

Subscription Management Module

(Odoo version –8, 9 10 & 11)

Version: 1-01

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Presented by Globalteckz Team
www.globalteckz.com



Version Control Log

Version Author Description of Changes Date

Odoo Version	Author	Document Name
8, 9, 10 and 11	Globalteckz	Subscription Management Module

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Originated in India.



Subscription Management Module

Recurring Billing and Subscription Management get smarter with Odoo version 10

Managing customer subscriptions is a piece of cake with Globalteckz Subscription Module ! Globalteckz Subscriptions is your definitive recurring billing and subscription management solution. Effortlessly manage the entire customer life cycle, Billing, invoicing, reminder emails from accepting recurring payments to handling customer subscriptions. Subscription Management module of Globalteckz is crafted specifically to manage end-to-end subscription management platform with the capabilities and insights you need to grow a healthy subscription business and create customers for life.

Odoo 10 Subscription Management

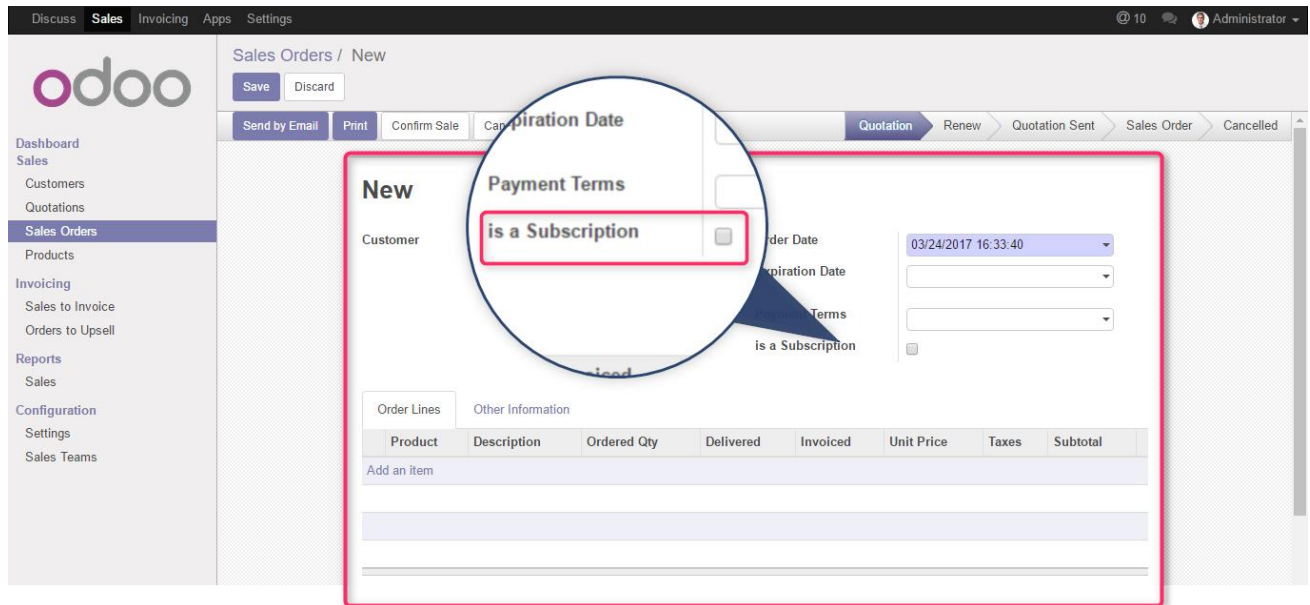
This module provides you with following features

- Get installation in minutes.
- Automate billing and save time.
- Payments made easy.
- Invoicing and recurring reminders get easy.
- Further Customizable.

