



SUBSCRIPTION MANAGEMENT APP USER GUIDE

Latest Version

27/8/2024

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1 INTRODUCTION

Subscription Management by MDC Nordic is a solution designed for Microsoft Dynamics 365 Business Central Online, that lets you Manage your recurring sales and subscription-based business the easy way.

It can help you register and maintain customer subscriptions and enables you to easily create invoices and orders inside Dynamics 365 Business Central.

Any business type could benefit from Subscription Management. Use it for periodic rentals, IT-services, licenses, memberships, garden services, newspaper subscriptions etc.

Built directly inside Business Central, Subscription Management by MDC Nordic provides a seamless user experience for all users, both new and experienced. It's easy to set up and comes with multiple features to make your life easier.

2 INSTALL, ACTIVATE AND COMPLETE THE SUBSCRIPTION MANAGEMENT SETUP IN BUSINESS CENTRAL ONLINE

2.1 Install Subscription Management from Extension Marketplace

The Subscription Management solution can be installed directly from your Business Central tenant without even leaving the application. You must have super permission to complete the full installation and activation process. If you are in doubt about whether you have super permission or not, contact your Business Central Administrator, who can help you.

Let's get started!

In the Role Center, choose the search icon, enter **Extension Marketplace**, and then choose the related link.

Tell me what you want to do



Extension Marketplace

Go to Pages and Tasks

> Extension Marketplace

Administration

In the search bar, enter **Subscription Management by MDC Nordic**.

Select the **Subscription Management App**.

Click on the **Free Trial** button.



Subscription Management

MDC Nordic

★★★★★ (0) Write a review

Free trial

Overview Ratings + reviews

Free Trial

Products
Dynamics 365 Business Central

Publisher
MDC Nordic

Acquire Using
Work or school account

Version
1.21.0.47

Updated
6/19/2023

Categories
Sales
Customer Service

Products supported
Business Central Online
Business Central On-Prem

Support
Support
Help

Legal
License Agreement

Manage recurring sales and subscription based business the easy way.

Manage Customer Subscriptions and Subscription Invoicing easily and effectively.

Why use Subscription Management?

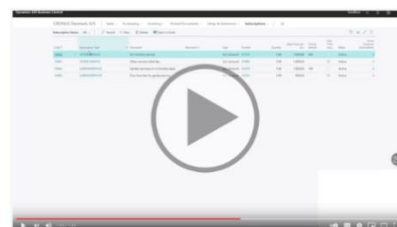
Do you keep a list of customer subscriptions in excel or do you spend a lot of time invoicing your customers the same service or item month after month? Or maybe you forget to invoice a customer? Or maybe you are about to start a subscription business to improve your customer relations and create recurring revenue for you? Subscription Management by MDC Nordic can help you register and maintain customer subscriptions and enables you to easily create invoices directly in Dynamics 365 Business Central.

Who can use Subscription Management?

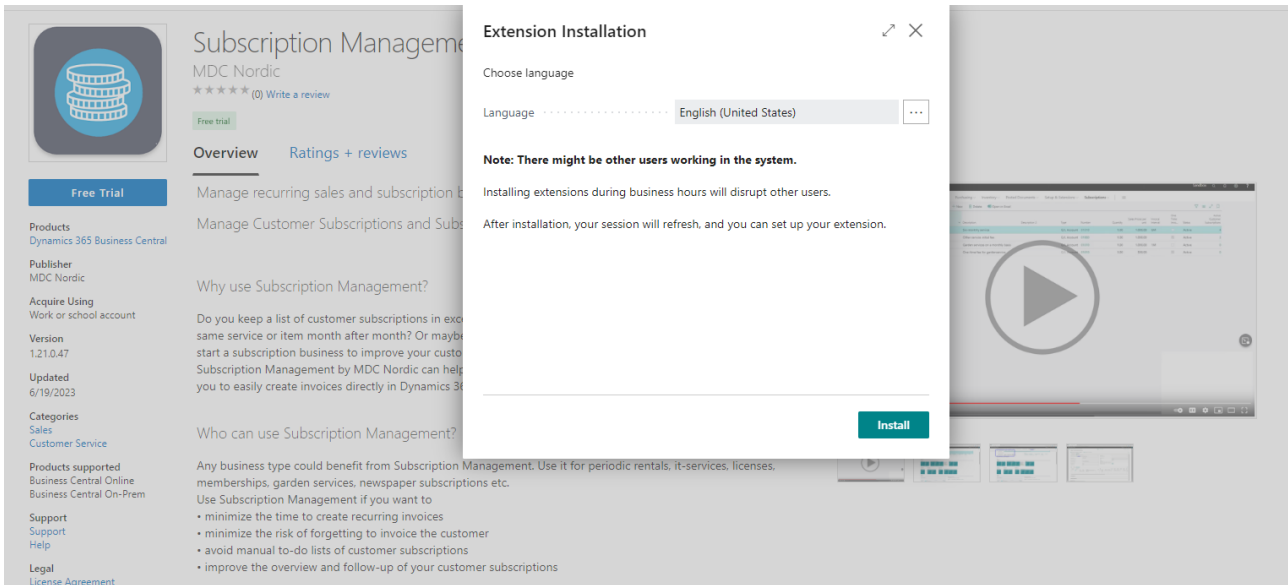
Any business type could benefit from Subscription Management. Use it for periodic rentals, it-services, licenses, memberships, garden services, newspaper subscriptions etc.

Use Subscription Management if you want to

- minimize the time to create recurring invoices
- minimize the risk of forgetting to invoice the customer
- avoid manual to-do lists of customer subscriptions
- improve the overview and follow-up of your customer subscriptions



A new page **Extension Installation** will open where you can select the language that you want this app to be installed in, on clicking the button with three dots. After selecting the language click the **Install** button at the bottom of the page to proceed with the installation.




After you click the **Install** button, the system will start with the Installation process, you may have to wait for a few moments for the installation process to be completed.

Installing app Subscription Management ↗ ✕

Installation might take a minute. You can work on other tasks while you wait and check the status later on the Extension Installation Status page.



Once the Installation is completed, you will see a message stating **“Your app is installed and ready to use”** and your browser will refresh automatically to reflect the changes made by this app.

 Your app is installed and ready to use.

OK

Note:

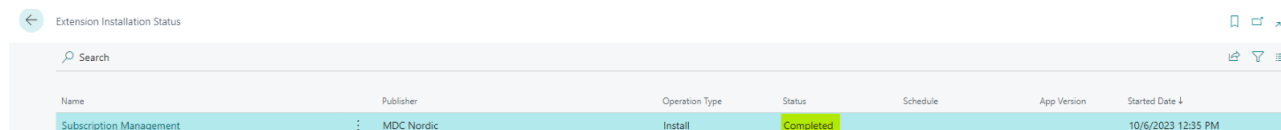
If the browser doesn't refresh on its own, make sure to refresh your browser. It's always a good idea to Sign out and Sign in again into business central.

If you close the above App Installation page, you can always check the status of the installation by following these steps.

Choose the search icon, enter **Extension Management**, and then choose the related link.

Select **Manage > Installation Status** to see the installation status.

The installation is completed when the status field says **Completed**.



