



8Quanta Subscription Billing Automation for NetSuite



INTRODUCTION AND OVERVIEW

Subscription Billing Automation from 8Quanta is for automation of subscription creation from a sales order transaction.

Extends NetSuite functionality to include fulfillable or non-inventory items in Subscriptions.

Utilizing an other charge item and leveraging native Netsuite Billing Accounts and Customer record data, default Subscriptions are created as replacement items to the other charge item.

Original Sales order data remains intact:

- Pricing
- Tax amount
- Discount
- Deposit
- Shipping

New Sales order is created that contains the transformed order from other charge item to subscription(s) and additional stand-alone items.

New Sales orders are created in a pending fulfillment status. Subscriptions are created in pending activation status.

If required by company, add-on, or stand-alone, items can be added per subscription based upon the original service item set up.

Item type can include:

- Assembly
- Kit
- Inventory Item
- Non-Inventory Item
- Service



SETUP

Item Setup:

- Service items
 - Affiliated add-on items
 - Default add-on items
- Subscription Plans
 - Assign service items
- Price Plans
- Price Books
- Other Charge Items
 - Default Subscription plan
 - Default Price book
 - Default Billing schedule
 - Default Custom Subscription (if applicable)
- Assembly Items (if applicable).
 - BOM
 - BOM Revision
 - Default BOM Assignment
 - Custom Assembly
 - Master BOM Assignment
- Billing schedules

Feature Options:

- Kit Add-on : If kits are used within a subscription order, script expands kits to components in order to distribute revenue.
- Status Change Add-on : Only used if company wants to bring in other orders aside from subscription orders in a pending approval status. Converts from Pending approval to pending fulfillment.
- Customer Deposit Add-on : Moves customer deposit from original Sales order over to New transformed Sales order.
- Work Order Creation Plug-in : Automatically create work orders for backordered fulfillable items added with subscription creation scripting.
- Automatic Item Fulfillment Plug-in : Fulfills Sales orders based on set criteria.
- Automatic Invoicing Add-on :
Automatically invoice sales orders created from subscription creation script with option for invoice per fulfillment or invoice per entire sales order.
- Automatic Subscription Activation Add-on : Option if company wants to automatically activate subscriptions created from the subscription creation script.
- Dependencies between scripts and add-ons or plug-ins needs to be defined.
- Schedule individual map/reduce and scheduled scripts with applicable date/time, priority and concurrency.

Native Netsuite Suitebilling and Advanced Revenue Recognition are required to be installed and set up according to Netsuite standards in order for this SuiteApp to be deployed and functional.

TRANSACCIONS

Subscription Creation Script:

- Originating Sales order is brought into Netsuite environment with other charge item(s) as the line items that represent the subsequent Subscription and saved in pending approval status.
 - Subscription Creation MR Script is executed (either scheduled or manually).
- Originating Sales order lines are closed and results in a closed transaction.
- New Sales order is created in a pending fulfillment status.
 - A new billing account is created on the customer record utilizing a standardized naming convention and is used on Subscription when created.
 - Each Other Charge Item(s) line results in a new Subscription created and assigned to the New Sales order on the line level.
 - Native Netsuite Subscription rules with Subscription Plan and related Service Items is utilized in this solution.
 - Other Charge Item contains the default Subscription Plan, Price Book, Price Plan and Billing Schedule and is selected automatically with scripting.
 - If the pricing varies from the Default price, then the pricing from the original line item is used and replaces the default price.
 - Start date of transaction uses the start date from the SO transaction.
 - If there is a snub date, then associated monthly initial term is used.
 - If there is a snub start date that is mid-month, will move start date to 1st of that month.
 - If there is a default add-on, or stand-alone, item designated on the Service Item (not to exceed the types listed below), then this item is added in the same quantity as the Service Item it relates to. The price can be derived from the item record and price level of customer or set at a hard-coded specific rate.
 - Assembly
 - Kit
 - Inventory Item
 - Non-Inventory Item
 - Service
 - If there is a Discount on the header level of the Originating Sales order transaction, then the New Sales order takes the discount and converts it to the line level across items.
 - Distribution of discount corresponds to the value per line item and will not be distributed to any line with a value greater than 0.00.
 - Any rounding variances go to the first line item on the transaction with a value greater than 0.00.
 - Discounts are shown on the amount field at the line level to avoid rounding variations at the rate field.
 - Discounts on subscription lines are carried over to the Subscription as the discount amount.
 - The Ship to address, ship method and any shipping taxes are copied from the original sales order transaction.
 - If you are using multiple ship to functionality, the solution does have the ability to pull this from the other charge item line level on the original sales order and utilize on the service item and fulfillable item line level on the new sales order.
 - Subscription is created leveraging native Netsuite Subscriptions functionality using elements described above.
 - Billing schedules need to be implemented and created prior to implementation of Subscription creation scripting use in accordance to Netsuite SuiteBilling standards.
 - Each subscription created is tied to the New Sales order and is NOT a stand-alone subscription.
 - Subscription is created in a pending activation status.



