom fields defined in the selected saved search to the **rbSubscriptionPlanItems** response object. Saved search type must be Subscription Plan Item.
rbRatePlan	Adds the custom fields defined in the selected saved search to the **rbRatePlan** response object. Saved search type must be Rate Plan.
Item	Adds the custom fields defined in the selected saved search to the **rbItem** response object. Saved search type must be Item.
Customer	Adds the custom fields defined in the selected saved search to the **rbCustomer** response object. Saved search type must be Customer.
Contact	Adds the custom fields defined in the selected saved search to a contact response object. Saved search type must be Contact.
Transaction	Adds the custom fields defined in the selected saved search to the **rbSubscriptionAgreementTransaction** response object. Saved search type must be Transaction.

5. Click **Save**.

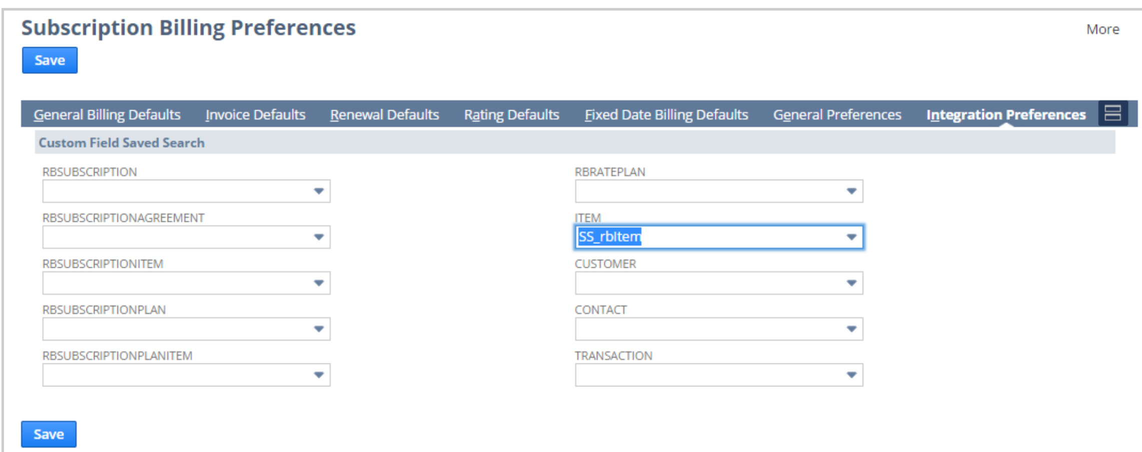
Note: If a saved search is implemented with a discovery method, the filters included in the saved search will also be considered when the method is executed.

Example

The following fields have been defined in a saved search for **rbItem** (search type is Item).



The preceding saved search is then selected in the **Item** field on the Integration Preferences subtab of the Subscription Billing Preferences page.



The following example shows the sample response that includes the custom field objects specified in the saved search.

> **Note:** The set result of the saved search will appear in the response object rbXCustomFields, where X is the parent object name. In this example, it will be **rbItemCustomFields**.
>
> Also, a colon is appended in the property for joins.

Sample Request:

```
{
        "rbMethod":"rbGetLeadItems",
        "Subsidiary":1,
```

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```
}
```

Sample Response:


```
{
      "rbItem": [{
         "id": "105",
         "name": "Lead_item_test",
         "rbItemCustomFields": {
            "itemid": "Lead_item_test",
            "type": {
               "id": "NonInvtPart",
               "name": "Non-inventory Item"
            },
            "baseprice": "",
            "taxschedule": {
               "id": "1",
               "name": "S1"
            },
            "incomeaccount": {
               "id": "54",
               "name": "Sales"
            },
            "subtype": "For Sale",
            "sitemappriority": "",
            "outofstockbehavior": "- Default -"
         }
      }]
}
```


rbCancelChangeOrder

Use this method to cancel a pending change order.

> **Note:** You can only cancel a change order that is in pending status.

Parameters

- `rbChangeId` [required] – Internal ID of the change order to be canceled

> **Note:** Any additional properties inside the request object will be ignored.

Returns

- `rbChangeId` – Internal ID of the change order

Example

Sample Request:

```
{
  "rbMethod" : "rbCancelChangeOrder",
  "rbChangeId": 2817
}
```

Sample Response:

```
{
  rbChangeId: 2817
}
```

Back to Supported Methods

rbCreateChangeOrder

> **Note:** For customized Recurring Billing roles that will create change orders, you need to set the permission level for Subscription Change Order custom record to Edit for these custom roles.

Use this method to create a subscription change order and schedule it for execution at the start of day (that is, 00:00 in the subscription timezone) for the specified date.

Request properties should include a subscription identifier, an effective date, and one of the supported change order objects. Only one change order object can be included in each request.

> **Note:** You can specify more than one subscription item to be changed per request.

Parameters

- `rbSubscription` [required] – Internal ID of the subscription.
- `rbChangeAt` [required] – Effective date or execution date. Date must be specified using the date format set in the user preferences.
- `rbExecuteAt` [optional] – Execution date for Terminate Subscription Item change order. Date must be specified using the date format set in the user preferences. Use this parameter only with the rbTerminate change order object. An error will be returned if parameter is used for other change orders.
- *(change order object)* [required] – Change order object and additional request parameters associated with it. See list of Change Order Objects.

Returns

- `rbSubscription` – Internal ID of the subscription
- `rbChanges` – Details of the change order
  - `rbChange` – Internal ID of the change order
  - `rbSubscriptionItem` – Internal ID of the subscription item
  - `rbChangeURN` – External ID of the change order

Change Order Objects

The following change order objects are supported in the rbCreateChangeOrder method.

Object	Description	Equivalent Subscription Change Order Action
rbAddToExisting	Adds an item to an existing subscription.	Add Subscription Item
rbExtendTerm	Extends the end date of a subscription item.	Extend Subscription Item End Date
rbManagePricing	Updates the pricing of a subscription item.	Modify Subscription Item Rate

Object	Description	Equivalent Subscription Change Order Action
rbMigrateSubscription	Migrates a subscription from one subscription plan to a new subscription plan.	Migrate Subscription Plan
rbOneTimeCharge	Adds a positive or negative one-time charge to a subscription.	Add One Time Charge
rbReactivate	Reactivates a suspended subscription item.	Reactivate Subscription Item
rbSetFixedUsage	Modifies the quantity of a fixed usage item within a subscription.	Modify Quantity for Fixed Usage
rbSetStartDate	Modifies the start date a subscription.	Modify Subscription Start Date
rbSuspend	Suspends a subscription item.	Suspend Subscription Item
rbTerminate	Terminates a subscription item.	Terminate Subscription Item

Important Things to Note:

- If the change order object is missing from the request property of the rbCreateChangeOrder method, an error will be returned.
- rbSubscriptionItem (additional parameter under the change order objects) must match the rbSubscription parameter in the rbCreateChangeOrder method.

Back to Supported Methods

rbAddToExisting

Use this object with the rbCreateChangeOrder method to add an item to an existing subscription.

> **Note:** The rbChangeAt request parameter of the rbCreateChangeOrder method is not applicable to rbAddToExisting. This change order object executes immediately.

Parameters

- `rbItem` [required] – Internal ID of the lead item that you want to add to the subscription
- `rbSubscriptionPlan` [required] – Internal ID of the subscription plan that is associated with the selected rbItem
- `rbSubscriptionOption` [required] – Internal ID of the subscription option

Internal ID	Subscription Option	Description
1	Add to existing, align with current billing close and prorate	Adds an item to an existing subscription and adjusts its billing date to align with the current billing cycle of the subscription. Proration will be applied to charges that fall within the current billing cycle.
2	Add to existing, align with next billing cycle start with no proration	Adds an item to an existing subscription and adjusts its billing date to align with the next billing cycle of the subscription. No proration will be applied to charges that fall outside of the next billing cycle. **Note:** If this option is selected, the date specified in the rbSubscriptionStartAt parameter must coincide with any future billing cycle start date.

- `rbSubscriptionCotermination` [optional] – Internal ID of the co-term option. Co-term enables you to align the end dates of subscription items when adding items to an existing subscription.

Internal ID	Co-termination Option	Description
1	Add new item but no co-term alignment (default)	Adds a new item to an existing subscription without aligning the end dates.
2	Align new item's co-term with existing subscription	Adds a new item and aligns its end date to the existing subscription item's end date. **Note:** You can align multiple items to the same existing item. A newly added item's end date can only be truncated.
3	Align existing item's co-term with newly added item	Adds a new item to an existing subscription and aligns the existing subscription item's end date to the new item's end date. **Note:** You can co-term an existing item with a newly added item only one time (1:1). An existing item's end date can only be extended.

- `rbSubscriptionCoterminationItem` [required if rbSubscriptionCotermination is 2 or 3] – Internal ID of the co-term item
- `rbSubscriptionStartAt` [required] – Date when the item will be added to the subscription. Date must be specified using the date format set in the user preferences. Start date must be current date or any future date and must be equal to or later than the existing subscription's start date.
- `rbSubscriptionItemStartType` [optional] – Internal ID of the item start type. If not provided, the item start type defaults to Immediate (1) and the subscription item will be created with a status of Open or Pending, depending on the subscription item start date.

Internal ID	Subscription Item Start Type	Description
1	Immediate (default)	Creates a subscription item with a status of Open. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Open when the start date is equal to the current date.
2	Suspended	Creates a subscription item and sets its status to Suspended upon creation. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Suspended when the start date is equal to the current date.

Example

Sample Request:

```
{
      "rbMethod" : "rbCreateChangeOrder",
      "rbSubscription": 5,
      "rbAddToExisting": [{
            "rbItem": 105,
            "rbSubscriptionPlan": 8,
            "rbSubscriptionOption": 2,
            "rbSubscriptionCotermination": 2,
            "rbSubscriptionCoterminationItem": 1308,
```

```
            "rbSubscriptionStartAt": 5/28/2014,
            "rbSubscriptionItemStartType": 1
     }]
}
```

Sample Response:

```
{
      "rbSubscription": 5,
      "rbChanges": [
       {
        "rbChange": "411",
        "rbSubscriptionItem": null
        "rbChangeURN": null
       },
      ]
}
```

> **Note:** The rbSubscriptionItem object in the response of rbAddToExisting change order always returns null because the subscription item is not yet created when the change order is executed.

Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbExtendTerm

Use this object with the rbCreateChangeOrder method to extend the end date of a subscription item.

rbExtendTerm is applicable only to non-perpetual items with a status of Open, Pending, or Suspended.

> **Note:** The date you specify in the rbChangeAt request parameter of the rbCreateChangeOrder method is the new end date for the subscription item. The new end date must be later than the original end date and must not be more than 120 months from the subscription item start date.

Parameters

- `rbSubscriptionItem [required]` – Internal ID of the primary subscription item
- `rbChangeURN [optional]` – External ID of the change order

This change order is effective immediately and cannot be canceled. The new end date is applied to the primary item and its secondary subscription items (as applicable, depending on the duration and offset values).

Example

Sample Request:

```
{
 "rbMethod" : "rbCreateChangeOrder",
 "rbSubscription": 125,
 "rbChangeAt": "5/29/2017",
 "rbExtendTerm": [{
     "rbSubscriptionItem": 4211,
     "rbChangeURN": null
     }]
}
```

Sample Response:

```
{
   "rbSubscription": 125,
   "rbChanges": [
       {
           "rbChange": "1027",
           "rbSubscriptionItem": 4211,
           "rbChangeURN": null
       }
   ]
}
```

Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbManagePricing

Use this object with the rbCreateChangeOrder method to update the pricing of a subscription item.

rbManagePricing is applicable only to secondary subscription items with a checked Allow Custom Rate, Allow Line Discount, or Allow Item Uplift option.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the secondary subscription item
- `rbChangeURN` [optional] – External ID of the change order
- `rbStartDate` [required] – Start date for the price adjustment
- `rbEndDate` [optional] – End date for the price adjustment. This parameter is applicable only to discount and uplift.
- `rbSubscriptionPlanItem` [required] – Internal ID of the subscription plan item
- `rbSubscriptionPlanItemDiscount` [specify at least one adjustment parameter] – Percentage discount for the item. Value can be any positive value up to 100, excluding zero.
- `rbSubscriptionPlanItemUplift` [specify at least one adjustment parameter] – Percentage uplift for the item. Value can be any positive value or any negative value down to -100, excluding zero.
- `rbSubscriptionPlanItemRate` [specify at least one adjustment parameter] – New rate for an item that uses a single rate plan. Value can be any positive value, negative value, or zero.
- `rbSubscriptionPlanItemRatePlans` [specify at least one adjustment parameter] – An array of objects that can be used to specify new rates for an item that uses multiple rate plans
  - `rbSubscriptionPlanItemRatePlan` – Internal ID of the rate plan
  - `rbSubscriptionPlanItemRatePlanRate` – New rate for the item. Value can be any positive value, negative value, or zero.

rbManagePricing is the equivalent of the Modify Subscription Item Rate change order. For a better understanding of how this feature works, read the following important things to note about the request parameters for rbManagePricing.

Note for Dates:

Parameter	Description
rbStartDate	Specify when the custom pricing adjustment will be applied. This parameter is required. **rbStartDate** must be equal to or later than the specified

Parameter	Description
	date in the **rbChangeAt** parameter of the rbCreateChangeOrder method.
rbEndDate	Specify an end date for the custom pricing adjustment. This parameter is optional and only applicable to discount and uplift. **rbEndDate** must be equal to or later than **rbStartDate**.
Other Important Things to Note: ▪ Charges for the period where the **rbChangeAt**, **rbStartDate**, and **rbEndDate** fall must be available when you create the change order. ▪ Mid-period adjustment for variable items is not supported. The **rbStartDate** and **rbEndDate** parameters for variable items must coincide with any future period start and end dates. Custom pricing adjustments for variable usage items will be reflected only after the rating engine has run.	

Note for Adjustments:

Adjustment Type	Prerequisite	Allowed Values	Important Things to Note
rbSubscriptionPlanItemDiscount	**Allow Line Discount** box must be enabled on the subscription plan item record.	Percentage discount can be any positive value up to 100, excluding zero.	Only one value for discount is applicable at any particular period. If you specify a new discount, the end date of the previous discount will be set to one day before the start date of the new discount, unless an earlier end date was specified. The new discount must have a start date that is later than the start date of the previous discount.
rbSubscriptionPlanItemUplift	**Allow Item Uplift** box must be enabled on the subscription plan item record.	Percentage uplift can be any positive value or any negative value down to -100, excluding zero.	Multiple uplifts are compounded.
rbSubscriptionPlanItemRate	**Allow Custom Rate** box must be enabled on the subscription plan item record.	Rate can be a positive value, negative value, or zero.	Only one value for rate is applicable at any particular period. If you specify a new rate, the end date of all previous adjustments will be set to one day before the start date of the new rate, unless an earlier end date was specified for discount and uplift. The new rate must have a start date that is later than the start date of the previous rate. When you specify a new rate for an item with Tiered Pricing or Volume Pricing rate plan, the new rate will be applied to all tiers and the charges will be computed in the same way as Flat Rate Pricing. **Example:** ▪ If you specified a new rate of $15 and the rate plan is Tiered Prices, the charges will be computed as if Flat Price is used. The amount of the charges will be $15.

Adjustment Type	Prerequisite	Allowed Values	Important Things to Note
			▪ If you specified a new rate of $15 and the rate plan used is Volume Rates, the charges will be computed as if Flat Rate is used. The amount of the charges will be $15 multiplied by quantity or usage.

Example

Sample Request:

```
{
      "rbMethod":"rbCreateChangeOrder",
      "rbSubscription" : "1021",
      "rbChangeAt": "4/3/2014",
      "rbManagePricing" : [{
            "rbSubscriptionItem": 4528,
            "rbSubscriptionPlanItem": 15,
            "rbChangeURN": null,
            "rbStartDate": "4/1/2014",
            "rbEndDate": "4/30/2014",

            "rbSubscriptionPlanItemDiscount" : 40,
            "rbSubscriptionPlanItemUplift" : 90,

            "rbSubscriptionPlanItemRatePlans": [{
                  "rbSubscriptionPlanItemRatePlan": 6,
                  "rbSubscriptionPlanItemRatePlanRate": 30
            },{
                  "rbSubscriptionPlanItemRatePlan": 5,
                  "rbSubscriptionPlanItemRatePlanRate": 40
            },{
                  "rbSubscriptionPlanItemRatePlan": 4,
                  "rbSubscriptionPlanItemRatePlanRate": 50
            }]
      }]
}
```

Sample Response:

```
{
       "rbSubscription": "1021",
       "rbChanges": [
               {
                       "rbChange": "2710",
                       "rbSubscriptionItem": 4528,
                       "rbChangeURN": null
               }
       ]
}
```

Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbMigrateSubscription

Use this object with the rbCreateChangeOrder method to migrate a subscription from one subscription plan to a new subscription plan.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbTerminationFees` [required] – Internal ID of the termination fee options

Internal ID	Termination Fee Option
1	Maintain Original
2	Charge original and keep new plan's
3	Charge original and do not keep new plan's
4	Use new plan's

> **Note:** If the new subscription plan contains only termination fee items, valid value for `rbTerminationFees` is only 2 (Charge original and keep new plan's) or 4 (Use new plan's).

- `rbNewSubscriptionPlan` [required] – Internal ID of the new subscription plan
- `rbChangeURN` [optional] – External ID of the change order
- `rbProrate` [optional] – If not provided, default value is false (F). To apply proration, change value to true (T).

Example

Sample Request:

```
{
  "rbMethod" : "rbCreateChangeOrder",
  "rbSubscription": 1315,
  "rbChangeAt": "11/7/2013",
  "rbMigrateSubscription": [{
     "rbSubscriptionItem": 5222,
     "rbTerminationFees" : 1,
    "rbNewSubscriptionPlan" : 8,
    "rbProrate": "T",
    "rbChangeURN": null
  }]
}
```

Sample Response:

```
{
  "rbSubscription": 1315,
  "rbChanges": [
         {
         "rbChange": "1511",
         "rbSubscriptionItem": 5222,
         "rbChangeURN": null
       }
      ]
```

```
}
```

Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbOneTimeCharge

Use this object with the rbCreateChangeOrder method to add a one-time charge to a subscription. You can add a positive one-time charge (add-on charge) or a negative one-time charge (concession charge or rebate) to a subscription.

You must set up one-time charge types that you can add to a primary subscription item through a change order. To set up a one-time charge type, go to Subscription Billing > Account Setup > Add One Time Charge Type. You need to specify a unique name and a billing item that will be associated with the one-time charge type. The item must be available to the subsidiary of the primary subscription item where the one-time charge will be added.

Note: This change order object executes immediately. The rbChangeAt request parameter of the rbCreateChangeOrder method is equivalent to the Billing Effective Date in the Add One Time Charge change order form. Billing effective date determines when the one-time charge will be billed. This date is also the start and end dates of the one-time charge.

The billing effective date specified in the rbChangeAt request parameter for rbOneTimeCharge must be equal to or later than the last item billing date of the primary subscription item. If there is no last item billing date, (that is, the item has not yet been billed or item status is Pending), the billing effective date must be equal to or later than the item start date. For non-perpetual items, it must also be earlier than or equal to the term end date.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item where you want to add the one-time charge
- `rbOTC` [required] – Internal ID for the one-time charge type
- `rbAmount` [required] – Amount of the one-time charge in the currency of the subscription. The amount can be any value from -9,999,999.99 to 9,999,999.99.
- `rbNote` [optional] – Description for the one-time charge
- `rbChangeURN` [optional] – External ID of the change order

Note: Both the **Subscription Item Pri** (primary) and **Subscription Item Sec** (secondary) fields of the charge record for a one-time charge show the internal ID of the primary subscription item where the one-time charge is added.

Example

Sample Request:

```
{
      "rbMethod" : "rbCreateChangeOrder",
      "rbSubscription": 1,
      "rbChangeAt": 4/17/2014
      "rbOneTimeCharge": [{
            "rbSubscriptionItem": 1,
            "rbOTC": 6,
            "rbAmount": 150,
            "rbNote": "Training fee",
            "rbChangeURN": ""
```

```
    }]
}
```

Sample Response:


```
{
      "rbSubscription": 1,
      "rbChanges": [
       {
        "rbChange": "3",
        "rbSubscriptionItem": "1",
        "rbChangeURN": null
       },
      ]
}
```


Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbReactivate

Use this object with the rbCreateChangeOrder method to reactivate a subscription item that is in a suspended state.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbBillingOption` [required] – Internal ID of the bill option

Internal ID	Bill Option
1	Bill for the Suspended Period
2	Bill from the Reactivation Date

- `rbExtendTerm` [optional] – If not provided, default value is false (F). If you want to extend the term upon reactivation, set the value to true (T). This parameter is applicable only to non-perpetual items and if the billing option selected is bill from reactivation date, that is, if rbBillingOption is 2. For more information, see Extending the Term Upon Reactivation.
- `rbChangeURN` [optional] – External ID of the change order

Example

Sample Request:

```
{
  "rbMethod" : "rbCreateChangeOrder",
  "rbSubscription": 1013,
  "rbChangeAt": "11/7/2013",
  "rbReactivate": [{
     "rbSubscriptionItem": 4415,
     "rbBillingOption": 2,
     "rbExtendTerm": T,
     "rbChangeURN": null
  }]
}
```

Sample Response:

```
{
       "rbSubscription": 1013,
       "rbChanges": [
        {
         "rbChange": "1816",
         "rbSubscriptionItem": 4415,
         "rbChangeURN": null
        }
       ]
}
```

Extending the Term Upon Reactivation

Specify **rbExtendTerm** in the request parameter of the rbReactivate change order object to extend the subscription term upon reactivation. For a better understanding of how extend term works, take note of the following:

- Extend term is applicable only to non-perpetual items and if the billing option selected is Bill from Reactivation Date.
- You can extend the subscription item's current end date to cover the number of days that it has been suspended.
- The new end date for the subscription item is equal to current date plus number of suspended days.
- The number of suspended days depend on the start type of the subscription item:
  - If start type is Immediate (normal suspension), the number of suspended days is the number of days in between the suspension date and the reactivation date (that is, starting on the day after the suspension date until the day before the reactivation date).
  - If start type is Suspended (suspension upon creation), the number of suspended days includes the suspension date until the day before the reactivation date. However, after you reactivate a subscription item that is created in suspended state, it's start type will change to Immediate. On the next suspension/reactivation of the item, it will now follow the normal count for suspended days (as in normal suspension).
- You can only extend the term upon reactivation if the number of suspended days is at least one day.

Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbSetFixedUsage

Use this object with the rbCreateChangeOrder method to change the quantity of a fixed usage subscription item within a subscription.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the secondary subscription item. Note that the specified secondary subscription item must be of fixed usage item type.
- `rbUsageQuantity` [required] – New value for the quantity. Value can be any positive value or zero.
- `rbChangeURN` [optional] – External ID of the change order

Example

Sample Request:

```
{
  "rbMethod" : "rbCreateChangeOrder",
```

```
  "rbSubscription": 1615,
  "rbChangeAt": "11/7/2013",
  "rbSetFixedUsage": [{
     "rbSubscriptionItem": 5934,
    "rbUsageQuantity": 40,
     "rbChangeURN": null
  }]
}
```

Sample Response:

```
{
      "rbSubscription": 1615,
      "rbChanges": [
       {
        "rbChange": "1920",
        "rbSubscriptionItem": 5934,
        "rbChangeURN": null
       }
      ]
}
```

Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbSetStartDate

Use this object with the rbCreateChangeOrder method to modify the start date of a subscription.

> **Note:** The date you specify in the rbChangeAt request parameter of the rbCreateChangeOrder method is the new start date for the subscription item.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbChangeURN` [optional] – External ID of the change order

Example

Sample Request:

```
{
  "rbMethod" : "rbCreateChangeOrder",
  "rbSubscription": 1213,
  "rbChangeAt": "11/19/2013",
  "rbSetStartDate": [{
     "rbSubscriptionItem": 4815,
     "rbChangeURN": null
  },{
     "rbSubscriptionItem": 4816,
     "rbChangeURN": null}]
}
```

Sample Response:

```
{
```

```
      "rbSubscription": 1213,
      "rbChanges": [
       {
        "rbChange": "1511",
        "rbSubscriptionItem": 4815,
        "rbChangeURN": null
    },
    {
        "rbChange": "1512",
        "rbSubscriptionItem": 4816,
        "rbChangeURN": null
    }
      ]
}
```


Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbSuspend

Use this object with the rbCreateChangeOrder method to suspend a subscription item.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbChangeURN` [optional] – External ID of the change order
- `rbReason` [optional] – Reason for suspending the subscription item

Example

Sample Request:


```
{
  "rbMethod" : "rbCreateChangeOrder",
  "rbSubscription": 1013,
  "rbChangeAt": "11/7/2013",
  "rbSuspend": [{
     "rbSubscriptionItem": 4415,
     "rbChangeURN": null
  }]
}
```


Sample Response:


```
{
      "rbSubscription": 1013,
      "rbChanges": [
       {
        "rbChange": "1013",
        "rbSubscriptionItem": 4415,
        "rbChangeURN": null
         }
      ]
}
```


Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbTerminate

Use this object with the rbCreateChangeOrder method to terminate a subscription item.

> **Note:** When you use rbTerminate with the rbCreateChangeOrder method, the date that you specify in the `rbChangeAt` object is the termination date for the subscription item and the date in the `rbExecuteAt` object is the execution date for the termination change order. The execution date (`rbExecuteAt`) can be earlier than or equal to the termination date (`rbChangeAt`), but not earlier than the transaction date of the sales order associated with the subscription. If you did not specify an execution date in the request, the termination change order execution date will be set to the same date as the termination date that you specified in the `rbChangeAt` object.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbChangeURN` [optional] – External ID of the change order
- `rbReason` [optional] – Reason for terminating the subscription item
- `rbProrate` [optional] – If not provided, default value is false (F). To apply proration, change value to true (T).

Example

Sample Request:

```
{
  "rbMethod" : "rbCreateChangeOrder",
  "rbSubscription": 418,
  "rbChangeAt": "8/20/2016",
  "rbExecuteAt": "8/10/2016",
  "rbTerminate": [{
     "rbSubscriptionItem": 3004,
     "rbProrate": "T",
     "rbChangeURN": null
  }]
}
```

Sample Response:

```
{
      "rbSubscription": 418,
      "rbChanges": [
       {
        "rbChange": "1919",
        "rbSubscriptionItem": 3004,
        "rbChangeURN": null
       }
      ]
}
```

Back to Supported Methods | **Back to** rbCreateChangeOrder | **Back to** Change Order Objects

rbCreateRatePlan

Use this method to create a new rate plan with options to create the tiers.

Parameters

- `rbRatePlan` – An array of objects used to create a new rate plan
  - `rbRatePlanName` [required] – Name for the rate plan
  - `rbRatePlanModel` [required] – Internal ID of the rating model that will be used for the rate plan

Internal ID	Rating Model	Description
1	Flat Rate Pricing	Charge is not divided into tiers with different rates or prices.
2	Tiered Pricing	Charge is divided into tiers and applies different prices or rates to each tier.
4	Volume Pricing	Charge is computed based on the rate or price for the tier where the rated quantity falls.

  - `rbRatePlanStart` [required] – Effective date when the rate plan becomes available. Date must be specified using the date format set in the user preferences.
  - `rbRatePlanEnd` [optional] – Date after which the rate plan can no longer be used by a subscription item. Date must be specified using the date format set in the user preferences.
  - `rbRatePlanIsUsage` [optional] – If not provided, default value is false (F). If the rate plan will be used for usage-based items, change the value to true (T).

> **Important:** If rbRatePlanIsUsage is set to false and you specify values for request objects that are only valid if this parameter is set to true, an error will be returned and the rate plan will not be created.

  - `rbRatePlanUsageUnit` [required if rbRatePlanIsUsage is set to true (T)] – Internal ID of an existing usage unit record. A usage unit is a unit of measure to which usage rate or price will be applied. This request object is valid only if rbRatePlanIsUsage is set to true (T).
  - `rbRatePlanIncludedUsage` [optional] – Number of usage unit that will not be charged. This request object is valid only if rbRatePlanIsUsage is set to true (T).
  - `rbRatePlanServiceFilter` [optional] – Internal ID of the service filter option. This request object is valid only if rbRatePlanIsUsage is set to true (T).

> **Note:** If rbRatePlanServiceFilter is omitted from the request, it will have a default value of 1 (This Subscription Only). If rbRatePlanServiceFilter is included in the request but it is set to blank or null, it will have no value.

Internal ID	Service Filter	Description
1	This Subscription Only	Select this option to apply the rate plan to the usage data of single subscriptions.
2	Include All Customer Subscriptions	Select this option to apply the rate plan to the usage data of all subscriptions of a single customer.
3	Include Sibling Customer Subscriptions	Select this option to apply the rate plan to the usage data of all subscriptions of a customer and all other customers in the same level within a customer hierarchy.
4	Include Child Customer Subscriptions	Select this option to apply the rate plan to the usage data of all subscriptions of a customer and all its child customers within a customer hierarchy.

- `rbRatePlanRatingFilter` [optional] – Internal ID of an existing rating filter saved search. A rating filter is used by the rate plan to filter usage data to be aggregated and rated. This request object is valid only if rbRatePlanIsUsage is set to true (T).
- `rbRatePlanDisplayFilter` [required if rbRatePlanRatingFilter is specified] – Internal ID of an existing display filter saved search. A display filter is used by the rate plan to display usage-based line items in the invoice and charge record. This request object is valid only if rbRatePlanIsUsage is set to true (T). If rbRatePlanRatingFilter is not specified, you can still specify a value for rbRatePlanDisplayFilter.
- `rbRatePlanIsApproved` [optional] – If not provided, default value is false (F)—the rate plan will be created with a status of Prepare and it can only be made available manually through the Request Approval button in the UI. To set the status of the rate plan to Available (or Approved if rbRatePlanStart is set to a future date) upon creation, set the value to true (T).
- `rbRatePlanThresholds` [optional] – Objects used to define the charge threshold for the rate plan
  - `rbRatePlanMinimumCharge` [optional] – Minimum charge for the rate plan
  - `rbRatePlanMaximumCharge` [optional] – Maximum charge for the rate plan

  Note: rbRatePlanMinimumCharge and rbRatePlanMaximumCharge must not have the same value. Value can be zero or any positive number.

- `rbRatePlanShowTierBreakdown` [optional] – If not provided, default value is false (F). If you want to display usage unit details for the item on the Rating Details field of the invoice lines and charge records, set the value to true (T). This request object is valid only if rbRatePlanIsUsage is set to true (T). This option is not valid if rbRatePlanModel is set to flat rate pricing (1).
- `rbRatePlanUsageTiers` [required] – An array of objects used to define the details of each tier for the rate plan
  - `rbRatePlanUsageTierType` [null] – Tier type field is currently not yet available in the usage tier record. Set this object to null or blank.
  - `rbRatePlanUsageTier` [required if rbRatePlanModel is set to tiered or volume pricing (2 or 4)] – Name for the tier. This request object is valid only if the rating model is tiered or volume pricing.
  - `rbRatePlanUsageTierBase` [required if rbRatePlanModel is set to tiered or volume pricing (2 or 4)] – Start value for the tier. This request object is valid only if the rating model is tiered or volume pricing.
  - `rbRatePlanUsageTierAmount` [required] – Charge amount or rate
  - `rbRatePlanUsageTierPricingOption` [required] – Internal ID of the pricing option for the tier

Internal ID	Pricing Option	Description
1	Rate	Value specified for rbRatePlanUsageTierAmount parameter is used as rate. Charge amount for the tier is computed by multiplying the rate and usage quantity for the tier.
2	Price	Value specified for rbRatePlanUsageTierAmount parameter is used as price or the actual charge for the tier.

  - `rbRatePlanUsageTierCurrency` [required if the Multiple Currencies feature is enabled] – Internal ID of the currency to be used in the rate plan. Only the first occurrence of this request object will be used and all succeeding instances will be ignored. If the Multiple Currencies feature is enabled, the first occurrence of this property will be a mandatory field. If the Multiple Currencies feature is disabled, the value for this parameter defaults to the base currency set in the company information, regardless whether a value is specified or not.

> **Important:** If the rating model is flat rate pricing (that is, rbRatePlanModel is set to 1), only rbRatePlanUsageTierAmount, rbRatePlanUsageTierPricingOption (Rate), and rbRatePlanUsageTierCurrency (if the Multiple Currencies feature is enabled) are valid request objects inside rbRatePlanUsageTiers and you can specify values for these objects only one time. rbRatePlanUsageTier and rbRatePlanUsageTierBase must be set to null or blank. Otherwise, an error will be returned and the rate plan will not be created.

> **Note:** Setting historical data sets and historical date range is currently not supported in Recurring Billing Integration.

Returns

- `rbRatePlan` – Internal ID and name of the rate plan created
- `rbRatePlanStatus` – Internal ID and name of the rate plan status

Example

Sample Request:


```
{
   "rbMethod": "rbCreateRatePlan",
   "rbRatePlan": {
       "rbRatePlanName": "Flat_100",
       "rbRatePlanModel": "1",
       "rbRatePlanStart": "5/20/2014",
       "rbRatePlanEnd": "",
       "rbRatePlanIsUsage": "T",
       "rbRatePlanServiceFilter": "1",
       "rbRatePlanRatingFilter": "104",
       "rbRatePlanDisplayFilter": "104",
       "rbRatePlanUsageUnit": "401",
       "rbRatePlanIncludedUsage": "10",
       "rbRatePlanThresholds": {
           "rbRatePlanMinimumCharge": "10",
           "rbRatePlanMaximumCharge": "200"
       },
       "rbRatePlanIsApproved": "T",
       "rbRatePlanShowTierBreakdown": "",
       "rbRatePlanUsageTiers": [{
           "rbRatePlanUsageTierType": "",
           "rbRatePlanUsageTier": "",
           "rbRatePlanUsageTierBase": "",
           "rbRatePlanUsageTierAmount": "100",
           "rbRatePlanUsageTierCurrency" : ""
        }]
   }
}
```

Sample Response:


```
{
   "rbRatePlan": {
       "id": "325",
       "name": "Flat_100",
       "rbPlanStatus": {
           "id": "5",
           "name": "Available"
       }
   }
}
```


Back to Supported Methods

rbCreateSalesOrder

Use this method to create a subscription sales order with the Subscription Billing – Sales Order custom form. You can set the sales order form to be used for Recurring Billing Integration in the **SO Form for Plugin** field on the Subscription Billing Preferences page. For more information, see Setting Up Recurring Billing Preferences.

This method creates a subscription sales order with an option to set its status to either Pending Fulfillment or Pending Approval upon creation. If the sales order is created with a status of Pending Fulfillment, a subscription will automatically be created with the sales order. If the sales order is created with a status of Pending Approval, the sales order needs to be manually approved to create a subscription.

Important Things to Note:

- Use the rbCreateSalesOrder method if you use the Subscription Billing - Sales Order form (or a customized version of this custom form) to create subscription sales orders. To create subscriptions using the standard sales order form, use the rbCreateStandardSalesOrder method.
- For sales orders created through Recurring Billing Integration, the maximum recommended limit is 150 line items per sales order without custom fields. Sales order transactions with more line items may result in performance issues.
- For subscriptions with Fixed Date billing mode, you can add the `rbCustomTransactionBodyFields` object in the request to set the Fixed Billing Date field value. Make sure that you have set up valid fixed billing dates prior to sending a request. For information about setting up fixed billing dates, see Setting Up Fixed Billing Dates.

  You can also use rbCreateSalesOrder to create a sales order with a Pending Approval status, then you can edit the created sales order to assign a fixed billing date for the subscription.
- The rbCreateSalesOrder method runs a user event script to create a sales order. A user event script cannot be executed by other user event scripts, so you will get an error when you reference this method inside a user event script.
- Customer creation currently only supports company type customers.

Parameters

- `rbCustomer` [required] – Internal ID of an existing customer or an object with the following properties:

> **Important:** An error will be returned if a customer is marked as taxable and the tax codes are not set up correctly.
>
> You can choose to have NetSuite automatically determine the correct tax code for a customer based on their shipping address. To do this, go to Setup > Accounting > Set Up Taxes. Check the **Enable Tax Lookup on Sales Transactions** box and click **Save**.

- `customerName` [required] – Name of the customer
- `customerSubsidiary` [required for NetSuite OneWorld accounts only] – Internal ID of the subsidiary
- `customerURN` [optional] – External ID of the customer

  > **Note:** If the external ID provided is already associated with an existing customer, that existing customer record will be used and all other optional parameters in the rbCustomer object will be disregarded. Otherwise, a new customer record will be created.

- `customerCardDetails` [optional] – Details of the customer credit card to be used. If credit card details are provided, the default transaction type is cash sale. Otherwise, transaction type is invoice.
  - `cardNumber` [required] – Credit card number
  - `cardName` [required] – Name on the credit card
  - `cardExpireDate` [required] – Credit card expiry date in MM/YYYY format (with no day component)
  - `cardType` [required] – A valid number for a card type that has been specified in the NetSuite account
- `customerAddress` [optional] – Address of the customer

  > **Note:** You can only specify one address per customer.
  >
  > Make sure that you enter correct values for the following optional address fields. The system does not return an error when invalid values are entered dynamically on the address record.

  - `addressLabel` [optional]
  - `address1` [optional]
  - `address2` [optional]
  - `address3` [optional]
  - `addressCity` [optional]
  - `addressStateProvince` [optional]
  - `addressZip` [optional]
  - `addressCountry` [optional]
- `rbCustomerContact` [optional] – Details of the contact person for the customer

  > **Note:** You can only specify one contact per customer.

  - `contactFirstName` [required]
  - `contactLastName` [optional]
  - `contactEmail` [optional]

- `contactTitle` [optional]
- `contactPhone` [optional]
- `contactSalutation` [optional]
- `contactAddress` [optional]

> **Note:** You can only specify one address per customer contact.
>
> Make sure that you enter correct values for the following optional address fields. The system does not return an error when invalid values are entered dynamically on the address record.

- `addressLabel` [optional]
- `address1` [optional]
- `address2` [optional]
- `address3` [optional]
- `addressCity` [optional]
- `addressStateProvince` [optional]
- `addressZip` [optional]
- `addressCountry` [optional]

- `rbTimezone` [optional] – ID for timezone. If this is not provided, the timezone specified on the Subscription Billing Preferences page is used.

> **Note:** rbTimezone becomes a required parameter if no default timezone is specified on the Subscription Billing Preferences. For information about setting up Recurring Billing preferences, see Setting Up Recurring Billing Preferences.

- `rbOrderURN` [optional] – External ID of the sales order, entered in string data format. Value must be unique.
- `rbSalesOrderIsApproved` [optional] – If this parameter is set to true (T), the sales order will be created with a status of Pending Fulfillment and a subscription will automatically be created. If this parameter is set to false (F), the sales order will be created with a status of Pending Approval and it has to be manually approved to create a subscription. If this parameter is null, blank, or not provided, the sales order status will follow the Default Sales Order Status preference (Setup > Accounting > Accounting Preferences, under Order Management subtab).
- `rbCustomTransactionBodyFields` [optional] – Object that contains key/value pairs to set the values for non-Recurring Billing custom transaction body fields. Use the field ID as the key, and the field value as the value.

  You can also use this object to set the value for the Fixed Billing Date (custbody_sb_fixed_billing_date_so) field on the subscription sales order.

> **Note:** When setting the value for the Fixed Billing Date field, make sure that you have set up valid fixed billing dates prior to sending a request. For more information, see Setting Up Fixed Billing Dates. Make sure to specify the fixed billing date in the date format set in the user preferences.

- `rbOrderDetails` [required] – An array of objects used to add a subscription item to a sales order
  - `rbItem` [required] – Internal ID of the lead item
  - `rbSubscriptionPlan` [required] – Internal ID of the subscription plan

- `rbSubscriptionStartAt` [required] – Start date for the subscription. Date must be specified using the date format set in the user preferences.
- `rbCustomTransactionColumnFields` [optional] – Object that contains key/value pairs to set the values for non-Recurring Billing custom transaction column fields. Use the field ID as the key, and the field value as the value.
- `rbSubscriptionEndAt` [optional] – Custom end date for the subscription. Date must be specified using the date format set in the user preferences. Custom end date must not be less than one rating period from the start date (based on the selected subscription plan's rating frequency) and not more than 120 months from the start date. Take note of the following:
  - If this parameter is not included in the request, the end date is set to the default end date, which is determined based on the start date that you specified and the selected subscription plan's term.
  - If this parameter is included in the request:
    - If the end date value is set to blank, the subscription item will have a Perpetual term.
    - If the end date that you specified is equal to the default end date, the subscription item will follow the original term on the subscription plan.
    - If the end date that you specified is not equal to the default end date, the subscription item will have a Custom Term.

> **Note:** If the original term on the subscription plan is less than 48 months (that is, minimum term has not been set previously), and the custom end date results to a custom term that is more than 36 months, a default minimum term of 36 months is set for the subscription item. Also, the notice period value from the subscription plan is used if the resulting custom term is more than 36 months.
>
> For subscription plans with renewal settings, if the subscription item is originally created with a custom end date, the term upon renewal will still follow the renewal settings from the subscription plan (not the custom term).
>
> For co-term, you can set a custom end date only if `rbSubscriptionCotermination` is set to **1** (Add new item but no co-term alignment) .

- `rbSubscriptionPlanDiscount` [optional] – Plan-level percentage discount to be used
- `rbSubscriptionOption` [optional] – Internal ID of the subscription option

Internal ID	Subscription Option	Description
1	New subscription (default)	Creates a new subscription from the sales order.
2	Add to existing, align with current billing close and prorate	Adds a sales order item to an existing subscription and adjusts its billing date to align with the current billing cycle of the subscription. Proration will be applied to charges that fall within the current billing cycle.
3	Add to existing, align with next billing cycle start with no proration	Adds a sales order item to an existing subscription and adjusts its billing date to align with the next billing cycle of the subscription. No proration will be applied to charges that fall outside of the next billing cycle.

- `rbSubscription` [required if rbSubscriptionOption is 2 or 3] – Internal ID of the existing subscription where you want to add an item. This parameter is processed only if any of the add to existing subscription options is selected, that is, if the value of rbSubscriptionOption is 2 or 3.
- `rbSubscriptionTransactionType` [optional] – Internal ID of the transaction type

Internal ID	Transaction Type
1	Invoice (default if the rbSubscriptionTransactionType parameter is not specified)
2	Cash sale (default if credit card details are provided)

- `rbSubscriptionLocation` [required if the Locations feature is enabled on the account] – Internal ID for the location
- `rbSubscriptionDepartment` [required if the Departments feature is enabled on the account] – Internal ID for the department
- `rbSubscriptionClass` [required if the Classes feature is enabled on the account] – Internal ID for the class
- `rbSubscriptionCotermination` [optional] – Internal ID of the co-term option. Co-term enables you to align the end dates of subscription items when adding items to an existing subscription. This object is processed only if rbSubscription is specified.

Internal ID	Co-term Option	Description
1	Add new item but no co-term alignment (default)	Adds a new item to an existing subscription without aligning the end dates.
2	Align new item's co-term with existing subscription	Adds a new item and aligns its end date to the existing subscription item's end date. **Note:** You can align multiple items to the same existing item. A newly added item's end date can only be truncated.
3	Align existing item's co-term with newly added item	Adds a new item to an existing subscription and aligns the existing subscription item's end date to the new item's end date. **Note:** You can co-term an existing item with a newly added item only one time (1:1). An existing item's end date can only be extended.

> **Note:** For perpetual items, the only valid co-term option is to add the new item but no co-term alignment (that is, rbSubscriptionCotermination is 1).

- `rbSubscriptionCoterminationItem` [required if rbSubscriptionCotermination is 2 or 3] – Internal ID of the co-term item
- `rbSubscriptionItemStartType` [optional] – Internal ID of the item start type. If not provided, the item start type defaults to Immediate (1) and the subscription item will be created with a status of Open or Pending, depending on the subscription item start date.

Internal ID	Subscription Item Start Type	Description
1	Immediate (default)	Creates a subscription item with a status of Open. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Open when the start date is equal to the current date.
2	Suspended	Creates a subscription item and sets its status to Suspended upon creation. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Suspended when the start date is equal to the current date.

- `rbSubscriptionPlanItems` [optional] – An array of objects that can be used to override the default properties for the items within the parent subscription plan
  - `rbSubscriptionPlanItem` [required] – Internal ID of the subscription plan item
  - `rbSubscriptionPlanItemQuantity` [optional, but at least one adjustment must be specified] – New quantity for fixed usage items. This parameter is applicable only to fixed usage items. Value can be any positive value or zero.
  - `rbSubscriptionPlanItemDiscount` [optional, but at least one adjustment must be specified] – Percentage discount for the item. Value can any positive value up to 100, excluding zero. To apply discount, **Allow Line Discount** must be enabled on the subscription plan item record.
  - `rbSubscriptionPlanItemRate` [optional, but at least one adjustment must be specified] – Custom rate for an item that uses a single rate plan. Value can be a positive value, negative value, or zero. To apply custom rate, **Allow Custom Rate** must be enabled on the subscription plan item record.
  - `rbSubscriptionPlanItemRatePlans` [optional, but at least one adjustment must be specified] – An array of objects that can be used to specify custom rates for an item that uses multiple rate plans (that is, variable usage items).
    - `rbSubscriptionPlanItemRatePlan` – Internal ID of the rate plan
    - `rbSubscriptionPlanItemRatePlanRate` – Custom rate for the item. Value can be a positive value, negative value, or zero. To apply custom rate, **Allow Custom Rate** must be enabled on the subscription plan item record.

> **Note:** Specifying the rbSubscriptionPlanItems is similar to specifying custom pricing adjustments using the **Customize Subscription Price** button on the subscription sales order user interface. If you include rbSubscriptionPlanItems in the request, you are required to specify at least one custom pricing adjustment object.

Returns

- `rbSalesOrder` – Internal ID of the sales order
- `rbSubscription` – Internal ID of the subscription (if a subscription is created)
- `rbSubscriptionDetails` – Details of the subscription (if a subscription is created), including:
  - `rbSubscriptionOption`
  - `rbSubscription`
  - `rbSubscriptionTransactionType`
  - `rbSubscriptionLocation`

- `rbSubscriptionDepartment`
- `rbSubscriptionClass`

- `rbCustomer` – ID and name of the customer

Example

Sample Request:

```
{
  "rbMethod":"rbCreateSalesOrder",
  "rbCustomer": 3,
  "rbTimezone": 73,
  "rbSalesOrderIsApproved": "F",
  "rbCustomTransactionBodyFields": {"custbody_sb_fixed_billing_date_so": "4/15/2014"},
  "rbOrderDetails" : [{"rbItem": 105,
                    "rbSubscriptionPlan": 3,
                    "rbSubscriptionStartAt": "4/1/2014",
                    "rbSubscriptionItemStartType": 1,
                    "rbSubscriptionPlanDiscount": 35,

                    "rbSubscriptionPlanItems" : [{"rbSubscriptionPlanItem": 6,
                                               "rbSubscriptionPlanItemQuantity" : 200,
                                                           "rbSubscriptionPlanItemRate" : 6
.50,
                                                           "rbSubscriptionPlanItemDiscount"
 : 10.0
                                             }]
                              }]
}
```

Sample Response:

```
{
    "rbSalesOrder": "349",
    "rbCustomer": {
        "name": "Johnson",
        "id": "3"
    }
}
```

Back to Supported Methods

rbCreateStandardSalesOrder

Use this method to create a subscription sales order with the NetSuite standard sales order form. You can set the sales order form to be used for Recurring Billing Integration in the **SO Form for Plugin** field on the Subscription Billing Preferences page. For more information, see Setting Up Recurring Billing Preferences.

This method creates a subscription sales order with an option to set its status to either Pending Fulfillment or Pending Approval upon creation. If the sales order is created with a status of Pending Fulfillment, a subscription will automatically be created with the sales order. If the sales order is created with a status of Pending Approval, the sales order needs to be manually approved to create a subscription.

Important Things to Note:

- Use the rbCreateStandardSalesOrder method if you use the NetSuite standard sales order form (or a customized version of the standard form) to create subscription sales orders. To create subscriptions using the Subscription Billing - Sales Order custom form, use the rbCreateSalesOrder or rbCreateSubscriptionFromOrder method.
- For sales orders created through Recurring Billing Integration, the maximum recommended limit is 150 line items per sales order without custom fields. Sales order transactions with more line items may result in performance issues.
- There is currently no specific parameter for setting the value of the Fixed Billing Date field on the sales order. For subscriptions with Fixed Date billing mode, you can add the `rbCustomTransactionBodyFields` object in the request to set the Fixed Billing Date field value. Make sure that you have set up valid fixed billing dates prior to sending a request. For information about setting up fixed billing dates, see Setting Up Fixed Billing Dates.

  You can also use rbCreateStandardSalesOrder to create a sales order with a Pending Approval status, then you can edit the created sales order to assign a fixed billing date for the subscription.
- The rbCreateStandardSalesOrder method runs a user event script to create a sales order. A user event script cannot be executed by other user event scripts, so you will get an error when you reference this method inside a user event script.
- Customer creation currently only supports company type customers.

Parameters

- `rbCustomer` [required] – Internal ID of an existing customer or an object with the following properties:

  > **Important:** An error will be returned if a customer is marked as taxable and the tax codes are not set up correctly.
  >
  > You can choose to have NetSuite automatically determine the correct tax code for a customer based on their shipping address. To do this, go to Setup > Accounting > Set Up Taxes. Check the **Enable Tax Lookup on Sales Transactions** box and click **Save**.

  - `customerName` [required] – Name of the customer
  - `customerSubsidiary` [required for NetSuite OneWorld accounts only] – Internal ID of the subsidiary
  - `customerURN` [optional] – External ID of the customer

    > **Note:** If the external ID provided is already associated with an existing customer, that existing customer record will be used and all other optional parameters in the rbCustomer object will be disregarded. Otherwise, a new customer record will be created.

  - `customerCardDetails` [optional] – Details of the customer credit card to be used. If credit card details are provided, the default transaction type is cash sale. Otherwise, transaction type is invoice.
    - `cardNumber` [required] – Credit card number
    - `cardName` [required] – Name on the credit card
    - `cardExpireDate` [required] – Credit card expiry date in MM/YYYY format (with no day component)

    - `cardType` [required] – A valid number for a card type that has been specified in the NetSuite account
  - `customerAddress` [optional] – Address of the customer

    Note: You can only specify one address per customer.

    Make sure that you enter correct values for the following optional address fields. The system does not return an error when invalid values are entered dynamically on the address record.

    - `addressLabel` [optional]
    - `address1` [optional]
    - `address2` [optional]
    - `address3` [optional]
    - `addressCity` [optional]
    - `addressStateProvince` [optional]
    - `addressZip` [optional]
    - `addressCountry` [optional]
  - `rbCustomerContact` [optional] – Details of the contact person for the customer

    Note: You can only specify one contact per customer.

    - `contactFirstName` [required]
    - `contactLastName` [optional]
    - `contactEmail` [optional]
    - `contactTitle` [optional]
    - `contactPhone` [optional]
    - `contactSalutation` [optional]
    - `contactAddress` [optional]

      Note: You can only specify one address per customer contact.

      Make sure that you enter correct values for the following optional address fields. The system does not return an error when invalid values are entered dynamically on the address record.

      - `addressLabel` [optional]
      - `address1` [optional]
      - `address2` [optional]
      - `address3` [optional]
      - `addressCity` [optional]
      - `addressStateProvince` [optional]
      - `addressZip` [optional]
      - `addressCountry` [optional]
- `rbTimezone` [optional] – ID for timezone. If this is not provided, the timezone specified on the Subscription Billing Preferences page is used.

> **Note:** rbTimezone becomes a required parameter if no default timezone is specified on the Subscription Billing Preferences page. For information about setting up Recurring Billing preferences, see Setting Up Recurring Billing Preferences.

- `rbOrderURN` [optional] – External ID of the sales order, entered in string data format. Value must be unique.
- `rbSalesOrderIsApproved` [optional] – If this parameter is set to true (T), the sales order will be created with a status of Pending Fulfillment and a subscription will automatically be created. If this parameter is set to false (F), the sales order will be created with a status of Pending Approval and it has to be manually approved to create a subscription. If this parameter is null, blank, or not provided, the sales order status will follow the Default Sales Order Status preference (Setup > Accounting > Accounting Preferences, under Order Management subtab).
- `rbCustomTransactionBodyFields` [optional] – Object that contains key/value pairs to set the values for non-Recurring Billing custom transaction body fields. Use the field ID as the key, and the field value as the value.

  You can also use this object to set the value for the Fixed Billing Date (custbody_sb_fixed_billing_date_so) field on the subscription sales order.

> **Note:** When setting the value for the Fixed Billing Date field, make sure that you have set up valid fixed billing dates prior to sending a request. For more information, see Setting Up Fixed Billing Dates. Make sure to specify the fixed billing date in the date format set in the user preferences.

- `rbOrderDetails` [required] – An array of objects used to add a subscription item to a sales order
  - `rbItem` [required] – Internal ID of the lead item
  - `rbSubscriptionPlan` [required] – Internal ID of the subscription plan
  - `rbSubscriptionStartAt` [required] – Start date for the subscription. Date must be specified using the date format set in the user preferences.
  - `rbCustomTransactionColumnFields` [optional] – Object that contains key/value pairs to set the values for non-Recurring Billing custom transaction column fields. Use the field ID as the key, and the field value as the value.
  - `rbSubscriptionEndAt` [optional] – Custom end date for the subscription. Date must be specified using the date format set in the user preferences. Custom end date must not be less than one rating period from the start date (based on the selected subscription plan’s rating frequency) and not more than 120 months from the start date. Take note of the following:
    - If this parameter is not included in the request, the end date is set to the default end date, which is determined based on the start date that you specified and the selected subscription plan’s term.
    - If this parameter is included in the request:
      - If the end date value is set to blank, the subscription item will have a Perpetual term.
      - If the end date that you specified is equal to the default end date, the subscription item will follow the original term on the subscription plan.
      - If the end date that you specified is not equal to the default end date, the subscription item will have a Custom Term.

> **Note:** If the original term in the subscription plan is less than 48 months (that is, minimum term has not been set previously), and the custom end date results to a custom term that is more than 36 months, a default minimum term of 36 months is set for the subscription item. For subscription plans with renewal settings, if the subscription item is originally created with a custom end date, the term upon renewal will still follow the renewal settings from the subscription plan (not the custom term).

- `rbSubscriptionNoticePeriod` [optional] – Notice period for the subscription item. This request object is valid only if you set a custom end date in the `rbSubscriptionEndAt` parameter that results to a term of more than 36 months. Value can be any positive integer from 1 to 120.
- `rbSubscriptionPlanDiscount` [optional] – Plan-level percentage discount to be used
- `rbSubscriptionOption` [optional] – Internal ID of the subscription option

Internal ID	Subscription Option	Description
1	New subscription (default)	Creates a new subscription from the sales order.
2	Add to existing, align with current billing close and prorate	Adds a sales order item to an existing subscription and adjusts its billing date to align with the current billing cycle of the subscription. Proration will be applied to charges that fall within the current billing cycle.
3	Add to existing, align with next billing cycle start with no proration	Adds a sales order item to an existing subscription and adjusts its billing date to align with the next billing cycle of the subscription. No proration will be applied to charges that fall outside of the next billing cycle.

- `rbSubscription` [required if rbSubscriptionOption is 2 or 3] – Internal ID of the existing subscription where you want to add an item. This parameter is processed only if any of the add to existing subscription options is selected, that is, if the value of rbSubscriptionOption is 2 or 3.
- `rbSubscriptionTransactionType` [optional] – Internal ID of the transaction type

Internal ID	Transaction Type
1	Invoice (default if the rbSubscriptionTransactionType parameter is not specified)
2	Cash sale (default if credit card details are provided)

- `rbSubscriptionLocation` [required if the Locations feature is enabled on the account] – Internal ID for the location
- `rbSubscriptionDepartment` [required if the Departments feature is enabled on the account] – Internal ID for the department
- `rbSubscriptionClass` [required if the Classes feature is enabled on the account] – Internal ID for the class
- `rbSubscriptionCotermination` [optional] – Internal ID of the co-term option. Co-term enables you to align the end dates of subscription items when adding items to an existing subscription. This object is processed only if rbSubscription is specified.

Internal ID	Co-term Option	Description
1	Add new item but no co-term alignment (default)	Adds a new item to an existing subscription without aligning the end dates.
2	Align new item's co-term with existing subscription	Adds a new item and aligns its end date to the existing subscription item's end date. **Note:** You can align multiple items to the same existing item. A newly added item's end date can only be truncated.
3	Align existing item's co-term with newly added item	Adds a new item to an existing subscription and aligns the existing subscription item's end date to the new item's end date. **Note:** You can co-term an existing item with a newly added item only one time (1:1). An existing item's end date can only be extended.

> **Note:** For perpetual items, the only valid co-term option is to add the new item but no co-term alignment (that is, rbSubscriptionCotermination is 1).

- `rbSubscriptionCoterminationItem` [required if rbSubscriptionCotermination is 2 or 3] – Internal ID of the co-term item
- `rbSubscriptionItemStartType` [optional] – Internal ID of the item start type. If not provided, the item start type defaults to Immediate (1) and the subscription item will be created with a status of Open or Pending, depending on the subscription item start date.

Internal ID	Subscription Item Start Type	Description
1	Immediate (default)	Creates a subscription item with a status of Open. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Open when the start date is equal to the current date.
2	Suspended	Creates a subscription item and sets its status to Suspended upon creation. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Suspended when the start date is equal to the current date.

- `rbSubscriptionPlanItems` [optional] – An array of objects that can be used to override the default properties for the items within the subscription plan
  - `rbSubscriptionPlanItem` [required] – Internal ID of the subscription plan item
  - `rbSubscriptionPlanItemQuantity` [optional, but at least one adjustment must be specified] – New quantity for fixed usage items. This parameter is applicable only to fixed usage items. Value can be any positive value or zero.
  - `rbSubscriptionPlanItemDiscount` [optional, but at least one adjustment must be specified] – Percentage discount for the item. Value can any positive value up to 100, excluding zero. To apply discount, **Allow Line Discount** must be enabled on the subscription plan item record.

- `rbSubscriptionPlanItemRate` [optional, but at least one adjustment must be specified] – Custom rate for an item that uses a single rate plan. Value can be a positive value, negative value, or zero. To apply custom rate, **Allow Custom Rate** must be enabled on the subscription plan item record.
- `rbSubscriptionPlanItemRatePlans` [optional, but at least one adjustment must be specified] – An array of objects that can be used to specify custom rates for an item that uses multiple rate plans (that is, variable usage items).
  - `rbSubscriptionPlanItemRatePlan` – Internal ID of the rate plan
  - `rbSubscriptionPlanItemRatePlanRate` – Custom rate for the item. Value can be a positive value, negative value, or zero. To apply custom rate, **Allow Custom Rate** must be enabled on the subscription plan item record.

> **Note:** Specifying the rbSubscriptionPlanItems is similar to specifying custom pricing adjustments using the **Customize Subscription Price** button on the subscription sales order user interface. If you include rbSubscriptionPlanItems in the request, you are required to specify at least one custom pricing adjustment object.

Returns

- `rbSalesOrder` – Internal ID of the sales order
- `rbSubscription` – Internal ID of the subscription (if a subscription is created)
- `rbSubscriptionDetails` – Details of the subscription (if a subscription is created), including:
  - `rbSubscriptionOption`
  - `rbSubscription`
  - `rbSubscriptionTransactionType`
  - `rbSubscriptionLocation`
  - `rbSubscriptionDepartment`
  - `rbSubscriptionClass`
- `rbCustomer` – ID and name of the customer

Example

Sample Request:

```
{
  "rbMethod":"rbCreateStandardSalesOrder",
  "rbCustomer": 3,
  "rbTimezone": 73,
  "rbSalesOrderIsApproved": "F",
  "rbCustomTransactionBodyFields": {"billaddresslist": "12332", "custbody_category": "2234"},
  "rbOrderDetails" : [{"rbItem": 105,
                   "rbSubscriptionPlan": 3,
                   "rbSubscriptionStartAt": "9/1/2016",
                   "rbSubscriptionEndAt": "12/31/2020",
                   "rbSubscriptionNoticePeriod": "10",
                   "rbSubscriptionItemStartType": 1,
                   "rbSubscriptionPlanDiscount": 35,

                   "rbSubscriptionPlanItems" : [{"rbSubscriptionPlanItem": 6,
```

```
                                                    "rbSubscriptionPlanItemQuantity" : 200,
                                                                "rbSubscriptionPlanItemRate" : 6
.50,
                                                                "rbSubscriptionPlanItemDiscount"
 : 10.0
                                                  }]
                                }]
}
```


Sample Response:


```
{
    "rbSalesOrder": "350",
    "rbCustomer": {
        "name": "Johnson",
        "id": "3"
    }
}
```


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rbCreateSubscriptionFromOrder

Use this method to create a subscription sales order with the Subscription Billing – Sales Order custom form. You can set the sales order form to be used for Recurring Billing Integration in the **SO Form for Plugin** field on the Subscription Billing Preferences page. For more information, see Setting Up Recurring Billing Preferences.

This method creates sales order with an approved status, and automatically generates a subscription from the approved sales order.

Important Things to Note:

- Use the rbCreateSubscriptionFromOrder method if you use the Subscription Billing - Sales Order form (or a customized version of this custom form) to create subscription sales orders. To create subscriptions using the standard sales order form, use the rbCreateStandardSalesOrder method.
- You cannot set the status of the sales order when you use the rbCreateSubscriptionFromOrder method. If you want to be able to set the sales order status, use the rbCreateSalesOrder or rbCreateStandardSalesOrder method.
- For sales orders created through Recurring Billing Integration, the maximum recommended limit is 150 line items per sales order without custom fields. Sales order transactions with more line items may result in performance issues.
- For subscriptions with Fixed Date billing mode, you can add the `rbCustomTransactionBodyFields` object in the request to set the Fixed Billing Date field value. Make sure that you have set up valid fixed billing dates prior to sending a request. For information about setting up fixed billing dates, see Setting Up Fixed Billing Dates.

  You can also use rbCreateSalesOrder to create a sales order with a Pending Approval status, then you can edit the created sales order to assign a fixed billing date for the subscription.
- The rbCreateSubscriptionFromOrder method runs a user event script to create a sales order. A user event script cannot be executed by other user event scripts, so you will get an error when you reference this method inside a user event script.

- Customer creation currently only supports company type customers.

Parameters

- `rbCustomer` [required] – Internal ID of an existing customer or an object with the following properties:

  > **Important:** An error will be returned if a customer is marked as taxable and the tax codes are not set up correctly.
  >
  > You can choose to have NetSuite automatically determine the correct tax code for a customer based on their shipping address. To do this, go to Setup > Accounting > Set Up Taxes. Check the **Enable Tax Lookup on Sales Transactions** box and click **Save**.

  - `customerName` [required] – Name of the customer
  - `customerSubsidiary` [required for NetSuite OneWorld accounts only] – Internal ID of the subsidiary
  - `customerURN` [optional] – External ID of the customer

    > **Note:** If the external ID provided is already associated with an existing customer, that existing customer record will be used and all other optional parameters in the rbCustomer object will be disregarded. Otherwise, a new customer record will be created.

  - `customerCardDetails` [optional] – Details of the customer credit card to be used. If credit card details are provided, the default transaction type is cash sale. Otherwise, transaction type is invoice.
    - `cardNumber` [required] – Credit card number
    - `cardName` [required] – Name on the credit card
    - `cardExpireDate` [required] – Credit card expiry date in MM/YYYY format (with no day component)
    - `cardType` [required] – A valid number for a card type that has been specified in the NetSuite account
  - `customerAddress` [optional] – Address of the customer

    > **Note:** You can only specify one address per customer.
    >
    > Make sure that you enter correct values for the following optional address fields. The system does not return an error when invalid values are entered dynamically on the address record.

    - `addressLabel` [optional]
    - `address1` [optional]
    - `address2` [optional]
    - `address3` [optional]
    - `addressCity` [optional]
    - `addressStateProvince` [optional]
    - `addressZip` [optional]
    - `addressCountry` [optional]
  - `rbCustomerContact` [optional] – Details of the contact person for the customer

> **Note:** You can only specify one contact per customer.

- `contactFirstName` [required]
- `contactLastName` [optional]
- `contactEmail` [optional]
- `contactTitle` [optional]
- `contactPhone` [optional]
- `contactSalutation` [optional]
- `contactAddress` [optional]

> **Note:** You can only specify one address per customer contact.
>
> Make sure that you enter correct values for the following optional address fields. The system does not return an error when invalid values are entered dynamically on the address record.

  - `addressLabel` [optional]
  - `address1` [optional]
  - `address2` [optional]
  - `address3` [optional]
  - `addressCity` [optional]
  - `addressStateProvince` [optional]
  - `addressZip` [optional]
  - `addressCountry` [optional]

- `rbTimezone` [optional] – ID for timezone. If this is not provided, the timezone specified on the Subscription Billing Preferences page is used.

> **Note:** rbTimezone becomes a required parameter if no default timezone is specified on the Subscription Billing Preferences page. For information about setting up Recurring Billing preferences, see Setting Up Recurring Billing Preferences.

- `rbOrderURN` [optional] – External ID of the sales order, entered in string data format. Value must be unique.
- `rbCustomTransactionBodyFields` [optional] – Object that contains key/value pairs to set the values for non-Recurring Billing custom transaction body fields. Use the field ID as the key, and the field value as the value.

  You can also use this object to set the value for the Fixed Billing Date (custbody_sb_fixed_billing_date_so) field.

> **Note:** When setting the value for the Fixed Billing Date field, make sure that you have set up valid fixed billing dates prior to sending a request. For more information, see Setting Up Fixed Billing Dates. Make sure to specify the fixed billing date in the date format set in the user preferences.

- `rbOrderDetails` [required] – An array of objects used to add a subscription item to a sales order
  - `rbItem` [required] – Internal ID of the lead item
  - `rbSubscriptionPlan` [required] – Internal ID of the subscription plan

- `rbSubscriptionStartAt` [required] – Start date for the subscription. Date must be specified using the date format set in the user preferences.
- `rbCustomTransactionColumnFields` [optional] – Object that contains key/value pairs to set the values for non-Recurring Billing custom transaction column fields. Use the field ID as the key, and the field value as the value.
- `rbSubscriptionEndAt` [optional] – Custom end date for the subscription. Date must be specified using the date format set in the user preferences. Custom end date must not be less than one rating period from the start date (based on the selected subscription plan's rating frequency) and not more than 120 months from the start date. Take note of the following:
  - If this parameter is not included in the request, the end date is set to the default end date, which is determined based on the start date that you specified and the selected subscription plan's term.
  - If this parameter is included in the request:
    - If the end date value is set to blank, the subscription item will have a Perpetual term.
    - If the end date that you specified is equal to the default end date, the subscription item will follow the original term on the subscription plan.
    - If the end date that you specified is not equal to the default end date, the subscription item will have a Custom Term.

    > **Note:** If the original term on the subscription plan is less than 48 months (that is, minimum term has not been set previously), and the custom end date results to a custom term that is more than 36 months, a default minimum term of 36 months is set for the subscription item. Also, the notice period value from the subscription plan is used if the resulting custom term is more than 36 months.
    >
    > For subscription plans with renewal settings, if the subscription item is originally created with a custom end date, the term upon renewal will still follow the renewal settings from the subscription plan (not the custom term).
    >
    > For co-term, you can set a custom end date only if `rbSubscriptionCotermination` is set to **1** (Add new item but no co-term alignment) .

- `rbSubscriptionPlanDiscount` [optional] – Plan-level percentage discount to be used
- `rbSubscriptionOption` [optional] – Internal ID of the subscription option

Internal ID	Subscription Option	Description
1	New subscription (default)	Creates a new subscription from the sales order.
2	Add to existing, align with current billing close and prorate	Adds a sales order item to an existing subscription and adjusts its billing date to align with the current billing cycle of the subscription. Proration will be applied to charges that fall within the current billing cycle.
3	Add to existing, align with next billing cycle start with no proration	Adds a sales order item to an existing subscription and adjusts its billing date to align with the next billing cycle of the subscription. No proration will be applied to charges that fall outside of the next billing cycle.

- `rbSubscription` [required if rbSubscriptionOption is 2 or 3] – Internal ID of the existing subscription where you want to add an item. This parameter is processed only if any of the add to existing subscription options is selected, that is, if the value of rbSubscriptionOption is 2 or 3.
- `rbSubscriptionTransactionType` [optional] – Internal ID of the transaction type

Internal ID	Transaction Type
1	Invoice (default if the rbSubscriptionTransactionType parameter is not specified)
2	Cash sale (default if credit card details are provided)

- `rbSubscriptionLocation` [required if the Locations feature is enabled on the account] – Internal ID for the location
- `rbSubscriptionDepartment` [required if the Departments feature is enabled on the account] – Internal ID for the department
- `rbSubscriptionClass` [required if the Classes feature is enabled on the account] – Internal ID for the class
- `rbSubscriptionCotermination` [optional] – Internal ID of the co-term option. Co-term enables you to align the end dates of subscription items when adding items to an existing subscription. This object is processed only if rbSubscription is specified.

Internal ID	Co-term Option	Description
1	Add new item but no co-term alignment (default)	Adds a new item to an existing subscription without aligning the end dates.
2	Align new item's co-term with existing subscription	Adds a new item and aligns its end date to the existing subscription item's end date. **Note:** You can align multiple items to the same existing item. A newly added item's end date can only be truncated.
3	Align existing item's co-term with newly added item	Adds a new item to an existing subscription and aligns the existing subscription item's end date to the new item's end date. **Note:** You can co-term an existing item with a newly added item only one time (1:1). An existing item's end date can only be extended.

> **Note:** For perpetual items, the only valid co-term option is to add the new item but no co-term alignment (that is, rbSubscriptionCotermination is 1).

- `rbSubscriptionCoterminationItem` [required if rbSubscriptionCotermination is 2 or 3] – Internal ID of the co-term item
- `rbSubscriptionItemStartType` [optional] – Internal ID of the item start type. If not provided, the item start type defaults to Immediate (1) and the subscription item will be created with a status of Open or Pending, depending on the subscription item start date.

Internal ID	Subscription Item Start Type	Description
1	Immediate (default)	Creates a subscription item with a status of Open. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Open when the start date is equal to the current date.
2	Suspended	Creates a subscription item and sets its status to Suspended upon creation. If the item start date is a future date, the subscription item will initially have a status of Pending. Its status will change to Suspended when the start date is equal to the current date.

- `rbSubscriptionPlanItems` [optional] – An array of objects that can be used to override the default properties for the items within the parent subscription plan
  - `rbSubscriptionPlanItem` [required] – Internal ID of the subscription plan item
  - `rbSubscriptionPlanItemQuantity` [optional, but at least one adjustment must be specified] – New quantity for fixed usage items. This parameter is applicable only to fixed usage items. Value can be any positive value or zero.
  - `rbSubscriptionPlanItemDiscount` [optional, but at least one adjustment must be specified] – Percentage discount for the item. Value can any positive value up to 100, excluding zero. To apply discount, **Allow Line Discount** must be enabled on the subscription plan item record.
  - `rbSubscriptionPlanItemRate` [optional, but at least one adjustment must be specified] – Custom rate for an item that uses a single rate plan. Value can be a positive value, negative value, or zero. To apply custom rate, **Allow Custom Rate** must be enabled on the subscription plan item record.
  - `rbSubscriptionPlanItemRatePlans` [optional, but at least one adjustment must be specified] – An array of objects that can be used to specify custom rates for an item that uses multiple rate plans (that is, variable usage items).
    - `rbSubscriptionPlanItemRatePlan` – Internal ID of the rate plan
    - `rbSubscriptionPlanItemRatePlanRate` – Custom rate for the item. Value can be a positive value, negative value, or zero. To apply custom rate, **Allow Custom Rate** must be enabled on the subscription plan item record.

> **Note:** Specifying the rbSubscriptionPlanItems is similar to specifying custom pricing adjustments using the **Customize Subscription Price** button on the subscription sales order user interface. If you include rbSubscriptionPlanItems in the request, you are required to specify at least one custom pricing adjustment object.

Returns

- `rbSalesOrder` – Internal ID of the sales order
- `rbSubscription` – Internal ID of the subscription
- `rbSubscriptionDetails` – Details of the subscription, including:
  - `rbSubscriptionOption`
  - `rbSubscription`
  - `rbSubscriptionTransactionType`
  - `rbSubscriptionLocation`

- rbSubscriptionDepartment
- rbSubscriptionClass
- `rbCustomer` – ID and name of the customer

Example

Sample Request:

```
{
  "rbMethod":"rbCreateSubscriptionFromOrder",
  "rbCustomer":{
        "customerName": "Johnnie",
        "customerSubsidiary":1,
        "customerAddress": {
           "addressLabel" : "Office",
           "address1" : "The Red Barn",
           "address2" : "Potters Farm Business Park",
           "address3" : "Didcot Road",
           "addressCity" : "Witney",
           "addressStateProvince" : "Oxfordshire",
           "addressZip" : "OX10 2PP",
           "addressCountry" : "GB"
     },
        "rbCustomerContact":{
           "contactFirstName" : "Peter",
           "contactLastName" : "Jones",
           "contactSalutation" : "Mr.",
           "contactTitle" : "Engineer",
           "contactEmail" : "peter@pottersfarm.co.uk",
           "contactPhone" : "+6321234567",
           "contactAddress" : {
              "addressLabel" : "Factory",
              "address1" : "The Red Barn",
              "address2" : "Potters Farm Business Park",
              "address3" : "Didcot Road",
              "addressCity" : "Witney",
              "addressStateProvince" : "Oxfordshire",
              "addressZip" : "OX10 2PP",
              "addressCountry" : "GB"
            }
     },
        "customerCardDetails": {
           "cardNumber" : "5555555555554444",
           "cardType": 4,
           "cardName" : "JohnnieWalker",
           "cardExpireDate" : "12/2014"
        }
     },
  "rbOrderDetails" : [{"rbItem": 6,
                   "rbSubscriptionPlan": 1,
                   "rbSubscriptionStartAt": "10/12/2013",
                   "rbSubscriptionItemStartType": 1,
                   "rbSubscriptionPlanDiscount": 23,

                   "rbSubscriptionOption" : 1,
```

```
                    "rbSubscriptionTransactionType" : 1,

                    "rbSubscriptionPlanItems" : [{"rbSubscriptionPlanItem": 3,
                                                   "rbSubscriptionPlanItemQuantity" : 200,
                                                   "rbSubscriptionPlanItemRate" : 6.50,
                                                   "rbSubscriptionPlanItemDiscount" : 10.0
                                                 },{
                                                   "rbSubscriptionPlanItem" : 64,
                                                   "rbSubscriptionPlanItemDiscount" : 10.0,
                                                   "rbSubscriptionPlanItemRatePlans" :
                                                   [{
                                                      "rbSubscriptionPlanItemRatePlan" : 3,
                                                      "rbSubscriptionPlanItemRatePlanRate" : 6.
50,
                                                    }
                                                    {
                                                      "rbSubscriptionPlanItemRatePlan" : 16,
                                                      "rbSubscriptionPlanItemRatePlanRate" : 4.
50

                                                    }]
                                  }]
                    }]
}
```

Sample Response:

```
{
    "rbSalesOrder": "3216",
    "rbSubscription": "1415",
    "rbSubscriptionDetails": {
        "rbSubscriptionOption": {
            "id": "1",
            "name": "New Subscription"
        },
        "rbSubscription": {
            "id": "1415",
            "name": "_2014-04-01"
        },
        "rbSubscriptionTransactionType": {
            "id": "1",
            "name": "Invoice"
        },
        "rbSubscriptionLocation": {
            "id": "",
            "name": ""
        },
        "rbSubscriptionDepartment": {
            "id": "",
            "name": ""
        },
        "rbSubscriptionClass": {
            "id": "",
            "name": ""
        }
    },
```