Name	Publisher	Operation Type	Status	Schedule	App Version	Started Date
Subscription Management	MDC Nordic	Install	Completed			10/6/2023 12:35 PM

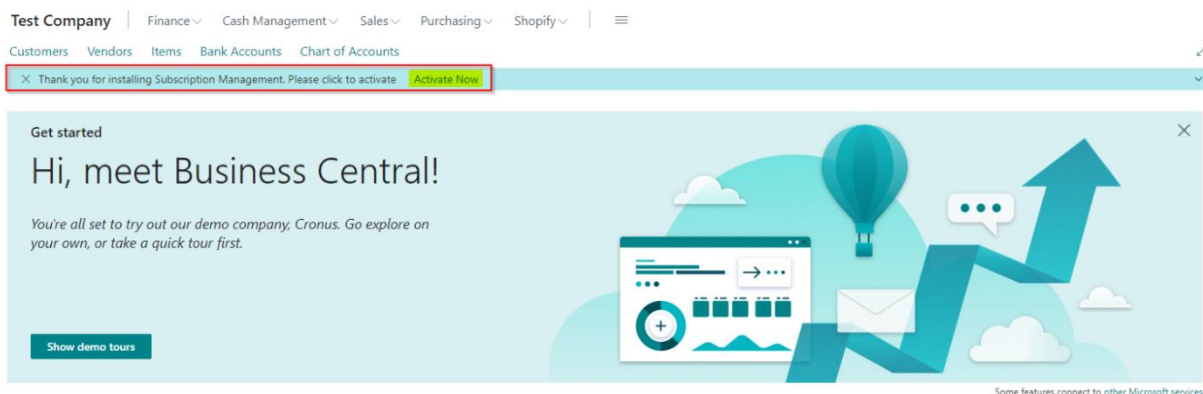
2.2 App Activation

Subscription Management has now been installed but not activated yet. The next steps are for activation of Subscription Management.

Important:

When you install Subscription Management, Stripe App (another MDC Nordic solution) is installed as well. Subscription Management requires this app for integration with Stripe to handle payments. You will not be charged additionally for any dependent app.

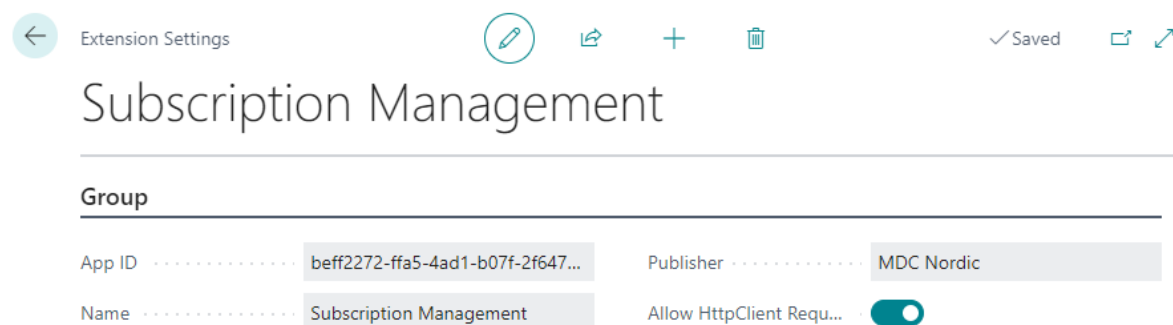
When signing into Business Central, a notification will appear at the top of your Role Center asking if you want to activate Subscription Management. Select **Activate Now** to start the activation.



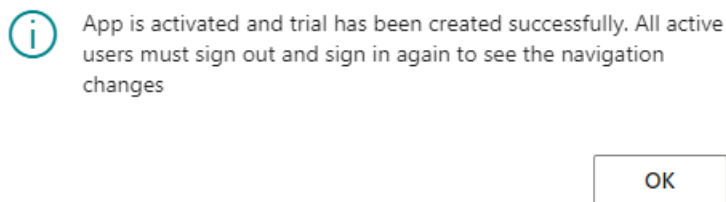
Note:

If you get a runtime error, make sure you have allowed both Subscription Management and Strip App to send Http client requests (this is for interaction with external API's and Services).

To turn on the Allow HttpClient Requests, search for **Subscription Management** and click the relevant link, a list of all the installed extension will be opened, search of **Subscription Management** click on it to open the card page and then turn on **Allow HttpClient Requests** toggle. Do the same for **Stripe App** as well.

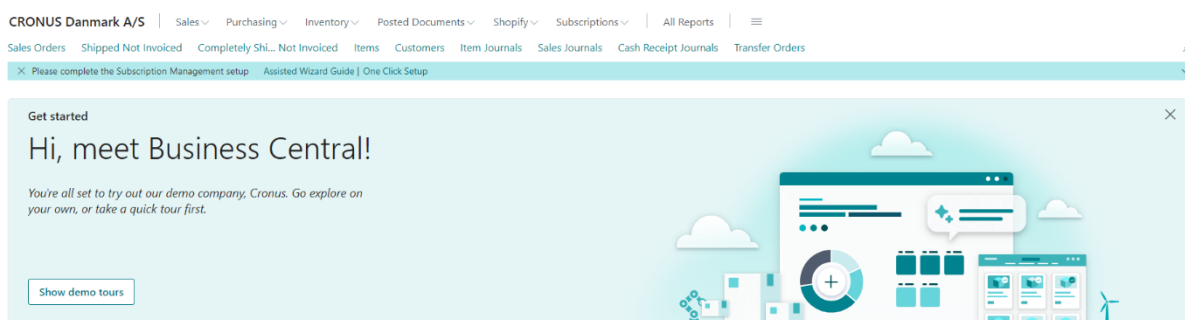


When the app is activated successfully, you will see the following success message on the screen.



2.3 Complete the Setup

When the app is activated, you will see another notification on the role center page asking you to complete the setup.



Here, you have two options.

Assisted Wizard Setup

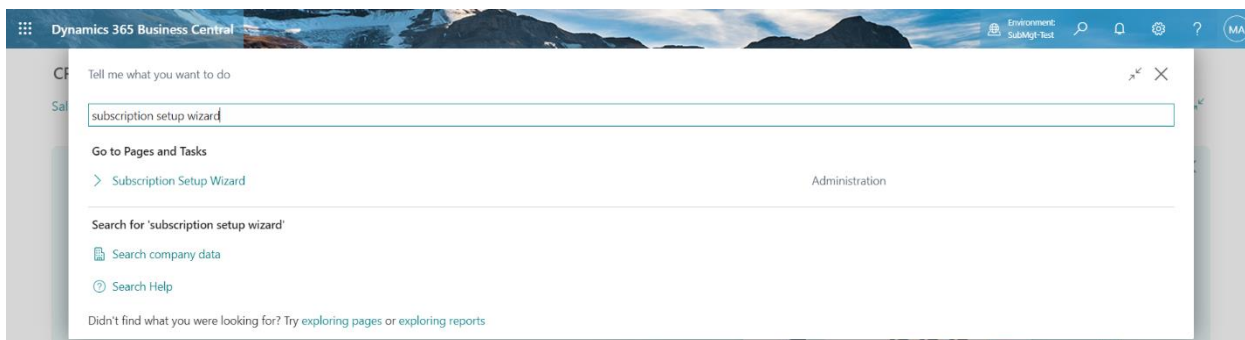
One Click Setup

2.3.1 Assisted Wizard Setup:

In Assisted Wizard Setup, you need to complete setup by going through a step-by-step wizard.

Click on the highlighted **Assisted Setup Wizard** and a wizard will open to complete the setup.