NEW BILLING ACCOUNT CREATED ON CUSTOMER RECORD

Billing Account

Primary Information

ACCOUNT NUMBER
2847
SUBSIDARY
Parent Company
 CUSTOMER DEFAULT
CUSTOMER
C002199 TEST - DO NOT SHIP

NAME
BA_C002199_16271
ACCOUNT DESCRIPTION
CURRENCY
USA

Billing

BILLING SCHEDULE
Standard Billing Schedule - 1 yr term
FREQUENCY
Annually
 USE OFF-CYCLE INVOICE FOR ADVANCE CHARGES
START DATE
11/15/2023

LAST BILL CYCLE DATE
NEXT BILL CYCLE DATE
11/15/2023
LAST BILL DATE

Classifications

CLASS

LOCATION
Santa Ana

INACTIVE

Related Records Address Preferences System Notes

Subscriptions Billing Schedule Off Cycle request Charges Transactions

view Billing Account Details

Customs View

EDIT	VIEW *	BILLING ACCOUNT	NAME	SUBSCRIPTION PLAN	START DATE	END DATE	STATUS	LAST BATTING BIRTH STATUS	80 LEADCY START
Edit	View	BA_C002199_16271	SP1CPK450-C-11/15/2023	SP1CPK450-C	11/15/2023	11/14/2024	Active	Success	
Edit	View	BA_C002199_16271	SP1CPK450-C-11/15/2023	SP1CPK450-C	11/15/2023	11/14/2024	Active	Success	
Edit	View	BA_C002199_16271	SP1CPK450-C-11/15/2023-1	SP1CPK450-C	11/15/2023	11/14/2024	Active	Success	
Edit	View	BA_C002199_16271	SP1CPK450-C-11/15/2023-1	SP1CPK450-C	11/15/2023	11/14/2024	Active	Success	
Edit	View	BA_C002199_16271	SP1CPK450-C-11/15/2023-2	SP1CPK450-C	11/15/2023	11/14/2024	Active	Success	
Edit	View	BA_C002199_16271	SP1CPK450-C-11/15/2023-2	SP1CPK450-C	11/15/2023	11/14/2024	Active	Success	
Edit	View	BA_C002199_16271	SP1CPK450-C-11/15/2023-3	SP1CPK450-C	11/15/2023	11/14/2024	Active	Success	
Edit	View	BA_C002199_16271	SP1CPK450-C-11/15/2023-3	SP1CPK450-C	11/15/2023	11/14/2024	Active	Success	

Actions*

Edit Cancel Next Bill

RELATED CUSTOMER DEPOSIT CREATED

If Customer Deposit Script Add-on is implemented, a new Customer Deposit is created on the New Sales order transaction in the same amount as the original deposit and assigned to the New Sales order.

[Transactions](#)

[Lists](#)

[Reports](#)

[Analytics](#)

[Documents](#)

[Setup](#)

[Customization](#)

[Commerce](#)

[Connector](#)

[Analytics](#)

[Amazon](#)

[SalesApps](#)

[Support](#)

Customer Deposit

CD013413 NOT DEPOSITED

[Edit](#) [Back](#) [Apply](#) [Actions](#)

[Actions](#)

← → List Search Custom

RELATED CUSTOMER DEPOSIT CREATED FROM ORIGINAL CUSTOMER DEPOSIT/ ORIGINAL ORDER

Primary Information

<p>CUSTOMER: CD02191TEST - DO NOT SHIP</p> <p>SALES ORDER: CD013413</p> <p>Sales Order #00037484</p> <p>ORDER DATE: 11/15/2023</p> <p>ORDER AMOUNT: 431.80</p> <p>PAYMENT AMOUNT: 431.80</p>	<p>DATE: 11/15/2023</p> <p>POSTING PERIOD: Nov 2023</p> <p>ACCOUNT: 1000944449</p> <p>TYPE: Suspended Funds</p>
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Classification

<p>SUBSIDIARY: Parent Company</p> <p>DEPARTMENT: USA</p> <p>CURRENCY: USA</p>	<p>CLASS: CREDIT CARD USED</p> <p>LOCATION: 100</p>
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Payments Method Applied To Relationships Communication System Information Custom GL Impact R2 Payments 6/41

PAYMENT OPTION: Cash

Payment Events 82P External Payment Event

DATE	TRANSACTION	EVENT	HANDLING MODE	PAYMENT OPTION	RESULT	REASON	AMOUNT	VIEW DETAILS
11/15/2023 4:30 pm	Customer Deposit #CD013413	Sale	Record External Event	Cash	Accept	Operation was successful	431.80	View