Following are the list of features with screenshots

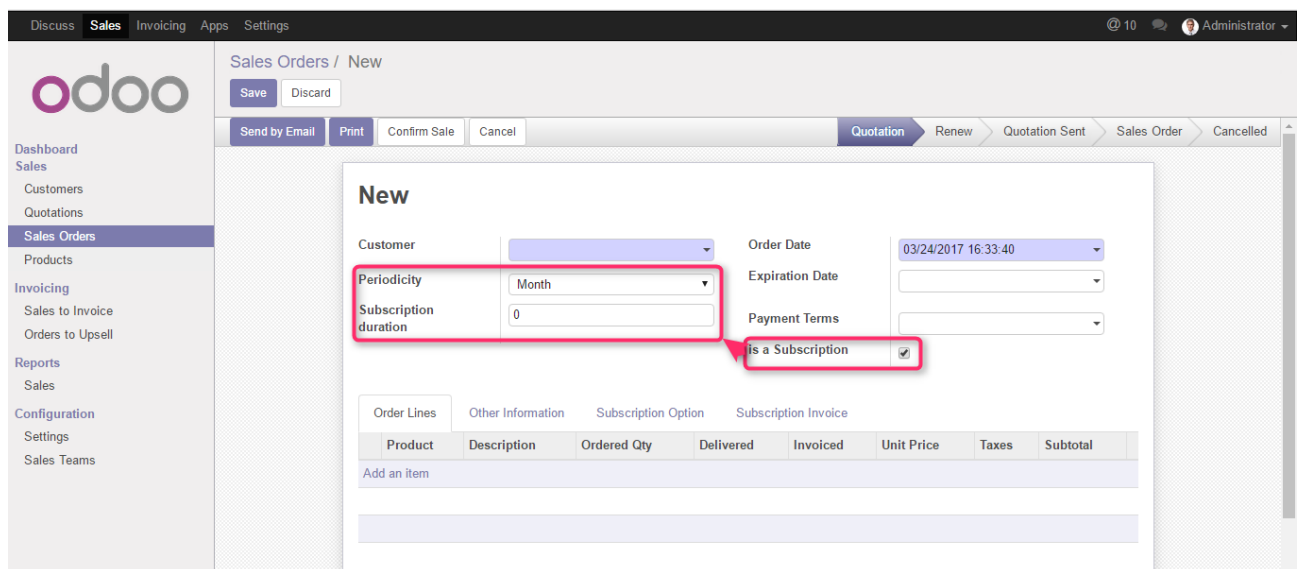
In the below screenshot we start preparing the sales order – By going into sales management module > Sales Order and “Create Button”

After installation of the subscription management module you can see that there is a checkbox whether it’s a subscription or not.



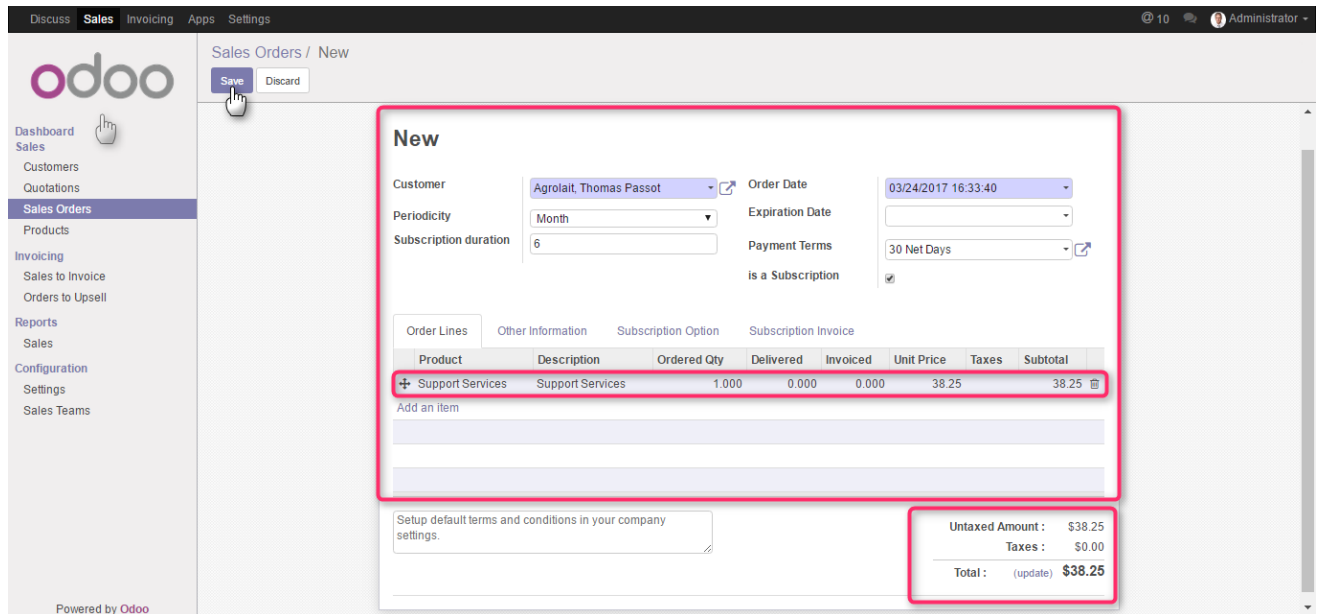
The screenshot shows the Odoo 'Sales Orders / New' form. A red box highlights the 'is a Subscription' checkbox under the 'Payment Terms' section. A blue circle and arrow point to this checkbox. The form includes fields for Customer, Order Date (03/24/2017 16:33:40), Expiration Date, and Payment Terms. Below these fields is a table for 'Order Lines' with columns: Product, Description, Ordered Qty, Delivered, Invoiced, Unit Price, Taxes, and Subtotal. The 'Add an item' button is visible below the table.