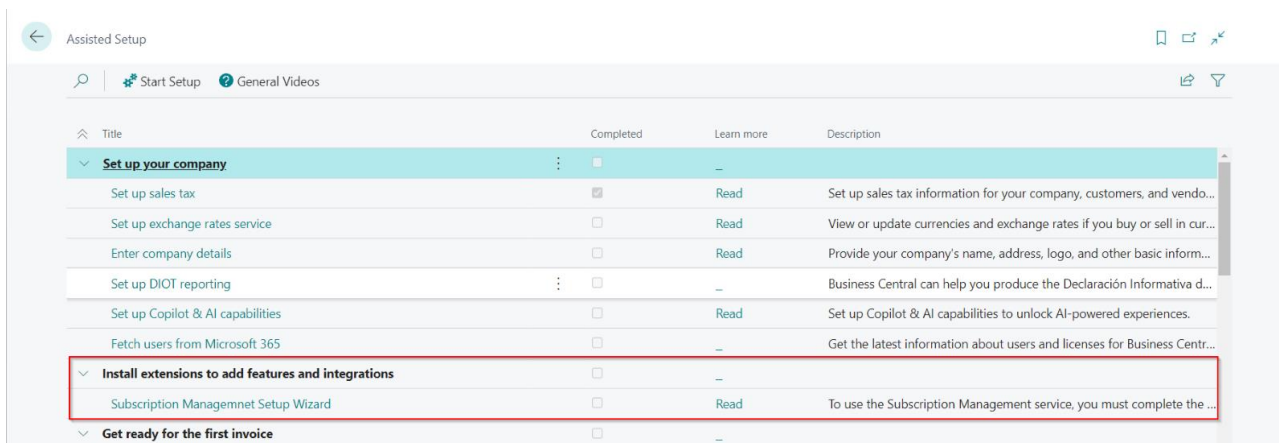
On the first page you will see all the **Setup Details** that you will be going to fill in.



Note:

If a notification doesn't appear, search for **Subscription Setup Wizard**, and click the relevant link to start the setup wizard.

You can also find **Subscription Setup Wizard** in Assisted Setup.



Subscription Setup Wizard



Welcome to Subscription Management Setup!

To use the Subscription Management, follow the assisted guide.

Setup Details

Following information is required in order to complete the setup:

- Number series for Subscription Items.
- Number series for Customer Subscriptions.
- Number series for Subscription Invoices.
- Number series for Posted Subscription Invoices.
- Number series for Subscription Shipments.
- Number series for Subscription Orders.
- Number series for Posted Subscription Invoices from Subscription Orders.
- Posting Description.
- External Document No.

Back

Next

Finish

Click the next button, on the next page you will be given an option to select **Existing** or **Create New** No. Series for Item.

Subscription Setup Wizard



Setup Subscription Item Nos. Series

Please select the option to choose the way you want to Setup the Subscription Item Nos. series for Subscription Management App.

Select Existing or Create New

Back

Next

Finish

If you select Existing and click next, you will be able to select the **No. Series** from the existing list of No. Series.

Subscription Setup Wizard

⚙️
↗️ ✕

Select the Subscription Item Nos. Series

Subscription Item Nos.

Code ↑	Description
A-BLK	Rammemontageorderer
AN-FORSKL.	Forsikringskladde
ANL	Anlæg
ANL-F.	Forsikring
ANL-KLD	Anlægskladde
+ New Select from full list	

Back
Next
Finish

If you select **Create New** you will be asked to enter some data for the new No. Series. Enter the data and click next.

Subscription Setup Wizard



Create New Subscription No. Series

Create new Subscription No. by providing values given fields below

Code	<input type="text" value="MDC-ITEMS"/>
Description	<input type="text" value="MDC Items"/>
Starting No	<input type="text" value="MDCITEMS00001"/>
Ending No	<input type="text"/>

When you click the next button, the system will create a new No. Series for you and ask you the same two options for setting No. Series for:

Customer Subscription

Subscription Invoice

Posted Subscription Invoice

Subscription Shipment

Subscription Order

Posted Subscription Invoice from Subscription Order

After the No. Series setup, wizard will give you the same two options for **Local Language Code** and **Reason Code** (Reason Code indicates why an entry was created).

Follow the same steps you did for No. Series setup.

Then, the wizard will ask you if you want to:

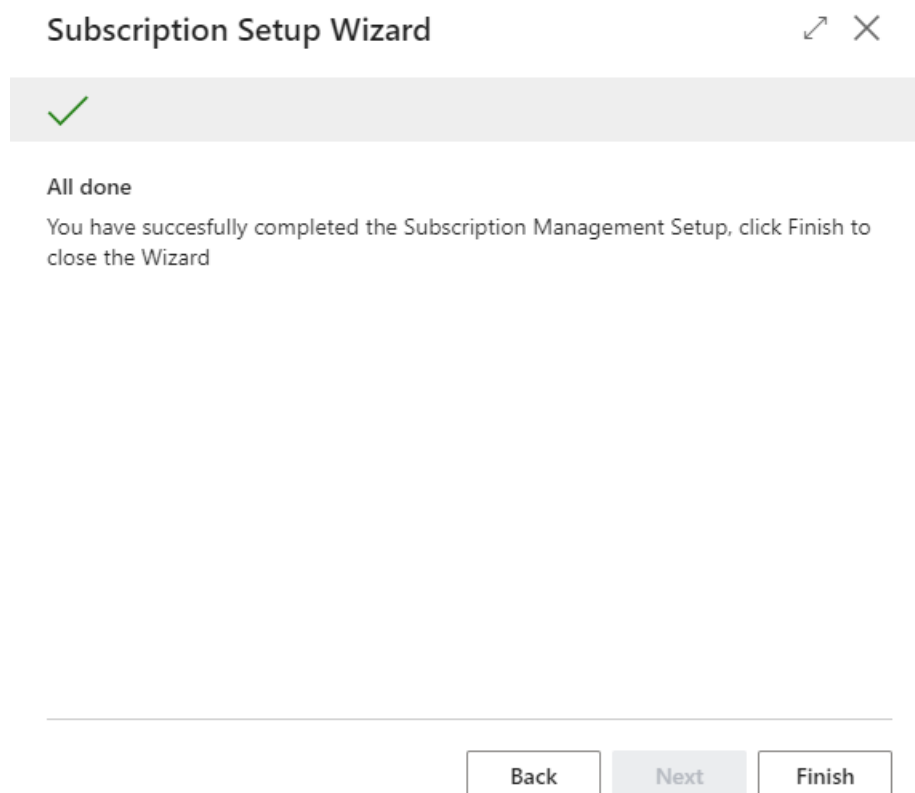
Transfer comments to subscription invoice/order

Prioritize subscription dimensions

Deactivate dialogues when subscription status changes

Then, the wizard will ask you to set up **Posting Description** and **External Document No.**

After that you will get the following screen and you are good to go, click **Finish** to complete the setup.



2.3.2 One Click Setup:

By choosing One Click Setup, the No. Series and other information will be automatically populated that is recommended by MDC Nordic. After it, you can view the setup page.



Setup successful. Do you want to view the Subscription Setup page?