```
    "rbCustomer": {
        "name": "Johnnie",
        "id": "507"
    }
}
```

Back to Supported Methods

rbCreateSubscriptionPlan

Use this method to create a new subscription plan with subscription plan items and options for renewal.

Parameters

- `rbSubscriptionPlan` [required] – An array of objects used to create a subscription plan
  - `rbSubscriptionPlanName` [required] – Name of the subscription plan
  - `rbSubscriptionPlanItem` [required] – Internal ID of the lead item or the item that will be used as the primary item for the subscription
  - `rbSubscriptionPlanStartDate` [optional] – Effective date when the subscription plan becomes available. Date must be specified using the date format set in the user preferences. If this is not provided, default start date is current date.
  - `rbSubscriptionPlanEndDate` [optional] – Date after which the subscription plan can no longer be used. Date must be specified using the date format set in the user preferences.
  - `rbSubscriptionPlanSubsidiary` [required for NetSuite OneWorld accounts only] – Internal ID of the subsidiary to which transactions from subscriptions that will use this subscription plan will be posted
  - `rbSubscriptionPlanIsDefault` [optional] – If this is not provided, default value is false (F). If you want to make this subscription plan the default subscription plan for the lead item, set the value to true (T).
  - `rbSubscriptionPlanTerm` [required] – Internal ID of the subscription plan term. Term determines the number of months that the subscription item will be effective.

Internal ID	Term
1	Perpetual
2	3 months
3	6 months
4	12 months
5	18 months
6	24 months
7	36 months
8	48 months
9	60 months
10	72 months
11	84 months
12	96 months

Internal ID	Term
13	108 months
14	120 months

- `rbSubscriptionPlanBillMode` [required] – Internal ID of the billing mode

Internal ID	Billing Mode	Description
1	Anniversary	Select this option if you want the item to be billed on the day the customer signs up for the subscription.
2	Fixed Date	Select this option if you want the item to be billed on a specific billing date.

- `rbSubscriptionPlanTermMethod` [required] – Internal ID of the termination method

Internal ID	Termination Method	Description
1	End of billing period	Select this option if you want the subscription to be terminated at the end of the billing period immediately following the date of cancellation.
2	Upon cancellation	Select this option if you want the subscription to be terminated on the day of cancellation.

- `rbSubscriptionPlanMinimumTerm` [required if rbSubscriptionPlanTerm is set to 48 months or longer] – Internal ID of the minimum term. This object determines the number of initial charges that will be created for the subscription plan. This request object will be processed only if rbSubscriptionPlanTerm is set to 48 months or longer. Otherwise, it will be ignored.

Internal ID	Term
2	3 months
3	6 months
4	12 months
5	18 months
6	24 months
7	36 months

- `rbSubscriptionPlanNoticePeriod` [optional] – Minimum number of future charges that must always be available for the item. This request object will be processed only if rbSubscriptionPlanTerm is set to 48 months or longer. Otherwise, it will be ignored.
- `rbSubscriptionPlanCoTermMethod` [optional] – Internal ID of the default co-term option when the lead item is selected in a sales order. This request object will be processed only if rbSubscriptionPlanTerm is non-perpetual. If rbSubscriptionPlanTerm is set to perpetual, this request object will be ignored.

Internal ID	Co-term Option	Description
1	Add new item but no co-term alignment (default)	Adds a new item to an existing subscription without aligning the end dates.
2	Align new item's co-term with existing subscription	Adds a new item and aligns its end date to the existing subscription item's end date.

Internal ID	Co-term Option	Description
3	Align existing item's co-term with newly added item	Adds a new item to an existing subscription and aligns the existing subscription item's end date to the new item's end date.

- `rbSubscriptionPlanCurrency` [required if the Multiple Currencies feature is enabled] – Internal ID of the currency that will be used. If the Multiple Currencies feature is enabled, this request object is mandatory and entering an invalid value returns an error. If the Multiple Currencies feature is disabled, any value you specify is ignored and the value for this request object defaults to the base currency set in the company information.
- `rbSubscriptionPlanIsApproved` [optional] – If not provided, default value is false (F)—the subscription plan will be created with a status of Prepare and it can only be made available manually through the Request Approval button in the UI. To set the status of the subscription plan to Available (or Approved if rbSubscriptionPlanStartDate is set to a future date) upon creation, set the value to true (T).
- `rbRenewal` [optional] – Objects used to set the renewal options for the subscription plan. This parameter is processed only if rbSubscriptionPlanTerm is non-perpetual. If rbSubscriptionPlanTerm is set to perpetual, this request parameter and all objects inside will be ignored.
  - `rbSubscriptionPlanRenewalAction` [optional] – Internal ID of the renewal action for the subscription plan. A renewal action occurs 30 days before the subscription item's end date.

    > **Note:** Other request objects inside rbRenewal will be processed only if a value for rbSubscriptionPlanRenewalAction is specified. If rbSubscriptionPlanRenewalAction is null or blank, all other request objects inside rbRenewal will be ignored.

Internal ID	Renewal Action	Description
1	Automatically renew	Select this option if you want to set up automatic renewal of the subscription items.
2	Await customer acceptance	Select this option if you want to set up subscription item renewal upon customer approval.
3	Create transaction	Select this option if you want to create a sales opportunity from terminated subscription items.

  - `rbRenewalMigrate` [optional] – If not provided, default value is false (F). If you want to migrate the subscription item to a new plan upon renewal, set the value to true (T).
  - `rbRenewalMigrateToPlan` [required if rbRenewalMigrate is set to true (T)] – Internal ID of the new subscription plan where the subscription item will be migrated upon renewal. This request object will be processed only if rbRenewalMigrate is set to true. Otherwise, it will be ignored.
  - `rbRenewalTerm` [required if a value for rbSubscriptionPlanRenewalAction is specified] – Internal ID of the term upon renewal

Internal ID	Term
1	Perpetual
2	3 months
3	6 months

Internal ID	Term
4	12 months
5	18 months
6	24 months
7	36 months
8	48 months
9	60 months
10	72 months
11	84 months
12	96 months
13	108 months
14	120 months

- `rbRenewalMinimumTerm` [required if rbRenewalTerm is set to 48 months or longer] – Internal ID of the minimum term upon renewal. This request object will be processed only if rbRenewalTerm is set to 48 months or longer. Otherwise, it will be ignored.

Internal ID	Term
2	3 months
3	6 months
4	12 months
5	18 months
6	24 months
7	36 months

- `rbRenewalNoticePeriod` [optional] – Minimum number of future charges that must always be available for the item. This request object will be processed only if rbRenewalTerm is set to 48 months or longer. Otherwise, it will be ignored.
- `rbRenewalTerminateIfNotRenewed` [optional] – If not provided, default value is false (F). Set the value to true (T) if you want the billing system to automatically terminate the subscription item if the customer has not acted on the renewal notification after the number of days you specified in the rbRenewalDaysInAdvance has lapsed. This request object will be processed only if rbSubscriptionPlanRenewalAction is set to await customer acceptance (2) or create transaction (3). Otherwise, it will be ignored.
- `rbRenewalTerminateAfterDays` [required if rbRenewalTerminateIfNotRenewed is set to true (T)] – Number of days after which the subscription item will automatically be terminated if the customer has not acted on the renewal notification. This request object will be processed only if rbRenewalTerminateIfNotRenewed is set to true (T) and rbSubscriptionPlanRenewalAction is set to await customer acceptance (2) or create transaction (3). Otherwise, it will be ignored.
- `rbRenewalDaysInAdvance` [required if rbSubscriptionPlanRenewalAction is set to create transaction (3)] – Number of days before the end date when the billing system will create a sales opportunity. This request object will be processed only if rbSubscriptionPlanRenewalAction is set to create transaction (3). Otherwise, it will be ignored. Value can only be set from 0 through 30.

  - `rbRenewalAssignTo` [required if rbSubscriptionPlanRenewalAction is set to create transaction (3)] – Internal ID of the sales person (employee record) to whom the renewal sales opportunity will be assigned. This request object will be processed only if rbSubscriptionPlanRenewalAction is set to create transaction (3). Otherwise, it will be ignored.
- `rbSubscriptionPlanItems` [required] – An array of objects used to add subscription plan items to a subscription plan
  - `rbSubscriptionPlanItemItem` [required] – Internal ID of the item that will be sold as a subscription plan item within the subscription plan.

    Important: The current version of the Recurring Billing SuiteApp only supports subscriptions on non-inventory items for sale or resale and services for sale or resale. If you specify an unsupported item, an error will be returned and the subscription plan will not be created.

  - `rbSubscriptionPlanItemCategory` [optional] – Internal ID of the category for the subscription plan item
  - `rbSubscriptionPlanItemSubCategory` [optional] – Internal ID of the sub-category for the subscription plan item
  - `rbSubscriptionPlanItemBillMethod` [required] – Internal ID of the billing method for the item

Internal ID	Billing Method	Description
1	Advance	Select this option if you want to bill the item on the first day of the billing cycle.
2	Arrears	Select this option if you want to bill the item after the end of the billing cycle.

  - `rbSubscriptionPlanItemChargeType` [required] – Internal ID of the subscription plan item charge type.

Internal ID	Charge Type	Description
2	Recurring Service	Select this option if the item is a recurring service.
3	Variable Usage	Select this option if the item is usage-based with usage amounts that may vary per rating period.
4	Termination Fee	Select this option if the item is used as line entries for early termination penalties or charges.
5	Fixed Usage	Select this option if the item is usage-based with fixed usage amounts.

  - `rbSubscriptionPlanItemBillFrequency` [required] – Internal ID of the billing frequency. Billing frequency determines when you want the billing system to generate an invoice entry for the item.

Internal ID	Billing Frequency
4	Monthly
6	Quarterly

Internal ID	Billing Frequency
7	Semi-Annually
8	Yearly
9	18 Months
10	Biennial
11	Triennial

- `rbSubscriptionPlanItemRatingFrequency` [required] – Internal ID of the rating frequency. Rating frequency determines the period or frequency for the specified rate.

> **Important:** rbSubscriptionPlanItemBillFrequency and rbSubscriptionPlanItemRatingFrequency must be set to the same value, unless rbSubscriptionPlanItemChargeType is set to recurring service (2). If rbSubscriptionPlanItemChargeType is not set to recurring service and you specify different values for billing and rating frequencies, an error will be returned and the subscription plan will not be created.
>
> You can set different billing and rating frequencies only for recurring service items. If you are setting different values for these fields, the billing frequency must be less than or equal to the rating frequency (in months), and the rating frequency must be divisible by the billing frequency (without a remainder).

Internal ID	Rating Frequency
4	Monthly
6	Quarterly
7	Semi-Annually
8	Yearly
9	18 Months
10	Biennial
11	Triennial

- `rbSubscriptionPlanItemIncludeInTRA` [optional] – If not provided, default value is false (F). If you want to include the amount of the item based on the rate plan to the total recurring amount, set the value to true (T). This request object will be processed only if rbSubscriptionPlanItemChargeType is set to recurring service (2). Otherwise, it will be ignored.
- `rbSubscriptionPlanItemRatePlan` [required] – Internal ID of a single rate plan or an array of internal IDs for multiple rate plans
- `rbSubscriptionPlanItemQuantity` [required if rbSubscriptionPlanItemChargeType is set to fixed usage (5)] – Number of fixed usage units to allocate to the subscription plan item per rating period. This request object will be processed only if rbSubscriptionPlanItemChargeType is set to fixed usage (5). Otherwise, it will be ignored.
- `rbSubscriptionPlanItemShowZero` [optional] – If not provided, default value is false (F). If you want to include the subscription item on the invoice even if the charge amount for the item is zero, set the value to true (T).
- `rbSubscriptionPlanItemAllowDiscount` [optional] – If not provided, default value is false (F). If you want to allow line discounting for the subscription plan item, set the value to

true (T). This request object will be processed only if rbSubscriptionPlanItemChargeType is set to recurring service (2), variable usage (3), or fixed usage (5). Otherwise, it will be ignored.

- `rbSubscriptionPlanItemAllowCustomRate` [optional] – If not provided, default value is false (F). If you want to allow specifying a custom rate for the subscription plan item, set the value to true (T).
- `rbSubscriptionPlanItemAllowItemUplift` [optional] – If not provided, default value is false (F). If you want to allow price uplift for the subscription plan item, set the value to true (T). This request object will be processed only if rbSubscriptionPlanItemChargeType is set to recurring service (2), variable usage (3), or fixed usage (5). Otherwise, it will be ignored.
- `rbSubscriptionPlanItemProrateFeeOnSale` [optional] – If not provided, default value is false (F). If you want to apply proration on a new recurring service or fixed usage item, set the value to true (T). This request object will be processed only if rbSubscriptionPlanItemChargeType is set to recurring service (2) or fixed usage (5). Otherwise, it will be ignored.
- `rbSubscriptionPlanItemProrateUsageOnSale` [optional – If not provided, default value is false (F). If you want to apply proration on the included usage of a new variable usage item, set the value to true (T). This request object will be processed only if rbSubscriptionPlanItemChargeType is set to variable usage (3). Otherwise, it will be ignored.
- `rbSubscriptionPlanItemProrateFeeOnTermination` [optional] – If not provided, default value is false (F). Set the value to true (T) if you want to apply proration on a termination fee item, or on a recurring service or fixed usage item with termination method set to upon cancellation. This request object will be processed only if rbSubscriptionPlanItemChargeType is set to termination fee (4), or if rbSubscriptionPlanItemChargeType is set to recurring service (2) or fixed usage (5) with rbSubscriptionPlanTermMethod set to upon cancellation (2). Otherwise, it will be ignored.
- `rbSubscriptionPlanItemProrateUsageOnTermination` [optional] – If not provided, default value is false (F). If you want to apply proration on the included usage of a terminated variable usage item, set the value to true (T). This request object will be processed only if rbSubscriptionPlanItemChargeType is set to variable usage (3). Otherwise, it will be ignored.
- `rbSubscriptionPlanItemOffset` [required] – Number of rating periods from the subscription start date when the subscription item starts. If this object is omitted from the request, value for offset defaults to zero. If this object is included in the request but the value is set to blank, an error is returned.
- `rbSubscriptionPlanItemDuration` [required if rbSubscriptionPlanItemChargeType is set to termination fee (4)] – Number of rating periods that the subscription plan item is active

Returns

- `rbSubscriptionPlan` – Internal ID and name of the subscription plan created
- `rbSubscriptionPlanStatus` – Internal ID and name of the subscription plan status

Example

Sample Request:

```
{
   "rbMethod":"rbCreateSubscriptionPlan",
   "rbSubscriptionPlan": {
     "rbSubscriptionPlanName": "Test_Create_SB_DiffCurr_61",
          "rbSubscriptionPlanItem": 105,

          "rbSubscriptionPlanStartDate": "06/04/2014",
          "rbSubscriptionPlanEndDate": "06/20/2015",
```

```
        "rbSubscriptionPlanSubsidiary": 1,
        "rbSubscriptionPlanIsDefault": "T",
        "rbSubscriptionPlanTerm": 4,

        "rbSubscriptionPlanMinimumTerm": 2,
        "rbSubscriptionPlanNoticePeriod": 1,
        "rbSubscriptionPlanCoTermMethod": 2,

        "rbSubscriptionPlanBillMode": 1,
        "rbSubscriptionPlanTermMethod": 1,
        "rbSubscriptionPlanCurrency": 1,

        "rbSubscriptionPlanIsApproved": "T",

        "rbRenewal": {
                "rbSubscriptionPlanRenewalAction": 3,
                "rbRenewalMigrate": "F",

                "rbRenewalTerm": 12,
                "rbRenewalMinimumTerm": 4,
                "rbRenewalNoticePeriod": 7,

                "rbRenewalTerminateIfNotRenewed": "T",
                "rbRenewalTerminateAfterDays": 12,

                "rbRenewalDaysInAdvance": 2,
                "rbRenewalAssignTo": 1511

    },

       "rbSubscriptionPlanItems": [{
                "rbSubscriptionPlanItemItem": 112,
                "rbSubscriptionPlanItemBillMethod": 1,
                "rbSubscriptionPlanItemBillFrequency": 4,
                "rbSubscriptionPlanItemRatingFrequency": 4,
                "rbSubscriptionPlanChargeType": 4,
                "rbSubscriptionPlanItemRatePlan": [5],

                "rbSubscriptionPlanItemDuration": "3",
                "rbSubscriptionPlanItemCategory": 1,
                "rbSubscriptionPlanItemSubCategory": 2,
                "rbSubscriptionPlanItemIncludeInTRA": "F",
                "rbSubscriptionPlanItemQuantity": "+100.325416",
                "rbSubscriptionPlanItemShowZero": "T",
                "rbSubscriptionPlanItemAllowDiscount": "F",
                "rbSubscriptionPlanItemAllowCustomRate": "F",
                "rbSubscriptionPlanItemAllowItemUplift": "F",
                "rbSubscriptionPlanItemProrateFeeOnSale": "T",
                "rbSubscriptionPlanItemProrateUsageOnSale": "F",
                "rbSubscriptionPlanItemProrateFeeOnTermination": "T",
                "rbSubscriptionPlanItemProrateUsageOnTermination": "F",
                "rbSubscriptionPlanItemOffset": 2,

      },{
                "rbSubscriptionPlanItemItem": 106,
```

```
                "rbSubscriptionPlanItemBillMethod": 1,
                "rbSubscriptionPlanItemBillFrequency": 4,
                "rbSubscriptionPlanItemRatingFrequency": 4,
                "rbSubscriptionPlanChargeType": 2,
                "rbSubscriptionPlanItemRatePlan": [5],

                "rbSubscriptionPlanItemDuration": "3",
                "rbSubscriptionPlanItemCategory": 1,
                "rbSubscriptionPlanItemSubCategory": 2,
                "rbSubscriptionPlanItemIncludeInTRA": "T",
                "rbSubscriptionPlanItemQuantity": "+100.325416",
                "rbSubscriptionPlanItemShowZero": "T",
                "rbSubscriptionPlanItemAllowDiscount": "T",
                "rbSubscriptionPlanItemAllowCustomRate": "T",
                "rbSubscriptionPlanItemAllowItemUplift": "T",
                "rbSubscriptionPlanItemProrateFeeOnSale": "T",
                "rbSubscriptionPlanItemProrateUsageOnSale": "F",
                "rbSubscriptionPlanItemProrateFeeOnTermination": "T",
                "rbSubscriptionPlanItemProrateUsageOnTermination": "F",
                "rbSubscriptionPlanItemOffset": 2,

        },{
                "rbSubscriptionPlanItemItem": 107,
                "rbSubscriptionPlanItemBillMethod": 1,
                "rbSubscriptionPlanItemBillFrequency": 4,
                "rbSubscriptionPlanItemRatingFrequency": 4,
                "rbSubscriptionPlanChargeType": 5,
                "rbSubscriptionPlanItemRatePlan": [6],