Once you check box it’s a subscription 2 new fields will be opened up where you can mention the periodicity and subscription duration.



The screenshot shows the Odoo 'Sales Orders / New' form with the 'is a Subscription' checkbox checked. Two new fields, 'Periodicity' (set to 'Month') and 'Subscription duration' (set to '0'), are now visible and highlighted with a red box. The form also shows the 'Order Date' (03/24/2017 16:33:40), 'Expiration Date', and 'Payment Terms' fields. Below these fields is a table for 'Order Lines' with columns: Product, Description, Ordered Qty, Delivered, Invoiced, Unit Price, Taxes, and Subtotal. The 'Add an item' button is visible below the table.

After filling all the information you can see that every month billing amount is generated based on the services you select.



Odoo Sales Orders / New

Customer: Agrolait, Thomas Passot | Order Date: 03/24/2017 16:33:40

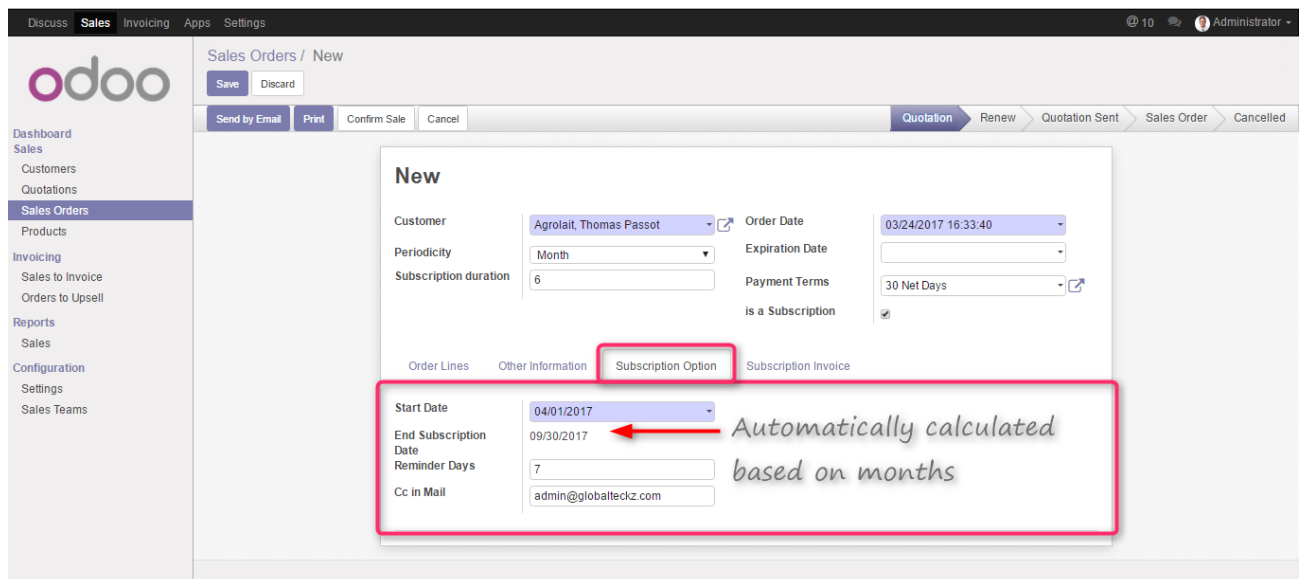
Periodicity: Month | Expiration Date: | Payment Terms: 30 Net Days