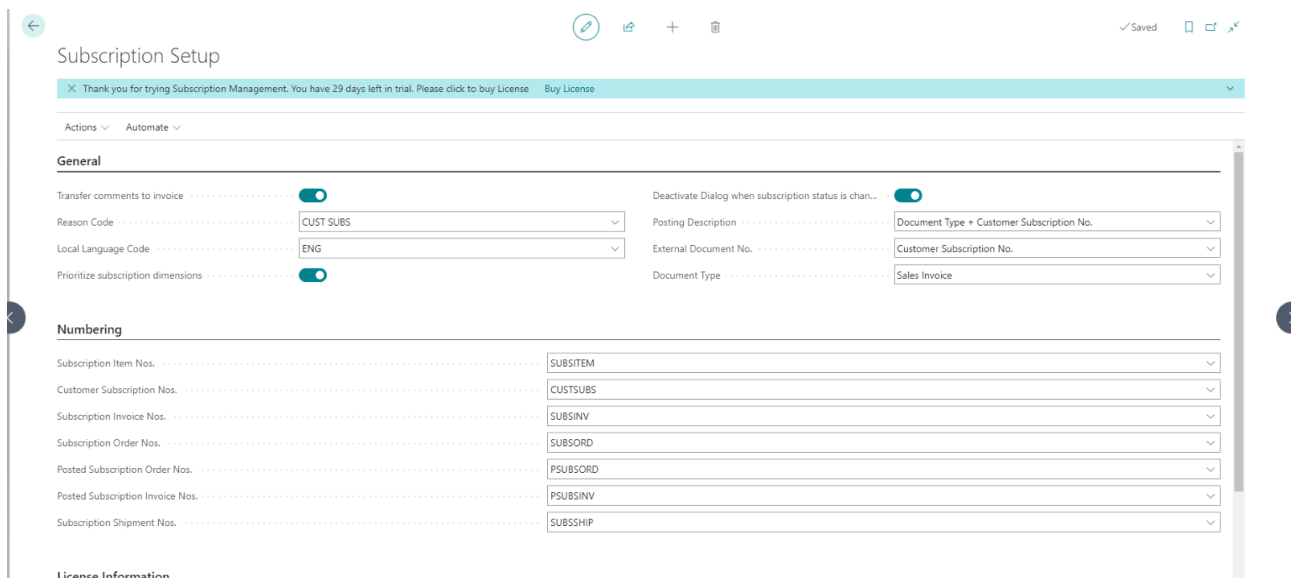
Yes No

You can view the setup page by clicking on **“Yes”**.

2.4 Subscription Setup (Page Overview)

If you want to have a look at the setup page, you can also search for **Subscription Setup** and open the relevant link.

A page like the one in the following screenshot will appear with all the details that you have filled in using the wizard page. You can also select Document Type i.e Sales Invoice, Sales Order on setup page. Remember that this feature is only available in Trial and Premium version. In Basic version, you can only create Sale Invoice.



In the **License Information** tab, you can see the **License Type, Status, Start Date, End Date** and other details about your license. Currently we are using the trial version, the status is set to **Trial** and **Amount** to 0.00.

License Information	
License email	
License Type	Premium Plan
Start Date	23/07/2024 12:56
End Date	22/08/2024 12:56
License interval	Month
Amount	0.00
Status	Trial
Customer Id	cus_QWgymb8DJUeEs
License Id	sub_1PfdaWC96HeW60leNixFP0T6
Cancel at period end	<input type="checkbox"/>
App Link	https://mdcnordic.com/apps/subscription-management/

On top of the page, you will see another notification to buy the license. If you have tried the app and it suits your needs, you can update your license by clicking the **Buy License** notification or on Actions and then Buy License. There is also an action added under actions that is **Refresh License**. This action fetches the information regarding license instantly.

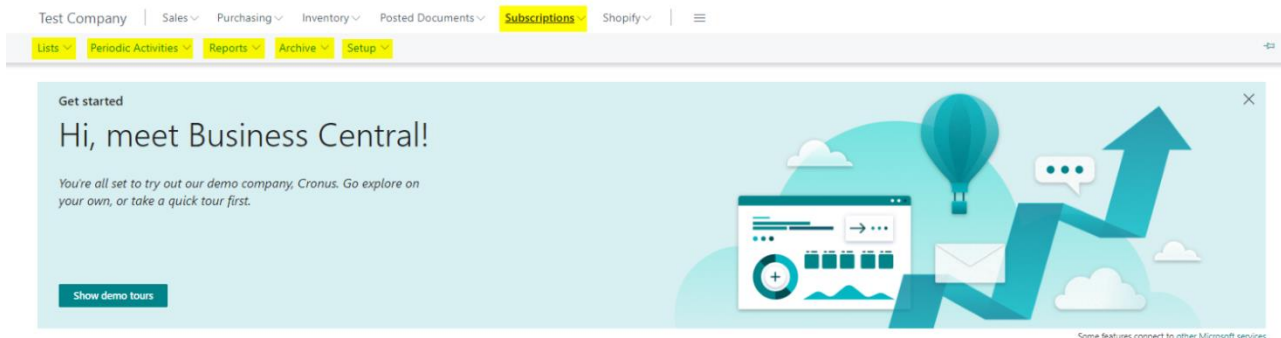
2.5 Choose a Role Center for Users

User Settings is a standard Business Central feature you can use to determine what's displayed on the Role Center page depending on a user's profile as well as other settings. You assign **Profiles** to users on the **User Setting** page. When Subscription Management is installed, activated, and setup properly, the Order **Processor Role Center** gets some new actions and shortcuts.

When you login to business central with **Sales Order Processor** profile, you will see a new menu called **Subscriptions** it further contains **Lists, Periodic Activities, Reports, Archive and Setup** sub menus, that basically helps the sales order processor to access all the features of the app from a single point.

Note:

You can change your Role by clicking the settings icon on top right corner of the page > **My Settings > Role > Sales Order Processor** and click OK.



3 SUBSCRIPTION MANAGEMENT COMES WITH DIFFERENT PLANS

3.1 Standard Plan

If you buy the Standard Plan of Subscription Management, you can:

Set up Subscription Management yourself to fit your business needs.

Set up as many customer subscriptions as you like.

Set up individual charging intervals for each customer's subscriptions.

Set up one-time subscriptions.

Plan and post subscription invoices automatically based on the customer subscriptions.

Be sure that customer subscriptions are automatically updated to the next invoicing date.

3.2 Premium Plan

In the Premium Plan Subscription Management, you can even:

Plan and post subscription orders automatically based on the customer subscriptions.

Create Subscription Types that are used to make different categories to filter the Subscriptions. Users can create multiple subscription types.

Create your own subscription items - an alias for a G/L Account, Item or Resource to improve your accounting.

Segment your subscription items in subscription types to improve follow-up.

Create subscription groups consisting of one or more subscription items. Entering a subscription group to a customer subscription will automatically create all the subscription items of the group, saving you a lot of time.

View a report that summarizes all the subscriptions.

Update Customer Master Data

4 STEPS TO CREATE YOUR FIRST SUBSCRIPTION AND EXPLORE THE APP

4.1 Subscription Types

Subscription Types are a simple way to categorize your different subscription items and you can create all the types you need. Subscription Types can be used for sorting or filtering.