                "rbSubscriptionPlanItemDuration": "5",
                "rbSubscriptionPlanItemCategory": 1,
                "rbSubscriptionPlanItemSubCategory": 2,
                "rbSubscriptionPlanItemIncludeInTRA": "F",
                "rbSubscriptionPlanItemQuantity": "0.000123",
                "rbSubscriptionPlanItemShowZero": "T",
                "rbSubscriptionPlanItemAllowDiscount": "T",
                "rbSubscriptionPlanItemAllowCustomRate": "T",
                "rbSubscriptionPlanItemAllowItemUplift": "T",
                "rbSubscriptionPlanItemProrateFeeOnSale": "T",
                "rbSubscriptionPlanItemProrateUsageOnSale": "F",
                "rbSubscriptionPlanItemProrateFeeOnTermination": "T",
                "rbSubscriptionPlanItemProrateUsageOnTermination": "F",
                "rbSubscriptionPlanItemOffset": 1,

        },{
                "rbSubscriptionPlanItemItem": 109,
                "rbSubscriptionPlanItemBillMethod": 1,
                "rbSubscriptionPlanItemBillFrequency": 4,
                "rbSubscriptionPlanItemRatingFrequency": 4,
                "rbSubscriptionPlanChargeType": 3,
                "rbSubscriptionPlanItemRatePlan": [6],

                "rbSubscriptionPlanItemDuration": "3",
                "rbSubscriptionPlanItemCategory": 1,
                "rbSubscriptionPlanItemSubCategory": 2,
```

```
                        "rbSubscriptionPlanItemIncludeInTRA": "F",
                        "rbSubscriptionPlanItemQuantity": "+100.325416",
                        "rbSubscriptionPlanItemShowZero": "T",
                        "rbSubscriptionPlanItemAllowDiscount": "T",
                        "rbSubscriptionPlanItemAllowCustomRate": "T",
                        "rbSubscriptionPlanItemAllowItemUplift": "T",
                        "rbSubscriptionPlanItemProrateFeeOnSale": "F",
                        "rbSubscriptionPlanItemProrateUsageOnSale": "T",
                        "rbSubscriptionPlanItemProrateFeeOnTermination": "F",
                        "rbSubscriptionPlanItemProrateUsageOnTermination": "T",
                        "rbSubscriptionPlanItemOffset": 2,

         }]
     }
}
```


Sample Response:


```
{
   "rbSubscriptionPlan": {
      "id": "10714",
      "name": "Test_Create_SB_DiffCurr_61"
   },
   "rbSubscriptionPlanStatus": {
      "id": "5",
      "name": "Available"
   }
}
```


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rbCreateUsageData

Use this method to create usage data records. Usage data is used as basis for computing charges for usage-based items.

The rating engine uses the service date, usage unit, and usage quantity fields as the default filters when processing usage data records.

You can set additional default usage search criteria to be used by the rating engine for filtering customer usage data prior to processing them for rating. From the UI, go to Subscription Billing > Account Setup > Subscription Billing Preferences. On the Rating Defaults subtab, check the corresponding box for the default usage search criteria that you want to enable:

- Customer ID
- Subscription ID
- Secondary Subscription Item ID
- Item ID

For more information on the default usage search criteria preferences, see Default Usage Search Criteria.

Parameters

- `rbUsageData` [required] – An array of objects used to create a new usage data record

- `rbCustomer` [optional but at least one parameter must be specified in the header] – Internal ID of the customer
- `rbSubscriptionAgreement` [optional but at least one parameter must be specified in the header] – Internal ID of the subscription. rbCustomer must also be specified, otherwise, an error will be returned and the usage data record will not be created.

> **Note:** The rbSubscriptionAgreement request object (and the corresponding Subscription ID field in the UI) currently does not have a validation for subscription status. You can enter any subscription, regardless of its status. However, only usage data linked to subscriptions with a status of Open or Suspended will be picked up by the rating engine.

- `rbSubscriptionItem` [optional but at least one parameter must be specified in the header] – Internal ID of the ratable item (secondary subscription item). rbCustomer and rbSubscriptionAgreement must also be specified, otherwise, an error will be returned and the usage data record will not be created.

> **Note:** The rbSubscriptionItem request object (and the corresponding Secondary Subscription Item ID field in the UI) currently does not have a validation for subscription item status. You can enter any subscription item, regardless of its status. However, only usage data linked to subscription items with a status of Open, Suspended, Pending Termination, Pending Renewal, or Pending Migration will be picked up by the rating engine.

- `rbItem` [optional but at least one parameter must be specified in the header] – Internal ID of the item

> **Note:** The current version of the Recurring Billing SuiteApp only supports subscriptions on non-inventory items for sale or resale and services for sale or resale. The rbItem request object (and the corresponding Item ID field in the UI) currently does not have a validation where only supported items are accepted. Entering or selecting an unsupported item is allowed but the usage data will not be picked up by the rating engine because the item is not supported in subscription plans.

- `rbService` [optional but at least one parameter must be specified in the header] – Internal ID of the service record
- `rbUsageDataItems` [required] – An array of objects used to define usage data items
  - `rbUsageDataItemUnit` [required] – Internal ID of the usage unit
  - `rbUsageDataItemServiceType` [optional] – Category of the service purchased by a customer
  - `rbUsageDataItemStartDate` [optional] – Date when the usage event started. Date must be specified using the date format set in the user preferences. Start date must be earlier than or equal to the end date, if both specified.
  - `rbUsageDataItemEndDate` [optional] – Date when the usage event ended. Date must be specified using the date format set in the user preferences.

    > **Important:** Recurring Billing Integration contains some known issues for date fields that have date and time components. Make sure that start and end dates are provided in the date format set in the user preferences to avoid incorrect date and time settings.

  - `rbUsageDataItemQuantity` [required] – Quantity of usage unit used by the customer during the rating period

- `rbUsageDataItemDescription` [optional] – Description of the usage item and its terms
- `rbUsageDataItemCost` [optional] – Cost incurred from a third party
- `rbUsageDataItemRatableCost` [optional] – Difference between the cost incurred from a third party and the cost incurred for rating purposes
- `rbUsageDataItemRecordId` [optional] – Unique identifier of the usage record

Returns

- `rbUsageDataItems` – An array of usage data record IDs

> **Note:** If a validation error occurred from an invalid parameter in the header, an error response is returned.
>
> Error messages that are thrown from the rbUsageDataItem level are not returned as a response. Instead, they can be found on the logs and the response for rbUsageDataItem index returns -1.

Example

Sample Request:

```
{
   "rbMethod": "rbCreateUsageData",
   "rbUsageData": {
       "rbCustomer": 106,
       "rbSubscriptionAgreement": 35,
       "rbSubscriptionItem": 2348,
       "rbItem": 205,
       "rbService": 1,
       "rbUsageDataItems": [
       {
           "rbUsageDataItemUnit":1,
           "rbUsageDataItemServiceType": 33,
           "rbUsageDataItemStartDate": "5/28/2014 4:08:00 pm",
           "rbUsageDataItemEndDate": "5/28/2014 4:08:00 pm",
           "rbUsageDataItemQuantity": 0.0011,
           "rbUsageDataItemDescription": 123,
           "rbUsageDataItemRatableCost": 0.15,
           "rbUsageDataItemCost": 1,
           "rbUsageDataItemRecordId": 1
       }]
   }
}
```

Sample Response:

```
{
   "rbUsageDataItems": ["1"]
}
```

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rbEvaluateChangeOrder

Use this method to evaluate the revenue impact if the specified subscription change order, with the specified properties, is to be executed.

> **Note:** Revenue impact is applicable to recurring service and fixed usage charge types.

Parameters

- `rbSubscription` [required] – Internal ID of the subscription
- `rbChangeAt` [required] – Effective date or execution date. Date must be specified using the date format set in the user preferences.
- *(change order object)* [required] – Change order object and additional request parameters associated with it. See list of Change Order Objects.

Returns

- rbSubscription – Internal ID of the subcription
- rbSubscriptionCurrency – ID and name of the currency used in the subscription
- rbChangeAt – Effective date or execution date
- rbChangeType – Type of subscription change order evaluated
- rbRevenueChanges – Revenue impact if the change is executed, including:
  - rbChangeRevenueTotal
  - rbChangeRevenueItems
    - rbSubscriptionItem
    - rbChangeRevenueTotal
    - rbChangeRevenueDetails
      - rbSubscriptionRevenue
      - rbSubscriptionPeriod
        - rbRatingPeriodStart
        - rbRatingPeriodEnd

> **Note:** A negative value in rbRevenueChanges denotes a loss while a positive value denotes a gain.

Change Order Objects

The following change order objects are supported in the rbEvaluateChangeOrder method.

Object	Description
rbMigrateSubscription	Evaluates the revenue impact of migrating a subscription from one subscription plan to a new subscription plan.
rbReactivate	Evaluates the revenue impact of reactivating a suspended subscription item.
rbSetFixedUsage	Evaluates the revenue impact of modifying the quantity of a fixed usage item within a subscription.
rbSetStartDate	Evaluates the revenue impact of modifying the start date a subscription.
rbSuspend	Evaluates the revenue impact of suspending a subscription item

Object	Description
rbTerminate	Evaluates the revenue impact of terminating a subscription item.

Important Things to Note:

- If the change order object is missing from the request property of the rbEvaluateChangeOrder method, an error will be returned.
- rbSubscriptionItem (additional parameter under the change order objects) must match the rbSubscription parameter in the rbEvaluateChangeOrder method.
- Whether or not the Prorate Fee on Sale option is checked on the subscription item record, rbEvaluateChangeOrder will always treat it as checked when evaluating a migrate subscription (rbMigrateSubscription), terminate subscription item (rbTerminate), or reactivate subscription item (rbReactivate) change order.

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rbMigrateSubscription

Use this object with the rbEvaluateChangeOrder method to evaluate the revenue impact of migrating a subscription from one subscription plan to a new subscription plan.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbTerminationFees` [required] – Internal ID of the termination fee option

Internal ID	Termination Fee Option
1	Maintain Original
2	Charge original and keep new plan’s
3	Charge original and do not keep new plan’s
4	Use new plan’s

> **Note:** If the new subscription plan contains only termination fee items, valid value for `rbTerminationFees` is only 2 (Charge original and keep new plan’s) or 4 (Use new plan’s).

- `rbNewSubscriptionPlan` [required] – Internal ID of the new subscription plan
- `rbChangeURN` [optional] – External ID of the change order
- `rbProrate` [optional] – If not provided, default value is false (F). To apply proration, change value to true (T).

> **Note:** For the new subscription plan, the value of the rbSubscriptionItem in the projected revenue changes will be null because the item ID is not yet created when rbEvaluateChangeOrder is performed. The item is identified by returning the subscription plan item ID in the rbSubscriptionPlanItem response object.

Example

Sample Request

```
{
  "rbMethod" : "rbEvaluateChangeOrder",
  "rbSubscription": 13,
```

```
  "rbChangeAt": "12/26/2013",
  "rbMigrateSubscription": [{
     "rbSubscriptionItem": 819,
     "rbTerminationFees" : 1,
     "rbNewSubscriptionPlan" : 8,
     "rbChangeURN": null
  }]
}
```

Sample Response

```
{
    "rbSubscription": 13,
    "rbSubscriptionCurrency": {
        "id": "1",
        "name": "USA"
    },
    "rbChangeAt": "12/26/2013",
    "rbChangeType": "rbMigrateSubscription",
    "rbRevenueChanges": [
        {
            "rbChangeRevenueTotal": -132.25806452000006,
            "rbChangeRevenueItems": [
                {
                    "rbSubscriptionItem": "820",
                    "rbChangeRevenueTotal": -1132.25806452,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": -32.25806452,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/26/2013",
                                "rbRatingPeriodEnd": "1/4/2014"
                            }
                        },
                        ...
                        {
                            "rbSubscriptionRevenue": -100,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "11/5/2014",
                                "rbRatingPeriodEnd": "12/4/2014"
                            }
                        }
                    ]
                },
                {
                    "rbSubscriptionItem": "823",
                    "rbChangeRevenueTotal": -283.06451613,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": -8.06451613,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/26/2013",
                                "rbRatingPeriodEnd": "1/4/2014"
                            }
                        },
```

```
                    ...
                    {
                        "rbSubscriptionRevenue": -25,
                        "rbSubscriptionPeriod": {
                            "rbRatingPeriodStart": "11/5/2014",
                            "rbRatingPeriodEnd": "12/4/2014"
                        }
                    }
                ]
            },
            {
                "rbSubscriptionItem": null,
                "rbSubscriptionPlanItem": "33",
                "rbChangeRevenueTotal": 283.06451613,
                "rbChangeRevenueDetails": [
                    {
                        "rbSubscriptionRevenue": 8.06451613,
                        "rbSubscriptionPeriod": {
                            "rbRatingPeriodStart": "12/26/2013",
                            "rbRatingPeriodEnd": "1/4/2014"
                        }
                    },
                    ...
                    {
                        "rbSubscriptionRevenue": 25,
                        "rbSubscriptionPeriod": {
                            "rbRatingPeriodStart": "11/5/2014",
                            "rbRatingPeriodEnd": "12/4/2014"
                        }
                    }
                ]
            },
            {
                "rbSubscriptionItem": null,
                "rbSubscriptionPlanItem": "30",
                "rbChangeRevenueTotal": 1000,
                "rbChangeRevenueDetails": [
                    {
                        "rbSubscriptionRevenue": 100,
                        "rbSubscriptionPeriod": {
                            "rbRatingPeriodStart": "2/5/2014",
                            "rbRatingPeriodEnd": "3/4/2014"
                        }
                    },
                    ...
                    {
                        "rbSubscriptionRevenue": 100,
                        "rbSubscriptionPeriod": {
                            "rbRatingPeriodStart": "11/5/2014",
                            "rbRatingPeriodEnd": "12/4/2014"
                        }
                    }
                ]
            }
        ]
```

```
        }
    ]
}
```

Back to Supported Methods | **Back to** rbEvaluateChangeOrder | **Back to** Change Order Objects

rbReactivate

Use this object with the rbEvaluateChangeOrder method to evaluate the revenue impact of reactivating a subscription item that is in a suspended state.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbBillingOption` [required] – Internal ID of the bill option

Internal ID	Bill Option
1	Bill for the Suspended Period
2	Bill from the Reactivation Date

- `rbExtendTerm` [optional] – If not provided, default value is false (F). If you want to extend the term upon reactivation, set the value to true (T). This parameter is applicable only to non-perpetual items and if the billing option selected is bill from reactivation date, that is, if rbBillingOption is 2. For more information, see Extending the Term Upon Reactivation.
- `rbChangeURN` [optional] – External ID of the change order

Example

Sample Request

```
{
  "rbMethod" : "rbEvaluateChangeOrder",
  "rbSubscription": 6,
  "rbChangeAt": "12/30/2013",
  "rbReactivate": [{
     "rbSubscriptionItem": 410,
     "rbBillingOption": 1,
     "rbExtendTerm": F,
     "rbChangeURN": null
  }]
}
```

Sample Response

```
 {
    "rbSubscription": 6,
    "rbSubscriptionCurrency": {
        "id": "1",
        "name": "USA"
    },
    "rbChangeAt": "12/30/2013",
    "rbChangeType": "rbReactivate",
    "rbRevenueChanges": [
```

```
        {
            "rbChangeRevenueTotal": 1495.83333334,
            "rbChangeRevenueItems": [
                {
                    "rbSubscriptionItem": "411",
                    "rbChangeRevenueTotal": 1196.66666667,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": 70,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/5/2013",
                                "rbRatingPeriodEnd": "12/25/2013"
                            }
                        },
                        ...
                        {
                            "rbSubscriptionRevenue": 26.66666667,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "11/26/2014",
                                "rbRatingPeriodEnd": "12/3/2014"
                            }
                        }
                    ]
                },
                {
                    "rbSubscriptionItem": "413",
                    "rbChangeRevenueTotal": 299.16666667,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": 17.5,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/5/2013",
                                "rbRatingPeriodEnd": "12/25/2013"
                            }
                        },
                        ...
                        {
                            "rbSubscriptionRevenue": 6.66666667,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "11/26/2014",
                                "rbRatingPeriodEnd": "12/3/2014"
                            }
                        }
                    ]
                }
            ]
        }
    ]
```

Back to Supported Methods | **Back to** rbEvaluateChangeOrder | **Back to** Change Order Objects

rbSetFixedUsage

Use this object with the rbEvaluateChangeOrder method to evaluate the revenue impact of modifying the quantity of a fixed usage subscription item within a subscription.

Parameters

- `rbSubscriptionItem` [required] – The internal ID of the secondary subscription item. Note that the specified secondary subscription item must be of fixed usage item type.
- `rbUsageQuantity` [required] – The new value for the quantity. Value can be any positive value or zero.
- `rbChangeURN` [optional] – The external ID of the change order

Example

Sample Request

```
{
  "rbMethod" : "rbEvaluateChangeOrder",
  "rbSubscription": 13,
  "rbChangeAt": "12/30/2013",
  "rbSetFixedUsage": [{
     "rbSubscriptionItem": 823,
     "rbUsageQuantity": 40,
     "rbChangeURN": null
  }]
}
```

Sample Response

```
{
    "rbSubscription": 13,
    "rbSubscriptionCurrency": {
        "id": "1",
        "name": "USA"
    },
    "rbChangeAt": "12/30/2013",
    "rbChangeType": "rbSetFixedUsage",
    "rbRevenueChanges": [
        {
            "rbChangeRevenueTotal": -279.83870967999997,
            "rbChangeRevenueItems": [
                {
                    "rbSubscriptionItem": 823,
                    "rbChangeRevenueTotal": -279.83870967999997,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": -4.83870968,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/30/2013",
                                "rbRatingPeriodEnd": "1/4/2014"
                            }
                        },
                        {
                            "rbSubscriptionRevenue": -25,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "1/5/2014",
                                "rbRatingPeriodEnd": "2/4/2014"
                            }
                        },
```

```
                    ...
                    {
                        "rbSubscriptionRevenue": -25,
                        "rbSubscriptionPeriod": {
                            "rbRatingPeriodStart": "11/5/2014",
                            "rbRatingPeriodEnd": "12/4/2014"
                        }
                    }
                ]
            }
        ]
    }
    ]
}
```

Back to Supported Methods | **Back to** rbEvaluateChangeOrder | **Back to** Change Order Objects

rbSetStartDate

Use this object with the rbEvaluateChangeOrder method to evaluate the revenue impact of modifying the start date of a subscription.

Note: Currently, this action only returns no change in revenue.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbChangeURN` [optional] – External ID of the change order

Example

Sample Request

```
{
  "rbMethod" : "rbEvaluateChangeOrder",
  "rbSubscription": 8,
  "rbChangeAt": "12/8/2013",
  "rbSetStartDate": [{
     "rbSubscriptionItem":512,
     "rbChangeURN": null
  }]
}
```

Sample Response

```
{
    "rbSubscription": 8,
    "rbSubscriptionCurrency": {
        "id": "1",
        "name": "USA"
    },
    "rbChangeAt": "12/8/2013",
    "rbChangeType": "rbSetStartDate",
    "rbRevenueChanges": [
        {
            "message": "No Change in Revenue for Modify Start Date"
```

```
        }
    ]
}
```

Back to Supported Methods | **Back to** rbEvaluateChangeOrder | **Back to** Change Order Objects

rbSuspend

Use this object with the rbEvaluateChangeOrder method to evaluate the revenue impact of suspending a subscription item.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbChangeURN` [optional] – External ID of the change order

Example

Sample Request