Subscription duration: 6 | is a Subscription: ☒

Product	Description	Ordered Qty	Delivered	Invoiced	Unit Price	Taxes	Subtotal
Support Services	Support Services	1.000	0.000	0.000	38.25		38.25

Summary: Untaxed Amount: \$38.25, Taxes: \$0.00, Total: (update) \$38.25

There is another menu named as Subscription option where you can select the start date of the subscription and based on the number of months selected the end Subscription date will get calculated. You can also add the reminder email to the customer for the payments including marking cc to another person in the organization for follow up



Odoo Sales Orders / New

Customer: Agrolait, Thomas Passot | Order Date: 03/24/2017 16:33:40

Periodicity: Month | Expiration Date: | Payment Terms: 30 Net Days

Subscription duration: 6 | is a Subscription: ☒

Subscription Option

Start Date: 04/01/2017 | End Subscription Date: 09/30/2017 | Reminder Days: 7 | Cc in Mail: admin@globalteckz.com

Automatically calculated based on months

After filling all the information you can click on the save button

Discuss Sales Invoicing Apps Settings

10 Administrator

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Sales Orders / New

Save Discard

Send by Email Print Confirm Sale Cancel Quotation Renew Quotation Sent Sales Order Cancelled

New

Customer: Agrolait, Thomas Passot Order Date: 03/24/2017 16:33:40

Periodicity: Month Expiration Date:

Subscription duration: 6 Payment Terms: 30 Net Days

is a Subscription: ☒

Order Lines Other Information Subscription Option Subscription Invoice

Start Date: 04/01/2017

End Subscription Date: 09/30/2017

Reminder Days: 7

Cc in Mail: admin@globalteckz.com

There is a button where you can process the invoicing part which you can click to check the invoicing dates and processing.

Discuss Sales Invoicing Apps Settings

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Sales Orders / SO011

Edit Create Print Action

Create Invoice Print Send by Email Lock Subscription Invoice Quotation Renew Quotation Sent Sales Order Cancelled

Subscription Renew

Lock Subscription Invoice

Confirmation Date: 03/24/2017 16:38:32

Payment Terms: 30 Net Days

is a Subscription: ☒

Order Lines Other Information Subscription Option Subscription Invoice

Start Date: 04/01/2017

End Subscription Date: 09/30/2017

Reminder Days: 7

Cc in Mail: admin@globalteckz.com

Powered by Odoo

Here in the below image you can see the invoicing amount calculated based on the service cost. You can click on create invoice to view the invoices

Discuss Sales Invoicing Apps Settings 10 Administrator

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Sales Orders / SO017

Edit Create Print Action

Create Invoice Print Send by Email Cancel Lock Subscription Renew Quotation Quotation Sent Sales Order Cancelled

SO017

Customer Agrolait, Thomas Passot
69 rue de Namur
1300 Wavre
Belgium

Confirmation Date 03/24/2017 17:39:38

Payment Terms 30 Net Days

is a Subscription ☒

Periodicity Month

Subscription duration 6

Order Lines	Other Information	Subscription Option	Subscription Invoice
Subscription No	From Date	To Date	Subscription Amount
1	04/01/2017	04/30/2017	38.25 Create Invoice
2	05/01/2017	05/31/2017	38.25 Create Invoice
3	06/01/2017	06/30/2017	38.25 Create Invoice
4	07/01/2017	07/31/2017	38.25 Create Invoice
5	08/01/2017	08/31/2017	38.25 Create Invoice
6	09/01/2017	09/30/2017	38.25 Create Invoice

As seen in the below image you can click on view invoices

Discuss Sales Invoicing Apps Settings 10 Administrator

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Sales Orders / SO017

Edit Create Print Action

Create Invoice Print Send by Email Cancel Lock Subscription Renew Quotation Quotation Sent Sales Order Cancelled

SO017

Customer Agrolait, Thomas Passot
69 rue de Namur
1300 Wavre
Belgium

Confirmation Date 03/24/2017 17:39:38

Payment Terms 30 Net Days

is a Subscription ☒

Periodicity Month

Subscription duration 6

Order Lines	Other Information	Subscription Option	Subscription Invoice
Subscription No	From Date	To Date	Subscription Amount
1	04/01/2017	04/30/2017	38.25 View Invoice
2	05/01/2017	05/31/2017	38.25 Create Invoice
3	06/01/2017	06/30/2017	38.25 Create Invoice
4	07/01/2017	07/31/2017	38.25 Create Invoice
5	08/01/2017	08/31/2017	38.25 Create Invoice
6	09/01/2017	09/30/2017	38.25 Create Invoice