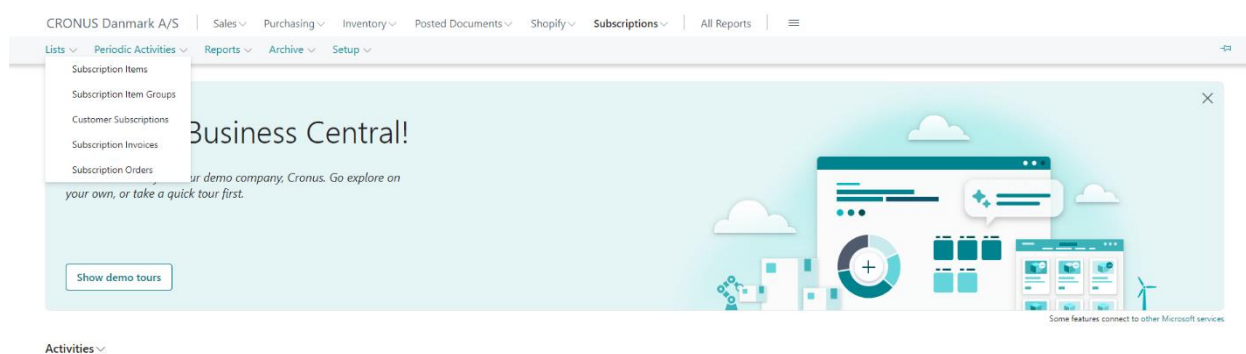
Subscription Types: All ▾		🔍 Search	+ New	🗑️ Delete	✎ Edit List	📄 Open in Excel
Code ↑	Description					
<u>EXTENDED SUBSCR.</u>	Extended subscription	⋮				
GARDENSERVICE	Garden services					
HOSTING	Hosting services					
LICENSE	License					
MAGAZINE 1	Magazine					
MEMBERSHIP	Membership of the association					

4.2 Subscription Items

If you have purchased a **Premium Plan**, then the first thing you must set up is subscription Items. This must be done before you can create a subscription item group or a customer subscription. The user must set up the subscription items with basic information.

To make a new subscription item:

Navigate to **Subscription Items** list page either from Role Center Page **Subscriptions -> Lists -> Subscription Items**



Or search **Subscription Items** from the global search on the top right corner

Note:

This page will only appear in the search if you have purchased **Premium Plan**.

On the list page when you click the **New** button another page i.e. **Subscription Item Card** will open.

Fill in the data about the Subscription Item you want to create. It can be a standard G/L Account, Item, or a Resource.

You can also define pricing for the new subscription item and add date formulas for invoicing. You can define interval for invoice in the field **Invoice Interval** that indicates how often you want to invoice. For every month type 1M, every week = 1W, every quarter = 1Q and every year = 1Y. If you want to invoice twice a month you can choose 15D etc.

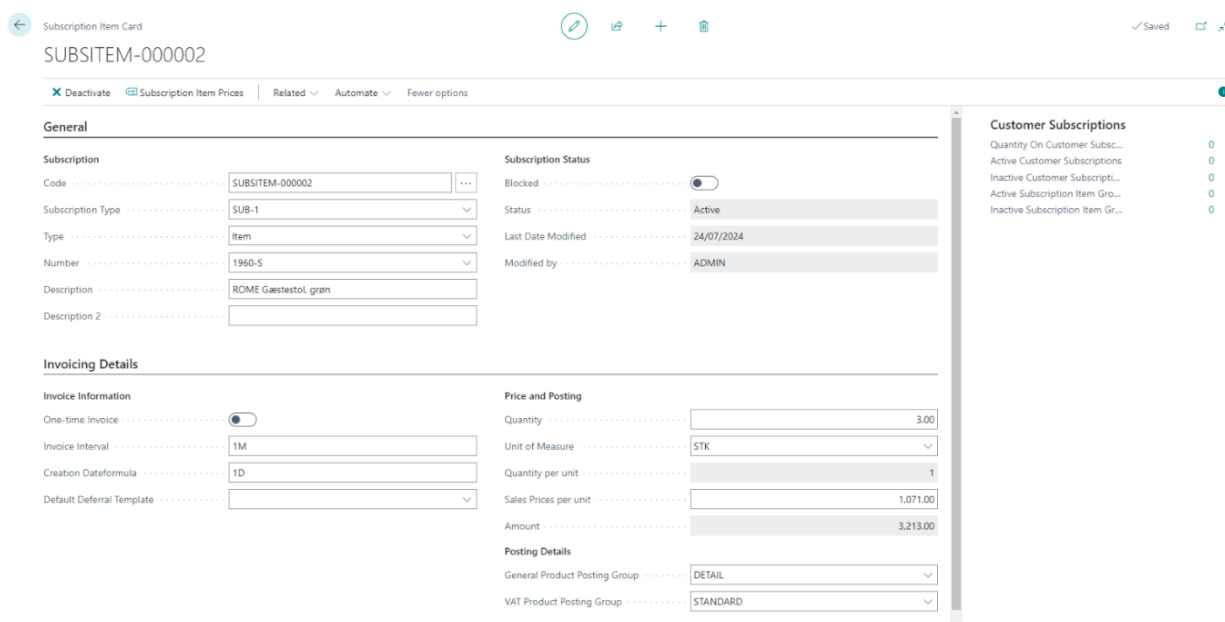
Create Dateformula is used to make the system create and calculate the following dates

Starting date, first invoicing date and next invoicing date. Choose +7D if the subscription must

be invoiced once, 7 days after the creation of the customer or subscription item group line. If you create a subscription that must only be invoiced once on the same date as the customer or subscription item group line is created, you must type 0D the same date is created in all the 3 fields. The dates can be changed manually accordingly.

Status of Subscription Item will be **Active** by default. But you need to insert all the required data before leaving the page, otherwise it will not allow you to leave the page. The required data you will fill in is Type, Number, Description and Quantity.

On the right side of the page, you can see a fact box page showing you different insights about the current item.

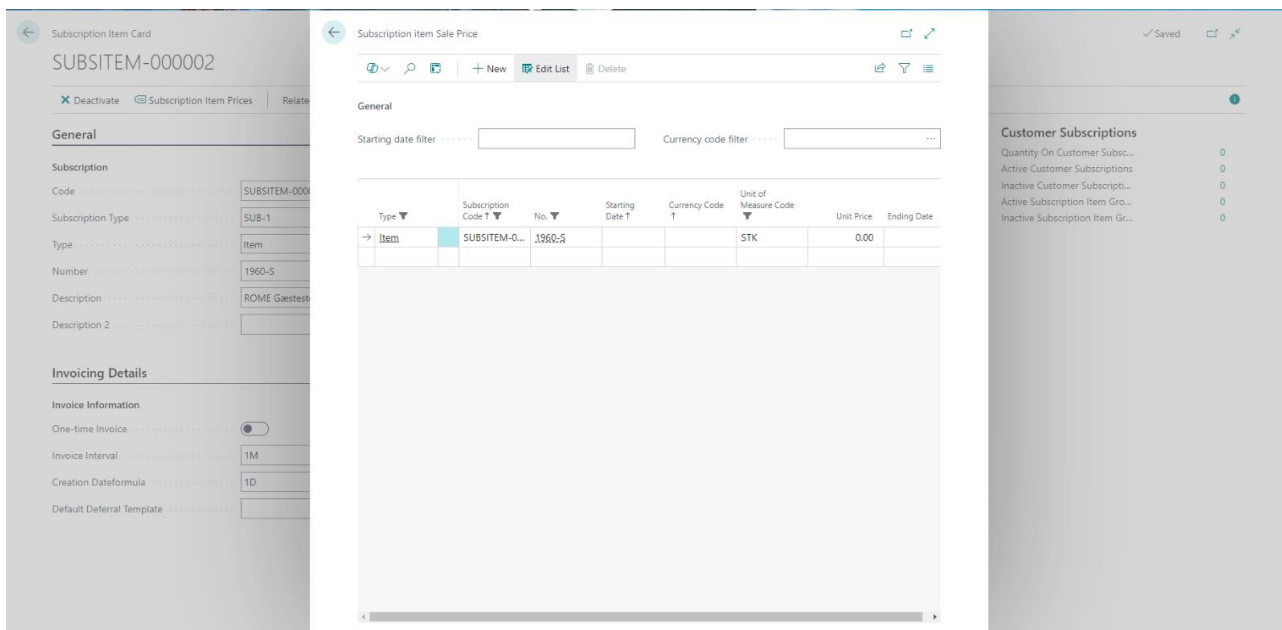


Metric	Value
Quantity On Customer Subsc...	0
Active Customer Subscriptions	0
Inactive Customer Subscriptions...	0
Active Subscription Item Gro...	0
Inactive Subscription Item Gr...	0

4.3 Subscription Item Prices

For every subscription item you can setup different prices in addition to a specific currency, start- and end date. The subscription item prices must be transferred to the subscription lines on the customer subscription based on the currency code on the actual customer and the date on the subscription line.