```
{
  "rbMethod" : "rbEvaluateChangeOrder",
  "rbSubscription": 13,
  "rbChangeAt": "12/30/2013",
  "rbSuspend": [{
     "rbSubscriptionItem": 819,
     "rbChangeURN": null
  }]
}
```

Sample Response

```
{
    "rbSubscription": 13,
    "rbSubscriptionCurrency": {
        "id": "1",
        "name": "USA"
    },
    "rbChangeAt": "12/30/2013",
    "rbChangeType": "rbSuspend",
    "rbRevenueChanges": [
        {
            "rbChangeRevenueTotal": -1518.5483871,
            "rbChangeRevenueItems": [
                {
                    "rbSubscriptionItem": "820",
                    "rbChangeRevenueTotal": -1119.35483871,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": -19.35483871,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/30/2013",
                                "rbRatingPeriodEnd": "1/4/2014"
                            }
                        },
                        ...
```

```
                        {
                            "rbSubscriptionRevenue": -100,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "11/5/2014",
                                "rbRatingPeriodEnd": "12/4/2014"
                            }
                        }
                    ]
                },
                {
                    "rbSubscriptionItem": "821",
                    "rbChangeRevenueTotal": -119.35483871,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": -19.35483871,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/30/2013",
                                "rbRatingPeriodEnd": "1/4/2014"
                            }
                        },
                        {
                            "rbSubscriptionRevenue": -100,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "1/5/2014",
                                "rbRatingPeriodEnd": "2/4/2014"
                            }
                        }
                    ]
                },
                {
                    "rbSubscriptionItem": "823",
                    "rbChangeRevenueTotal": -279.83870967999997,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": -4.83870968,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/30/2013",
                                "rbRatingPeriodEnd": "1/4/2014"
                            }
                        },
                        ...
                        {
                            "rbSubscriptionRevenue": -25,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "11/5/2014",
                                "rbRatingPeriodEnd": "12/4/2014"
                            }
                        }
                    ]
                }
            ]
        }
    ]
}
```

Back to Supported Methods | **Back to** rbEvaluateChangeOrder | **Back to** Change Order Objects

rbTerminate

Use this object with the rbEvaluateChangeOrder method to evaluate the revenue impact of terminating a subscription item.

Parameters

- `rbSubscriptionItem` [required] – Internal ID of the primary subscription item
- `rbChangeURN` [optional] – External ID of the change order
- `rbProrate` [optional] – If not provided, default value is false (F). To apply proration, change value to true (T).

Example

Sample Request

```
 {
  "rbMethod" : "rbEvaluateChangeOrder",
  "rbSubscription": 13,
  "rbChangeAt": "12/30/2013",
  "rbTerminate": [{
     "rbSubscriptionItem": 819,
     "rbChangeURN": null
  }]
}
```

Sample Response

```
 {
    "rbSubscription": 13,
    "rbSubscriptionCurrency": {
        "id": "1",
        "name": "USA"
    },
    "rbChangeAt": "12/30/2013",
    "rbChangeType": "rbTerminate",
    "rbRevenueChanges": [
        {
            "rbChangeRevenueTotal": -1518.5483871,
            "rbChangeRevenueItems": [
                {
                    "rbSubscriptionItem": "820",
                    "rbChangeRevenueTotal": -1119.35483871,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": -19.35483871,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/30/2013",
                                "rbRatingPeriodEnd": "1/4/2014"
                            }
                        },
                        ...
                        {
```

```
                            "rbSubscriptionRevenue": -100,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "11/5/2014",
                                "rbRatingPeriodEnd": "12/4/2014"
                            }
                        }
                    ]
                },
                {
                    "rbSubscriptionItem": "821",
                    "rbChangeRevenueTotal": -119.35483871,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": -19.35483871,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/30/2013",
                                "rbRatingPeriodEnd": "1/4/2014"
                            }
                        },
                        {
                            "rbSubscriptionRevenue": -100,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "1/5/2014",
                                "rbRatingPeriodEnd": "2/4/2014"
                            }
                        }
                    ]
                },
                {
                    "rbSubscriptionItem": "823",
                    "rbChangeRevenueTotal": -279.83870967999997,
                    "rbChangeRevenueDetails": [
                        {
                            "rbSubscriptionRevenue": -4.83870968,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "12/30/2013",
                                "rbRatingPeriodEnd": "1/4/2014"
                            }
                        },
                        ...
                        {
                            "rbSubscriptionRevenue": -25,
                            "rbSubscriptionPeriod": {
                                "rbRatingPeriodStart": "11/5/2014",
                                "rbRatingPeriodEnd": "12/4/2014"
                            }
                        }
                    ]
                }
            ]
        }
    ]
}
```

Back to Supported Methods | **Back to** rbEvaluateChangeOrder | **Back to** Change Order Objects

rbGetCustomerSubscriptionDetails

Use this method to retrieve a primary subscription item and its secondary subscription items.

Parameters

- `rbSubscriptionId` [required] – Internal ID of the primary item in a subscription

Returns

- `rbCustomer` – ID and name of the customer
- `rbSubscription` – Details of the primary subscription item
  - `rbSubscriptionId`
  - `rbSubscriptionURN`

    Note: URN values pertain to external ID.

  - `rbSubscriptionLeadItem`
  - `rbSubscriptionPlan`
  - `rbSubscriptionStartAt`
  - `rbSubscriptionEndAt`
  - `rbSubscriptionTerm`
  - `rbSubscriptionStatus`
  - `rbSubscriptionTerminationMethod`
  - `rbSubscriptionOrderId`
  - `rbSubscriptionItems` – Details of the secondary subscription items
    - `rbSubscriptionItemId`
    - `rbSubscriptionItemItem`
    - `rbSubscriptionItemRatePlan`
    - `rbSubscriptionItemQuantity`
    - `rbSubscriptionItemDiscount`
    - `rbSubscriptionItemChargeType`
    - `rbSubscriptionItemBillingAlignment`
    - `rbSubscriptionItemBillFrequency`
    - `rbSubscriptionItemStartAt`
    - `rbSubscriptionItemEndAt`
    - `rbSubscriptionItemRenewedAt`
    - `rbSubscriptionItemTerminateAt`
    - `rbSubscriptionItemStatus`

Note: Returned date and time values are shown relative to the time zone set on the Subscription Billing Preferences page.

Example

Sample Request:

```
{
"rbMethod": "rbGetCustomerSubscriptionDetails",
"rbSubscriptionId":305
}
```

Sample Response:

```
{
    "rbCustomer": {
        "id": "111",
        "name": "3 Mr Santi"
    },
    "rbSubscription": {
        "rbSubscriptionId": "305",
        "rbSubscriptionURN": null,
        "rbSubscriptionLeadItem": {
            "id": "6",
            "name": "Renew_Lead_Anv"
        },
        "rbSubscriptionPlan": {
            "id": "1",
            "name": "anv_mntly_12mon_auto"
        },
        "rbSubscriptionStartAt": "10/11/2013 6:00:00 am",
        "rbSubscriptionEndAt": "10/10/2014 6:00:00 am",
        "rbSubscriptionTerm": {
            "id": "4",
            "name": "12 months"
        },
        "rbSubscriptionStatus": {
            "id": "2",
            "name": "Open"
        },
        "rbSubscriptionTerminationMethod": {
            "id": "2",
            "name": "Upon cancellation"
        },
        "rbSubscriptionOrderId": "105",
        "rbSubscriptionItems": [
            {
                "rbSubscriptionItemId": "504",
                "rbSubscriptionItemItem": {
                    "id": "8",
                    "name": "Recurring_1"
                },
                "rbSubscriptionItemRatePlan": {
                    "id": "1",
                    "name": "flat_100"
                },
                "rbSubscriptionItemQuantity": "1",
                "rbSubscriptionItemDiscount": "",
                "rbSubscriptionItemChargeType": {
                    "id": "2",
                    "name": "Recurring Service"
                },
```

```
            "rbSubscriptionItemBillingAllignment": "",
            "rbSubscriptionItemBillFrequency": {
                "id": "4",
                "name": "Monthly"
            },
            "rbSubscriptionItemStartAt": "10/11/2013 6:00:00 am",
            "rbSubscriptionItemEndAt": "10/10/2014 6:00:00 am",
            "rbSubscriptionItemRenewedAt": "",
            "rbSubscriptionItemTerminateAt": "",
            "rbSubscriptionItemStatus": ""
        },
        {
            "rbSubscriptionItemId": "505",
            "rbSubscriptionItemItem": {
                "id": "12",
                "name": "TermFee_1"
            },
            "rbSubscriptionItemRatePlan": {
                "id": "1",
                "name": "flat_100"
            },
            "rbSubscriptionItemQuantity": "1",
            "rbSubscriptionItemDiscount": "",
            "rbSubscriptionItemChargeType": {
                "id": "4",
                "name": "Termination Fee"
            },
            "rbSubscriptionItemBillingAllignment": "",
            "rbSubscriptionItemBillFrequency": {
                "id": "4",
                "name": "Monthly"
            },
            "rbSubscriptionItemStartAt": "10/11/2013 6:00:00 am",
            "rbSubscriptionItemEndAt": "10/10/2014 6:00:00 am",
            "rbSubscriptionItemRenewedAt": "",
            "rbSubscriptionItemTerminateAt": "",
            "rbSubscriptionItemStatus": ""
        },
        {
            "rbSubscriptionItemId": "506",
            "rbSubscriptionItemItem": {
                "id": "11",
                "name": "Fixed_1"
            },
            "rbSubscriptionItemRatePlan": {
                "id": "3",
                "name": "vol_05"
            },
            "rbSubscriptionItemQuantity": "150",
            "rbSubscriptionItemDiscount": "",
            "rbSubscriptionItemChargeType": {
                "id": "5",
                "name": "Fixed Usage"
            },
            "rbSubscriptionItemBillingAllignment": "",
```

```
                "rbSubscriptionItemBillFrequency": {
                    "id": "4",
                    "name": "Monthly"
                },
                "rbSubscriptionItemStartAt": "10/11/2013 6:00:00 am",
                "rbSubscriptionItemEndAt": "10/10/2014 6:00:00 am",
                "rbSubscriptionItemRenewedAt": "",
                "rbSubscriptionItemTerminateAt": "",
                "rbSubscriptionItemStatus": ""
            },
            {
                "rbSubscriptionItemId": "507",
                "rbSubscriptionItemItem": {
                    "id": "13",
                    "name": "Variable_1"
                },
                "rbSubscriptionItemRatePlan": {
                    "id": "3",
                    "name": "vol_05"
                },
                "rbSubscriptionItemQuantity": "1",
                "rbSubscriptionItemDiscount": "",
                "rbSubscriptionItemChargeType": {
                    "id": "3",
                    "name": "Variable Usage"
                },
                "rbSubscriptionItemBillingAllignment": "",
                "rbSubscriptionItemBillFrequency": {
                    "id": "4",
                    "name": "Monthly"
                },
                "rbSubscriptionItemStartAt": "10/11/2013 6:00:00 am",
                "rbSubscriptionItemEndAt": "10/10/2014 6:00:00 am",
                "rbSubscriptionItemRenewedAt": "",
                "rbSubscriptionItemTerminateAt": "",
                "rbSubscriptionItemStatus": ""
            }
        ]
    }
}
```


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rbGetCustomerSubscriptions

Use this method to retrieve subscription details, including primary subscription items, for a specified customer.

Parameters

- `rbCustomer` [required] – Internal ID of the customer
- `rbSubscription` [optional] – Internal ID of the subscription
- `rbSubscriptionStatus` [optional] – A single ID for status or an array of subscription status

Returns

- `rbCustomer` – ID and name of the customer
- `rbSubscriptionAgreements` – Details of the subscription
  - `rbSubscriptionAgreementId`
  - `rbSubscriptionAgreementURN`
  - `rbSubscriptionAgreementStartAt`
  - `rbSubscriptionAgreementNextBillAt`
  - `rbSubscriptionAgreementTerm`
  - `rbSubscriptionAgreementStatus`
  - `rbSubscriptionAgreementCurrency`
  - `rbSubscriptionAgreementNextBillingAmount`
  - `rbSubscriptions` – Details of the primary subscription item
    - `rbSubscriptionId`
    - `rbSubscriptionURN`

      > **Note:** URN values pertain to external ID.

    - `rbSubscriptionLeadItem`
    - `rbSubscriptionPlan`
    - `rbSubscriptionStartAt`
    - `rbSubscriptionEndAt`
    - `rbSubscriptionTerm`
    - `rbSubscriptionStatus`
    - `rbSubscriptionTerminationMethod`
    - `rbSubscriptionOrderId`

> **Important:** Currently, rbSubscriptionAgreement values in the response object pertain to subscription details and rbSubscription values pertain to primary subscription item details.

> **Note:** Only active subscriptions are returned.
>
> Also, returned date and time values are shown relative to the time zone set on the Subscription Billing Preferences page.

Example

Sample Request:

```
{
"rbMethod": "rbGetCustomerSubscriptions",
"rbCustomer":1611,
"rbSubscription" : 2330,
"rbSubscriptionStatus" : [5,2]
}
```

Sample Response:

```
{
    "rbCustomer": {
        "id": "1611",
        "name": "Renewal_Customer"
    },
    "rbSubscriptionAgreements": [
        {
            "rbSubscriptionAgreementId": "2330",
            "rbSubscriptionAgreementURN": "",
            "rbSubscriptionAgreementStartAt": "11/12/2013 6:00:00 am",
            "rbSubscriptionAgreementNextBillAt": "12/12/2013 6:00:00 am",
            "rbSubscriptionAgreementTerm": {
                "id": "",
                "name": ""
            },
            "rbSubscriptionAgreementStatus": {
                "id": "2",
                "name": "Open"
            },
            "rbSubscriptionAgreementCurrency": {
                "id": "1",
                "name": "USA"
            },
            "rbSubscriptionAgreementNextBillingAmount": "1454.67",
            "rbSubscriptions": [
                {
                    "rbSubscriptionId": "10355",
                    "rbSubscriptionURN": null,
                    "rbSubscriptionLeadItem": {
                        "id": "105",
                        "name": "Renew_Lead_Anv"
                    },
                    "rbSubscriptionPlan": {
                        "id": "104",
                        "name": "anv_mntly_12mon_auto"
                    },
                    "rbSubscriptionStartAt": "11/12/2013 6:00:00 am",
                    "rbSubscriptionEndAt": "11/11/2014 6:00:00 am",
                    "rbSubscriptionTerm": {
                        "id": "4",
                        "name": "12 months"
                    },
                    "rbSubscriptionStatus": {
                        "id": "2",
                        "name": "Open"
                    },
                    "rbSubscriptionTerminationMethod": {
                        "id": "2",
                        "name": "Upon cancellation"
                    },
                    "rbSubscriptionOrderId": "5431"
                },
                {
                    "rbSubscriptionId": "10356",
                    "rbSubscriptionURN": null,
```

```
            "rbSubscriptionLeadItem": {
                "id": "105",
                "name": "Renew_Lead_Anv"
            },
            "rbSubscriptionPlan": {
                "id": "110",
                "name": "anv_mntly_12mon_auto_duration"
            },
            "rbSubscriptionStartAt": "11/12/2013 6:00:00 am",
            "rbSubscriptionEndAt": "11/11/2014 6:00:00 am",
            "rbSubscriptionTerm": {
                "id": "4",
                "name": "12 months"
            },
            "rbSubscriptionStatus": {
                "id": "2",
                "name": "Open"
            },
            "rbSubscriptionTerminationMethod": {
                "id": "2",
                "name": "Upon cancellation"
            },
            "rbSubscriptionOrderId": "5431"
        },
        {
            "rbSubscriptionId": "10357",
            "rbSubscriptionURN": null,
            "rbSubscriptionLeadItem": {
                "id": "105",
                "name": "Renew_Lead_Anv"
            },
            "rbSubscriptionPlan": {
                "id": "134",
                "name": "anv_mntly_12mon_auto_extend"
            },
            "rbSubscriptionStartAt": "11/12/2013 6:00:00 am",
            "rbSubscriptionEndAt": "11/11/2014 6:00:00 am",
            "rbSubscriptionTerm": {
                "id": "4",
                "name": "12 months"
            },
            "rbSubscriptionStatus": {
                "id": "2",
                "name": "Open"
            },
            "rbSubscriptionTerminationMethod": {
                "id": "2",
                "name": "Upon cancellation"
            },
            "rbSubscriptionOrderId": "5431"
        },
        {
            "rbSubscriptionId": "10358",
            "rbSubscriptionURN": null,
            "rbSubscriptionLeadItem": {
```

```
                    "id": "105",
                    "name": "Renew_Lead_Anv"
                },
                "rbSubscriptionPlan": {
                    "id": "138",
                    "name": "anv_mntly_12mon_await_newterm"
                },
                "rbSubscriptionStartAt": "11/12/2013 6:00:00 am",
                "rbSubscriptionEndAt": "11/11/2014 6:00:00 am",
                "rbSubscriptionTerm": {
                    "id": "4",
                    "name": "12 months"
                },
                "rbSubscriptionStatus": {
                    "id": "2",
                    "name": "Open"
                },
                "rbSubscriptionTerminationMethod": {
                    "id": "2",
                    "name": "Upon cancellation"
                },
                "rbSubscriptionOrderId": "5431"
            },
            {
                "rbSubscriptionId": "10359",
                "rbSubscriptionURN": null,
                "rbSubscriptionLeadItem": {
                    "id": "105",
                    "name": "Renew_Lead_Anv"
                },
                "rbSubscriptionPlan": {
                    "id": "138",
                    "name": "anv_mntly_12mon_await_newterm"
                },
                "rbSubscriptionStartAt": "11/12/2013 6:00:00 am",
                "rbSubscriptionEndAt": "11/11/2014 6:00:00 am",
                "rbSubscriptionTerm": {
                    "id": "4",
                    "name": "12 months"
                },
                "rbSubscriptionStatus": {
                    "id": "2",
                    "name": "Open"
                },
                "rbSubscriptionTerminationMethod": {
                    "id": "2",
                    "name": "Upon cancellation"
                },
                "rbSubscriptionOrderId": "5431"
            }
        ]
    }
  ]
}
```

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rbGetCustomerTransactions

Use this method to retrieve subscription transactions and payment methods.

Parameters

- `rbSubscriptionAgreementId` [required] – Internal ID of the subscription

Returns

- `rbCustomer` – ID and name of the customer
- `rbSubscriptionAgreement` – Details of the subscription, including it's transactions and payments
  - `rbSubscriptionAgreement`
    - `rbSubscriptionAgreementID`
    - `rbSubscriptionAgreementURN`
    - `rbSubscriptionAgreementStartAt`
    - `rbSubscriptionAgreementNextBillAt`
    - `rbSubscriptionAgreementTerm`
    - `rbSubscriptionAgreementStatus`
    - `rbSubscriptionAgreementCurrency`
    - `rbSubscriptionAgreementNextBillingAmount`
    - `rbSubscriptionAgreementTransaction` – Details of the cash sale and invoice records that were billed on the subscription
      - `rbSubscriptionTransactionNumber`
      - `rbSubscriptionTransactionDate`
      - `rbSubscriptionTransactionType`
      - `rbSubscriptionTransactionAmoundPaid`
      - `rbSubscriptionTransactionAmountRemaining`
      - `rbSubscriptionTransactionCurrency`
      - `rbSubscriptionTransactionStatus`
      - `rbSubscriptionTransactionPayments` – Details of a payment made against the associated invoice or cash sale
        - `rbSubscriptionTransactionPaymentNumber`
        - `rbSubscriptionTransactionPaymentDate`
        - `rbSubscriptionTransactionPaymentMethod`
        - `rbSubscriptionTransactionPaymentCurrency`

Note: Currency can only be retrieved if the Multiple Currencies feature is enabled. If this feature is disabled, rbSubscriptionAgreementCurrency, rbSubscriptionTransactionCurrency, and rbSubscriptionTransactionPaymentCurrency are returned as null.

Also, note that if the amount paid or amount remaining is zero, the corresponding response object rbSubscriptionTransactionAmoundPaid or rbSubscriptionTransactionAmountRemaining is returned as **.00** for both invoice and cash sale.

Example

Sample Request:

```
{
      "rbMethod":"rbGetCustomerTransactions",
      "rbSubscriptionAgreementId": "3"
}
```

Sample Response:

```
{
      "rbCustomer": {
            "id": "3",
            "name": "1 Customer 1",
            "rbCustomerCustomFields": {}
      },
      "rbSubscriptionAgreement": {
            "rbSubscriptionAgreementId": "1",
            "rbSubscriptionAgreementURN": "",
            "rbSubscriptionAgreementStartAt": "4/20/2014 12:00:00 am",
            "rbSubscriptionAgreementNextBillAt": "5/1/2014 12:00:00 am",
            "rbSubscriptionAgreementTerm": {
                  "id": "",
                  "name": ""
            },
            "rbSubscriptionAgreementStatus": {
                  "id": "2",
                  "name": "Open"
            },
            "rbSubscriptionAgreementCurrency": {
                  "id": "1",
                  "name": "US Dollar"
            },
            "rbSubscriptionAgreementNextBillingAmount": "50.00",
            "rbSubscriptionTransaction": [
                  {
                        "rbSubscriptionTransactionNumber": "1",
                        "rbSubscriptionTransactionDate": "4/19/2014",
                        "rbSubscriptionTransactionType": {
                              "id": "CustInvc",
                              "name": "Invoice"
                        },
                        "rbSubscriptionTransactionAmountPaid": "50.00",
                        "rbSubscriptionTransactionAmountRemaining": ".00",
                        "rbSubscriptionTransactionCurrency": {
                              "id": "1",
```

```
                    "name": "US Dollar"
                },
                "rbSubscriptionTransactionStatus": {
                    "id": "paidInFull",
                    "name": "Paid In Full"
                },
                "rbSubscriptionTransactionPayments": [
                  {
                        "rbSubscriptionTransactionPaymentNumber": "103",
                        "rbSubscriptionTransactionPaymentDate": "4/20/2014",
                        "rbSubscriptionTransactionPaymentMethod": {
                            "id": "",
                            "name": ""
                        },
                        "rbSubscriptionTransactionPaymentCurrency": {
                            "id": "1",
                            "name": "US Dollar"
                        }
                  }
              ],
              "rbTransactionCustomFields": {}
              }
            ],
        "rbSubscriptionAgreementCustomFields": {}
      }
  }
```


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rbGetLeadItems

Use this method to retrieve a list of active lead items that are available for sale with a subscription.

Parameters

- `Subsidiary` [required for NetSuite OneWorld accounts only] – Internal ID of a subsidiary

Returns

- `rbItem` – An array of available items with ID and name information

Example

Sample Request:

```
{
"rbMethod":"rbGetLeadItems",
"Subsidiary":1
}
```

Sample Response:

```
{
    "rbItem": [
        {
            "id": "6",
```

```
            "name": "Renew_Lead_Anv"
        },
        {
            "id": "7",
            "name": "Renew_Lead_DOM"
        }
    ]
}
```


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rbGetRatePlanDetails

Use this method to retrieve the details of a specified rate plan.

Parameters

- `rbRatePlan` [required] – Internal ID of the rate plan
- `rbRatePlanStatus` [optional] – A single ID for status or an array of rate plan status

Returns

- `rbRatePlan`
- `rbRatePlanModel`
- `rbRatePlanStatus`
- `rbRatePlanCurrency`
- `rbRatePlanIncludedUsage`
- `rbRatePlanMinimumCharge`
- `rbRatePlanMaximumCharge`
- `rbRatePlanUsageTiers` – Details of each usage tier defined for the specified rate plan. Tier objects are returned in ascending order, each with the following details:
  - `rbRatePlanUsageTierType`

    > **Note:** Tier type field is currently not yet available in the usage tier record. This object returns null.

  - `rbRatePlanUsageTier`
  - `rbRatePlanUsageTierBase`
  - `rbRatePlanUsageTierAmount`

Example

Sample Request:


```
{
"rbMethod":"rbGetRatePlanDetails",
"rbRatePlanStatus": [5,1],
"rbRatePlan":4
}
```


Sample Response:


```
{
```

```
    "rbRatePlan": {
        "id": "4",
        "name": "tier_05_300min_1000max"
    },
    "rbRatePlanModel": {
        "id": "3",
        "name": "Tiered Pricing (Rates)"
    },
    "rbRatePlanStatus": {
        "id": "5",
        "name": "Available"
    },
    "rbRatePlanCurrency": {
        "id": "1",
        "name": "USA"
    },
    "rbRatePlanIncludedUsage": "100",
    "rbRatePlanMinimumCharge": "",
    "rbRatePlanMaximumCharge": "",
    "rbRatePlanUsageTiers": [
        {
            "rbRatePlanUsageTierType": {
                "id": null,
                "name": null
            },
            "rbRatePlanUsageTier": {
                "id": "4",
                "name": "0"
            },
            "rbRatePlanUsageTierBase": "0",
            "rbRatePlanUsageTierAmount": ".5"
        }
    ]
}
```


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rbGetSubscriptionPlans

Use this method to retrieve a list of subscription plans for a specified lead item.

Parameters

- `rbItem` [required] – Internal ID of the lead item
- `rbSubsidiary` [required for NetSuite OneWorld accounts only] – Internal ID of the subsidiary
- `rbSubscriptionPlan` [optional] – Internal ID of the subscription plan
- `rbSubscriptionPlanStatus` [optional] – A single ID for status or an array of subscription plan status

Returns

- `rbItem` – ID and name of the lead item
- `rbSubscriptionPlans` – An array of rbSubscriptionPlan objects
    - `rbSubscriptionPlan`

- `rbSubscriptionPlanTerm`
- `rbSubscriptionPlanStatus`
- `rbSubscriptionPlanBillFrequency`
- `rbSubscriptionPlanCurrency`
- `rbSubscriptionPlanRenewalAction`
- `rbSubscriptionPlanTRA`
- `rbSubscriptionPlanItems` – Details of each subscription plan item within a subscription plan
  - `rbSubscriptionPlanItem`
  - `rbSubscriptionPlanItemItem`
  - `rbSubscriptionChargeType`
  - `rbSubscriptionPlanItemRatePlan`
  - `rbSubscriptionPlanItemQuantity`
  - `rbSubscriptionPlanItemUnit`
  - `rbSubscriptionPlanItemBillMethod`
  - `rbSubscriptionPlanItemAllowDiscount`

Example

Sample Request:


```
{
"rbMethod":"rbGetSubscriptionPlans",
"rbItem":105,
"rbSubsidiary":1,
"rbSubscriptionPlan":104,
"rbSubscriptionPlanStatus" : [5,1]
}
```


Sample Response:


```
{
    "rbItem": {
        "id": "105",
        "name": "Renew_Lead_Anv"
    },
    "rbSubscriptionPlans": [
        {
            "rbSubscriptionPlan": {
                "id": "104",
                "name": "anv_mntly_12mon_auto"
            },
            "rbSubscriptionPlanTerm": {
                "id": "4",
                "name": "12 months"
            },
           "rbSubscriptionPlanStatus": {
                "id": "6",
                "name": "Unavailable"
            },
            "rbSubscriptionPlanBillFrequency": {
```

```
                "id": "4",
                "name": "Monthly"
            },
            "rbSubscriptionPlanCurrency": {
                "id": "1",
                "name": "USA"
            },
            "rbSubscriptionPlanRenewalAction": {
                "id": "1",
                "name": "Automatically Renew"
            },
            "rbSubscriptionPlanTRA": "100",
            "rbSubscriptionPlanItems": [
                {
                    "rbSubscriptionPlanItem": {
                        "id": "204",
                        "name": "Fixed_1"
                    },
                    "rbSubscriptionPlanItemItem": {
                        "id": "110",
                        "name": "Fixed_1"
                    },
                    "rbSubscriptionPlanItemChargeType": {
                        "id": "5",
                        "name": "Fixed Usage"
                    },
                    "rbSubscriptionPlanItemRatePlan": {
                        "id": "103",
                        "name": "vol_05"
                    },
                    "rbSubscriptionPlanItemUnit": {
                        "id": "5",
                        "name": "Billing Period"
                    },
                    "rbSubscriptionPlanItemBillMethod": {
                        "id": "1",
                        "name": "Advance"
                    },
                    "rbSubscriptionPlanItemAllowDiscount": "F",
                    "rbSubscriptionPlanItemQuantity": "150"
                },
                {
                    "rbSubscriptionPlanItem": {
                        "id": "202",
                        "name": "Recurring_1"
                    },
                    "rbSubscriptionPlanItemItem": {
                        "id": "107",
                        "name": "Recurring_1"
                    },
                    "rbSubscriptionPlanItemChargeType": {
                        "id": "2",
                        "name": "Recurring Service"
                    },
                    "rbSubscriptionPlanItemRatePlan": {
```

```
                "id": "101",
                "name": "flat_100"
            },
            "rbSubscriptionPlanItemUnit": {
                "id": "5",
                "name": "Billing Period"
            },
            "rbSubscriptionPlanItemBillMethod": {
                "id": "1",
                "name": "Advance"
            },
            "rbSubscriptionPlanItemAllowDiscount": "F",
            "rbSubscriptionPlanItemQuantity": ""
        },
        {
            "rbSubscriptionPlanItem": {
                "id": "203",
                "name": "TermFee_1"
            },
            "rbSubscriptionPlanItemItem": {
                "id": "111",
                "name": "TermFee_1"
            },
            "rbSubscriptionPlanItemChargeType": {
                "id": "4",
                "name": "Termination Fee"
            },
            "rbSubscriptionPlanItemRatePlan": {
                "id": "101",
                "name": "flat_100"
            },
            "rbSubscriptionPlanItemUnit": {
                "id": "5",
                "name": "Billing Period"
            },
            "rbSubscriptionPlanItemBillMethod": {
                "id": "2",
                "name": "Arrears"
            },
            "rbSubscriptionPlanItemAllowDiscount": "F",
            "rbSubscriptionPlanItemQuantity": ""
        },
        {
            "rbSubscriptionPlanItem": {
                "id": "205",
                "name": "Variable_1"
            },
            "rbSubscriptionPlanItemItem": {
                "id": "112",
                "name": "Variable_1"
            },
            "rbSubscriptionPlanItemChargeType": {
                "id": "3",
                "name": "Variable Usage"
            },
```

```
                "rbSubscriptionPlanItemRatePlan": {
                    "id": "103",
                    "name": "vol_05"
                },
                "rbSubscriptionPlanItemUnit": {
                    "id": "5",
                    "name": "Billing Period"
                },
                "rbSubscriptionPlanItemBillMethod": {
                    "id": "2",
                    "name": "Arrears"
                },
                "rbSubscriptionPlanItemAllowDiscount": "F",
                "rbSubscriptionPlanItemQuantity": ""
            }
        ]
    }
]
}
```

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Error Codes

The following table lists error code types that can be returned in a message response when using Recurring Billing Integration.

Code	Error Code Returned	Long Description or Message
10	PLUGIN_MISSING_REQUIRED_PARAMETER	Missing {0}{1} parameter - should not be null/blank/undefined
11	PLUGIN_INVALID_METHOD	Method not supported
12	PLUGIN_INVALID_ARRAY_LENGTH_ZERO	Please enter values for {0} - length should not be equal to zero
13	PLUGIN_INVALID_ARRAY_VALUE_TYPE	{0} should contain values in {1} format
14	PLUGIN_FORMAT_PARAMETER_REQUIRED	Please enter {0} Parameter in {1} Format
15	PLUGIN_INVALID_NUMBER_FORMAT	Invalid Number {0} for field {1} {2}
16	PLUGIN_INVALID_DISCOUNT_PERCENTAGE	{0} - Invalid discount percentage. Input must be any positive value up to 100, excluding 0
17	PLUGIN_INVALID_UPLIFT_PERCENTAGE	{0} - Invalid uplift percentage. Input must be any positive value or any negative value down to -100, excluding 0
18	PLUGIN_INVALID_ADDITIONAL_PARAMETERS	{0} is not a valid parameter for {1}
19	PLUGIN_INVALID_PROPERTY_FIELD	invalid/missing field for {1} {0} - {2}
20	PLUGIN_INVALID_ORDER_DETAIL_ADDITIONAL	{0} field should be {1} for all objects inside rbOrderDetails
21	PLUGIN_INVALID_FIELD_SETTING	Invalid Field Value - {0}
23	PLUGIN_INVALID_CO_TERM_ITEM	Co-Termination Item is invalid
24	PLUGIN_INVALID_CO_TERM_SUBSCRIPTION_OPTION	Co-Termination is not available for new Subscriptions

Code	Error Code Returned	Long Description or Message
25	PLUGIN_CO_TERM_OPTION_MANDATORY	Missing rbSubscriptionCoterminationItem parameter if Co Term option is 2 (Align new items co-term with existing subscription) or 3(Align existing items co-term with newly added item)
26	PLUGIN_CO_TERM_INVALID_ITEM	Unable to set rbSubscriptionCoterminationItem parameter if Co Term option is not 2 (Align new items co-term with existing subscription) or 3 (Align existing items co-term with newly added item)
27	INVALID_CSTM_FORM	Invalid Sales Order form selected. Please set the correct default Plugin SO Form in SB Billing Preferences
28	UNIQUE_CUST_ID_REQD	A customer record with this ID already exists. You must enter a unique customer ID for each record you create
29	PLUGIN_INVALID_CREDIT_CARD_EXPIRATION	Please enter the correct credit card expiration format MM/YYYY
30	PLUGIN_INVALID_QUANTITY	Please enter valid quantity value - should be whole number not less than 0
31	PLUGIN_INVALID_ARRAY_VALUES	{0} Array should contain values in : {1} format
32	PLUGIN_INVALID_ARRAY_LENGTH_EXCEED	{0} Array should only contain {1} number of values
33	PLUGIN_MANDATORY_RELATED_VALUE_CHECK	{0} should be null/blank/undefined if {1} is {2}
34	PLUGIN_SHOULD_BE_NULL_VALUE_CHECK	Parameter {0} should be null/blank/undefined
35	PLUGIN_MANDATORY_RELATED_VALUE_TICKED_CHECK	{0} should be set to T if {1} contains value
36	PLUGIN_RATE_PLAN_INVALID_TIER	Multiple tiers is not allowed in flat rate pricing model
37	PLUGIN_INVALID_MIN_MAX_VALUE	Invalid Value - {0} should have a minimum value of {1}
40	PLUGIN_CHANGE_ORDER_CANCELLATION_STATUS	Cancellation not available if status is not Pending
41	PLUGIN_CHANGE_ORDER_MISSING_ID	Missing rbChange Id for cancellation
42	PLUGIN_INVALID_RELATED_FIELD	Invalid {0} set for {1} #{2}
43	PLUGIN_CHANGE_ORDER_CANCELLATION_INVALID_ID	{0} not existing for {1}
44	PLUGIN_CHANGE_ORDER_APPLIES_SECONDARY_ITEM	{0} only applies to Secondary Subscription Item
45	PLUGIN_CHANGE_ORDER_APPLIES_PRIMARY_ITEM	{0} only applies to Primary Subscription Item
46	PLUGIN_CHANGE_ORDER_EVALUATE_NOT_SUPPORTED	Evaluate Change Order is not supported for {0}
47	PLUGIN_CHANGE_ORDER_ADDITONAL_METHOD	Only 1 Change Order type can be executed per request. Additional property not handled
48	PLUGIN_START_DATE_LATER_THAN_END_DATE	Start date should be earlier than end date
50	PLUGIN_INVALID_CUSTOM_FIELD	Invalid/Missing Custom Field - {0}
51	PLUGIN_INVALID_CUSTOM_FIELD_SETTING	{0}
52	PLUGIN_INVALID_RB_CUSTOM_FIELD	You are not allowed to set a value for a Recurring Billing field in the {0} parameter - {1}
53	PLUGIN_INVALID_FORM_FOR_METHOD	Sales order form selected in the SO Form for Plugin preference is not valid for {0}.
99	PLUGIN_UNEXPECTED_ERROR	An unexpected error occurred

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Recurring Billing Best Practices

Charge Records

To prevent billing errors, do not manually edit the value in the **Charge Stage** field of charge records generated by the Recurring Billing SuiteApp.

For example, manually editing the charge record to change charge stage from Ready to Hold (because you want to skip a specific billing period) will result to a missing subscription charge error when the billing engine runs.

For specific use cases that require editing of charge record fields, please contact Customer Support for assistance.

Custom Records

To prevent errors and corruption of data, do not modify the values for the following fields on Recurring Billing custom records.

Record Type	Field Name	Field ID
Subscription	Customer	custrecord_sb_customer
	Billing Mode	custrecord_sb_sub_billing_mode
	Subsidiary	custrecord_sb_subscription_subsidiary
	Termination Method	custrecord_sb_sub_cancellation_type
	Billing Date Type	custrecord_sb_billing_date_type
Subscription Item	Subscription	custrecord_sb_sbitem_subscription
	Item	custrecord_sb_sbitem_item
	Subscription Plan	custrecord_sb_sbitem_subscriptionplan
	Subscription Plan Item	custrecord_sb_sbitem_subsplanitem
	Charge Type	custrecord_sb_sbitem_charge_type
	Billing Frequency	custrecord_sb_sbitem_billing_frequency
	Termination Method	custrecord_sb_sbitem_cancellation_type
Batch Process Type	Name	name

Scheduled Scripts

When a scheduled script is currently running, please exercise caution when making any changes to subscription and subscription item records. You can still perform billing, change orders, or other actions while the script runs in the background, but be aware that making any changes to the records may interfere with the running script and may cause data corruption.

A notification banner appears at the top of subscription and subscription item records to inform you when one of the following scheduled script is currently running in the background:

- SWV_SB_SS_REScheduler
- SWV_SB_SS_BEScheduler
- SWV_SB_SS_CreateUsageBasedCharge
- SWV_SB_SS_DeleteProcessQueueBatch
- SWV_SB_SS_BillTran
- SWV_SB_SS_CCScheduler
- SWV_SB_SS_CreateCharges
- SWV_SB_SS_SecondarySubItemGenerator