After scrutinizing the invoice you can validate the invoice by clicking on validate button

Discuss Sales Invoicing Apps Settings

Administrator

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Sales Orders / SO017 / Invoice

Edit Create

Print Action

1 / 1

Validate

Draft Open Paid

Dashboard

Sales

Customers

Quotations

Sales Orders

Products

Invoicing

Sales to Invoice

Orders to Upsell

Reports

Sales

Configuration

Settings

Sales Teams

Draft Invoice

Customer

Agrolait, Thomas Passot

69 rue de Namur

1300 Wavre

Belgium

Invoice Date

04/01/2017

Salesperson

Administrator

Sales Team

Direct Sales

Payment Terms

30 Net Days

Invoice Lines

Other Info

Product	Description	Quantity	Unit Price	Tax Price	Amount
Support Services	Support Services	1.000	38.25	0.00	\$ 38.25

Untaxed Amount : \$38.25

Tax : \$0.00

Total : \$38.25

Here is the invoice which has been raised to the customer with the Due date

odoo

My Company Tagline

YourCompany

1725 Slough Ave.

Scranton PA 18540

United States

Agrolait, Thomas Passot

69 rue de Namur

1300 Wavre

Belgium

Invoice INV/2017/0009

Invoice Date: 04/01/2017

Due Date: 05/01/2017

Description	Quantity	Unit Price	Taxes	Tax Excluded Price
Support Services	1.000	38.25		\$ 38.25
Subtotal				\$ 38.25
Total				\$ 38.25

Payment term: 30 Net Days

You can also Renew the subscription with one click without any rework for the same customer

The screenshot shows the Odoo web interface for Sales Orders. The left sidebar contains navigation links: Dashboard, Sales, Customers, Quotations, Sales Orders (highlighted), Products, Invoicing, Sales to Invoice, Orders to Upsell, Reports, Sales, Configuration, Settings, and Sales Teams. The main header shows 'Sales Orders / SO017' with buttons for 'Edit' and 'Create'. Below the header is a toolbar with buttons: 'Create Invoice', 'Print', 'Send by Email', 'Cancel', 'Lock', 'Subscription Renew' (highlighted with a red circle and a blue callout arrow), 'Quotation', 'Quotation Sent', 'Sales Order', and 'Cancelled'. The 'Subscription Renew' button is also highlighted with a red rectangle. The main content area displays details for a subscription, including 'Confirmation Date' (03/24/2017 17:39:38), 'Payment Terms' (30 Net Days), and 'is a Subscription' (checked). Below this is a table with tabs: 'Order Lines', 'Other Information', 'Subscription Option', and 'Subscription Invoice'. The 'Order Lines' tab is active, showing a table with columns: Product, Description, Ordered Qty, Delivered, Invoiced, Unit Price, Taxes, and Subtotal. The table contains one row: Support Services, Support Services, 1.000, 0.000, 0.000, 38.25, and 38.25.

We have other specific version connectors too that performs similar functions such as



About GlobalTeckz

At GlobalTeckz we offer our clients with world class Business and Enterprise solutions, we are a company of Experienced Professionals holding many years of expertise in implementing OpenERP, Magento, and Joomla for our clients across the globe.

GlobalTeckz is currently having the presence in India. We offer Business solutions to ensure smooth working of client's business processes at competitive prices. Our teams have many years of experience in handling business application with best methodology.

We Analyze – Develop – Implement –Support the Enterprise grade business software to assure successful implementations of ERP solutions specific serving manufacturing, Trading, eCommerce and Service Verticals. Globalteckz is an official Odoo partner.

Our Development team is based in India and worked round the clock to provide flexibility in communication. Our Open source Business software implementations specially crafted for Small and Mid Sized Businesses.

We believe in excellent customer services during and after implementation. We not even offer you with these solutions but also help you in consulting & selecting the best suitable solutions for your business.

We use latest implementation & development methodology to ensure quality and timely implementation which meets the needs of our customers.



GlobalTeckz
Mumbai, India

To learn more visit
www.globalteckz.com

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