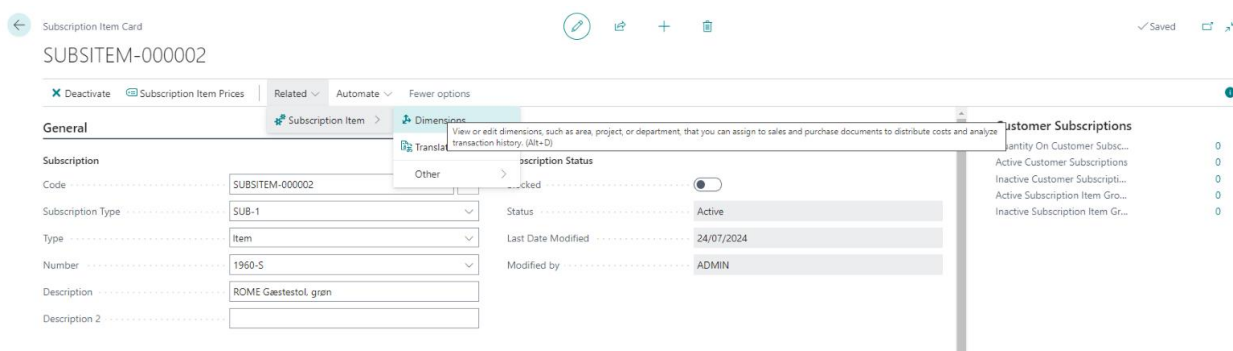
From the **Subscription Item Card** in the actions click on the **Subscription Item Prices** to open the **Subscription Item Sales Price** page.

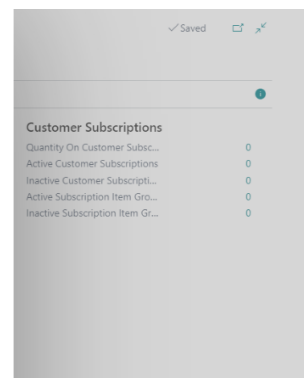
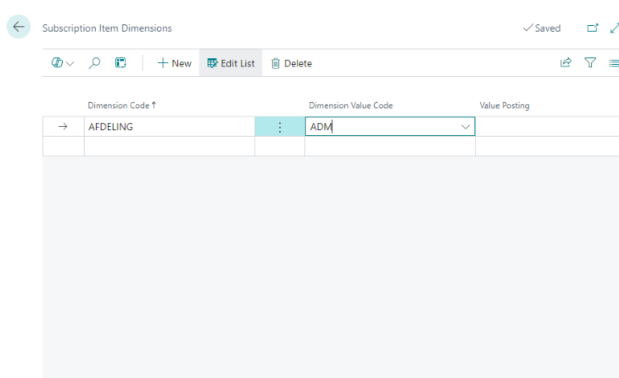
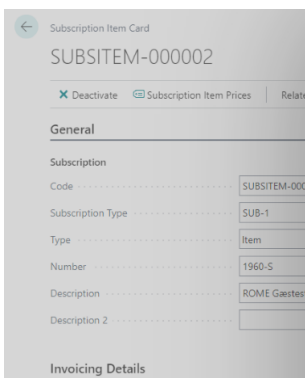


4.4 Subscription Item Dimensions

For every subscription item, you can setup dimensions and transfer them to the subscription lines. It must be both Global and short cut dimensions.

From the **Subscription Item Card** in the actions click on **Related > Subscription Item > Dimensions** to open the **Subscription Item Dimensions** page.

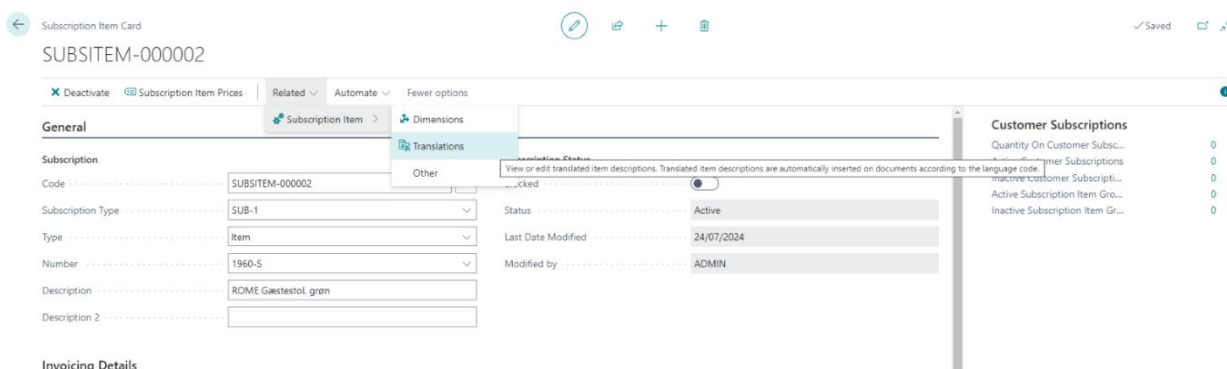


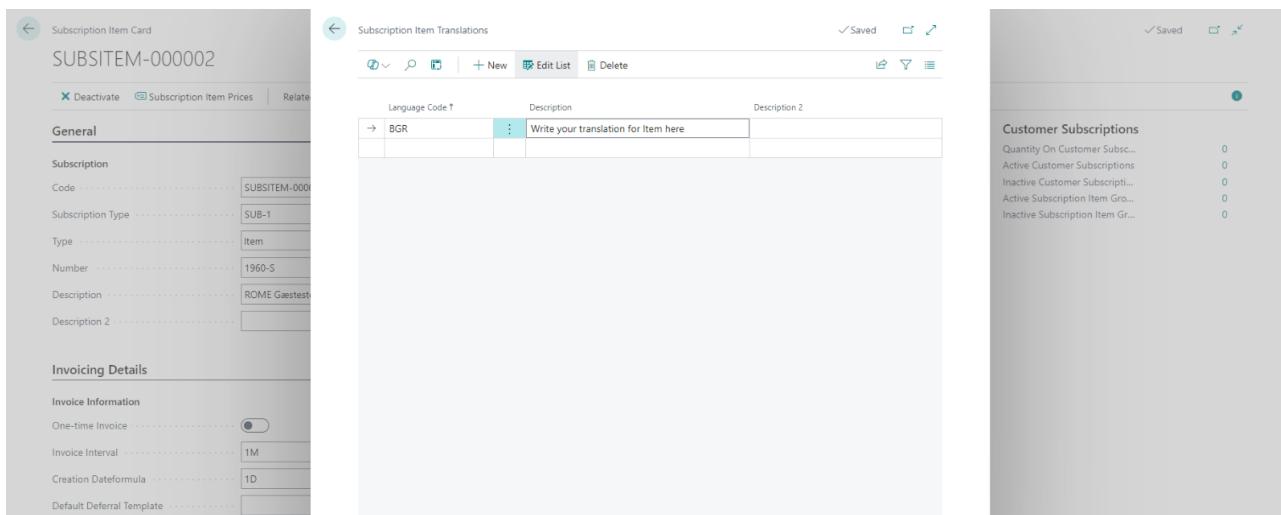


4.5 Subscription Item Translations

For every subscription item, you can set up additional descriptions combined with different language codes.