[Edit](#) [Back](#) [Apply](#) [Actions](#)



ITEM FULFILLMENT

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Item Fulfillment

IF032086 C002199 TEST - DO NOT SHIP **SHIPPED**

[Edit](#) [Back](#) [Print](#) [Actions](#)

Primary Information

REF. NO. IF032086
 CUSTOMER C002199 TEST - DO NOT SHIP
 SHIP WITH ORDERS

CREATED FROM Sales Order #50037484
 DATE 11/21/2023
 IMPORT RESOURCE Magenta
 STOREMENT ORDER NO. 100594549

POSTING PERIOD Nov 2023
 MEMO
 CUSTOMER PHONE (714) 448-6905
 STATUS Shipped

Items	Shipping	Packages	Relationships	Communication	System Information	Custom	GL Impact	ETail	8Q Payments	ON HAND	QUANTITY	UNITS	DEP SHIP PO	OPTIONS	UDF1	UDF2	ETAIL ORDER LINE ID
JOB		ITEM	DESCRIPTION														
		CA50-C	California & Federal Labor Law Posters-C							478	2	EA					
		AZ50-C	Arizona & Federal Labor Law Posters-C							1	3	EA					

ITEM FULFILLMENT IN SHIPPED STATUS



NEW SALES ORDER CLOSED

- Home
- Activities
- Transactions
- Lists
- Reports
- Analytics
- Documents
- Setup
- Customization
- Commerce
- Connector
- Avalara
- Amazon
- SuiteApps
- Support

Allocation Alert
 One or more order lines are not scheduled to be fulfilled by the Supply Required By Date.

Sales Order

S0037484 C002199 TEST - DO NOT SHIP

- Edit
- Back
- Authorize Return
- 8Q Authorize Card
- 8Q Collect Payment
- CLOSED**
- Actions

Primary Information

ORDER # S0037484
 CUSTOMER C002199 TEST - DO NOT SHIP
 DATE 11/15/2023
 START DATE 11/15/2023
 END DATE

PO #
 SALES CHANNEL
 MEMO
 FOR INVOICE GROUPING

Sales Information

SALES REP
 SALES EFFECTIVE DATE 11/15/2023
 SOURCE Web Services

Classification

SUBSIDIARY Parent Company
 DEPARTMENT
 CLASS
 LOCATION

CLOSED STATUS ON NEW SALES ORDER





SUBSCRIPTION CREATED AND ACTIVATED

**SUBSCRIPTION CREATED AND ACTIVATED
WITH CORRECT QTY, ITEMS, DATE AND VALUE**

- Home
- Activities
- Transactions
- Lists
- Reports
- Analytics
- Documents
- Setup
- Customization
- Commerce
- Connector
- Aviara
- Amazon
- SuiteApps
- Support

Subscription

[Edit](#) | [Back](#) | [Activate](#) | [Modify Pricing](#) | [Actions](#)

Primary Information

SUBSCRIPTION ID	8650	BILLING ACCOUNT	C002199_2847_BA_C002199_16271
SUBSCRIPTION NAME	SP1CPCASO-C - 11/15/2023 - 1	STATUS	Active
CUSTOMER	C002199 TEST - DO NOT SHIP	SUBSIDIARY	Parent Company

Plan and Term

SUBSCRIPTION PLAN	SP1CPCASO-C	START DATE	11/15/2023
PRICE BOOK	PB1CPCASO-C	END DATE	11/14/2024
INITIAL TERM	Standard 1 Year	NEXT RENEWAL START DATE	

Billing Account

BILLING SCHEDULE	Standard Billing Schedule - 1 Yr Term	START DATE	11/15/2023
BILLING FREQUENCY	Annually	LAST BILL CYCLE DATE	
8Q LEGACY START DATE		NEXT BILL CYCLE DATE	11/15/2023
8Q SHIP ADDRESS		LAST BILL DATE	
8Q AFFILIATED FULFILLMENT ITEM (2)			

- Lines
- Renewal
- Subscription Change Orders
- Related Records
- System Information

Line #	Item	Description	Class	Quantity	Unit Price	Total Value	Start Date	End Date
1	SP1CPCASO-C	Recurring In Advance	Subscriptions	2	\$155.88	\$311.76	11/15/2023	11/14/2024
		ACTIVE						
		Class	Subscriptions					
		Department	Santa Ana					
		Location						

11/15/2023 - 11/14/2024 (Active)

Total Interval Value	155.88
Recurring Amt	\$155.88
Qty	2
Pricing Tiered	
Discount	\$0.00
Charged	Annually
Repeat Every	1 Year

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