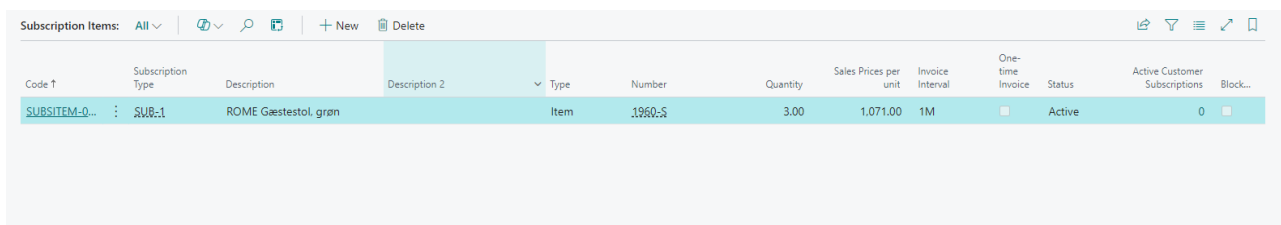
From the **Subscription Item Card** in the actions click on **Related > Subscription Item > Translations** to open the **Subscription Item Dimensions** page.





4.6 Subscription Item List

In the subscription item list, it must be possible to see all the subscription items created. It must be possible to filter the list by subscription type.



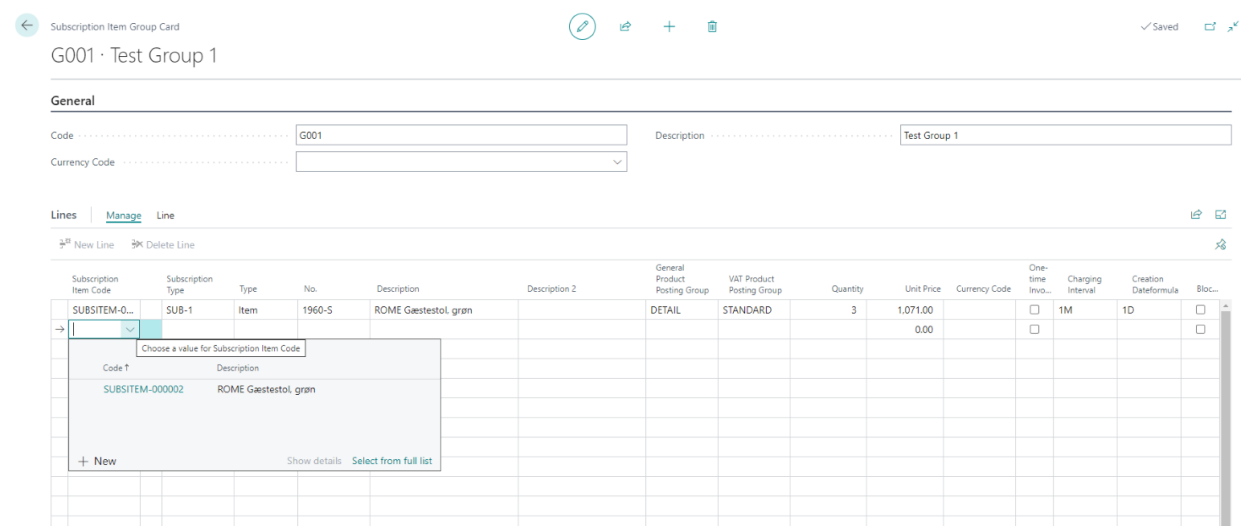
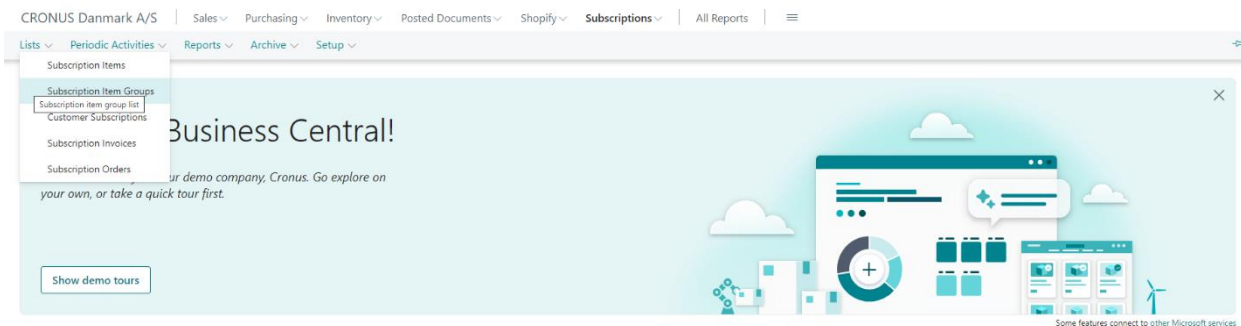
Code ↑	Subscription Type	Description	Description 2	Type	Number	Quantity	Sales Prices per unit	Invoice Interval	One-time Invoice	Status	Active Customer Subscriptions	Block...
SUBSITEM-0...	SUB-1	ROME Gästestol, gran		Item	1960-S	3.00	1.071.00	1M	<input type="checkbox"/>	Active	0	<input type="checkbox"/>

4.7 Subscription Item Group

This feature is only available in **Premium Plan**. You can create a subscription item group if you need the same composition of subscription items for one or more customers. e.g., if different customer subscriptions need to charge the same subscription items or combination of subscription items.

To make a new subscription item group, from the Role Center page click on **Subscriptions -> Lists -> Subscription Item Groups**

On the list page when you click the **New** button another page i.e. **Subscription Item Card** will open.

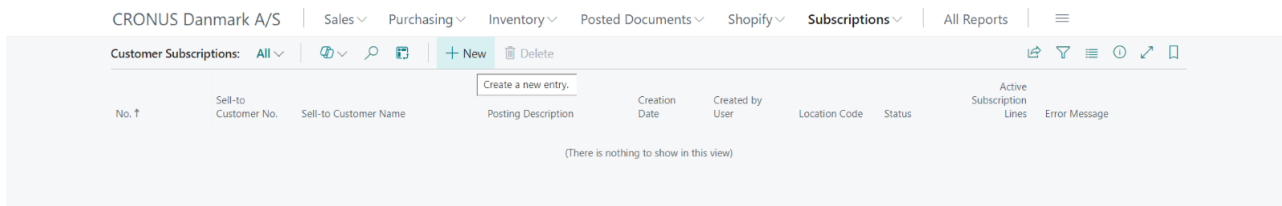
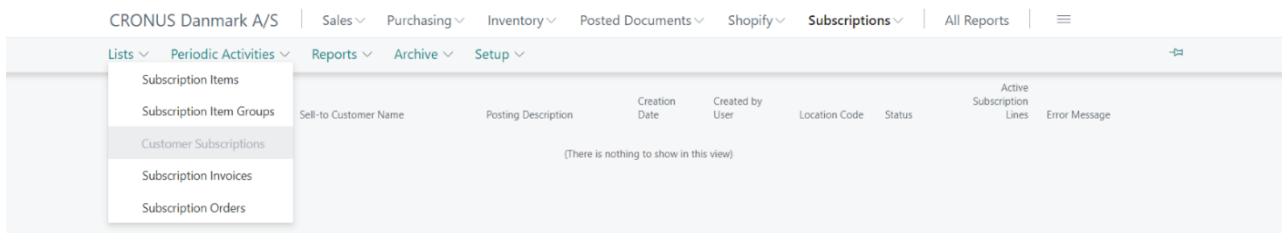


On the subscription item group, you can add lines with subscription items or lines with no connection to subscription items. If you want to type lines with no connection to subscription items, the fields **Subscription Item Code** and **Subscription Type** can be left blank.

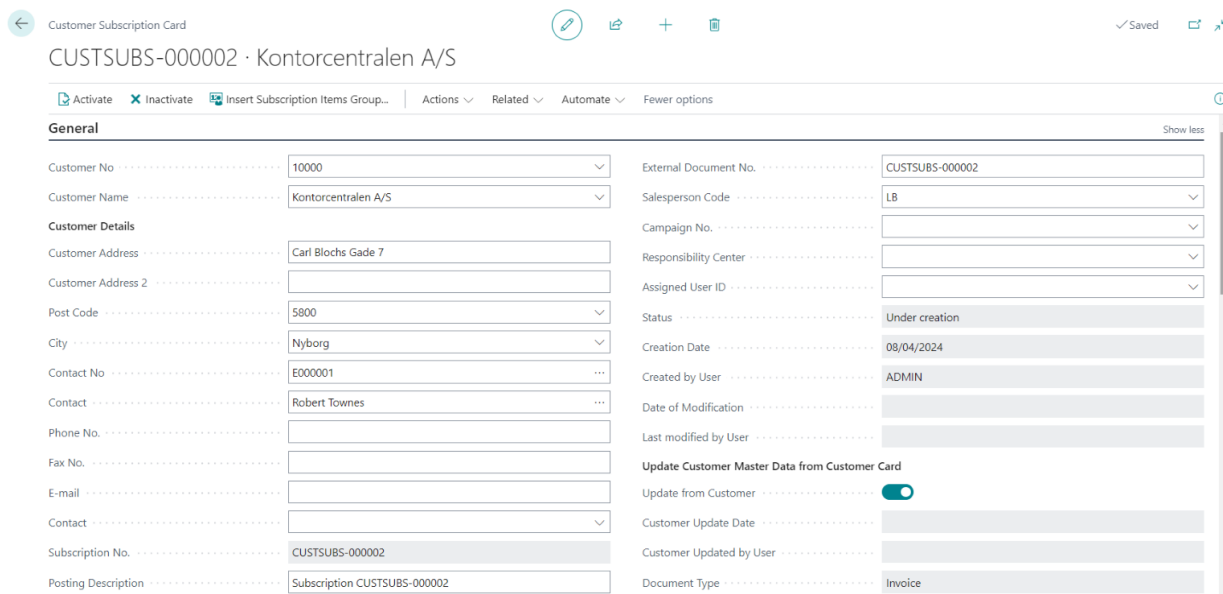
NOTE: If subscription item is not used for lines on customer subscriptions, most fields must be filled in manually

4.8 Customer Subscriptions

Now, you need to create Customer Subscriptions. For this open Customer Subscriptions under submenu of list and click on **"New"**.

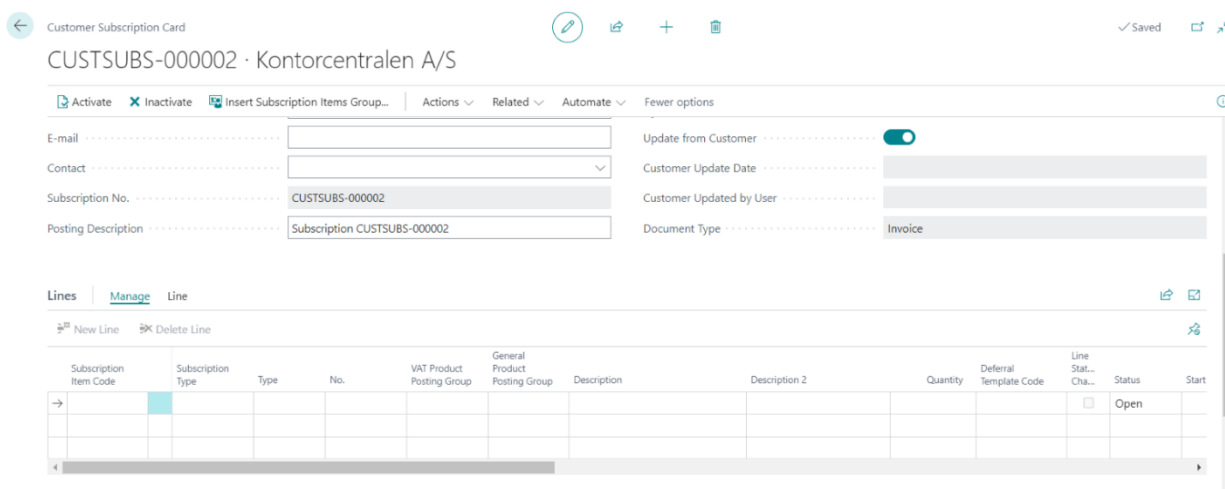


A new Card page will be opened. You need to insert information. When you select **Customer No.** Or **Customer Name**, the fields related to Customer which have data in Master Data of Customer will be populated.



You can see that Document Type is Invoice because we haven't changed anything on Setup page and Invoice is default Document Type. After selecting customers, you need to insert

information regarding subscription items. In below of the Customer information, you can see Lines.



Customer Subscription Card

CUSTSUBS-000002 · Kontorcentralen A/S

Activate
 Inactivate
 Insert Subscription Items Group...
 Actions ▾
 Related ▾
 Automate ▾
 Fewer options ⓘ

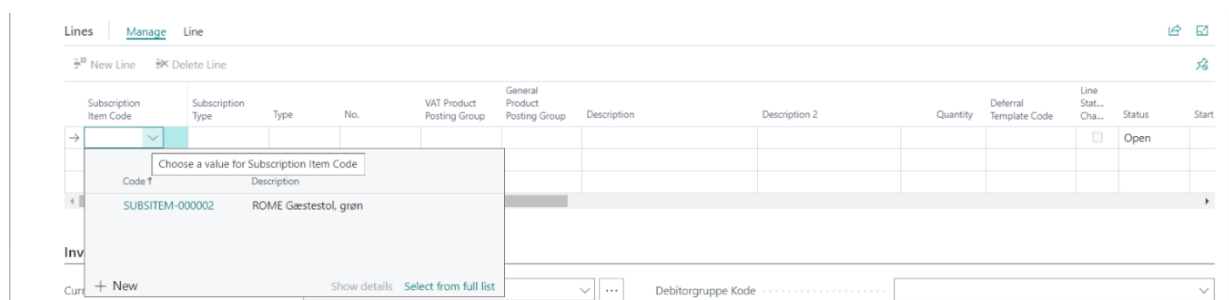
E-mail
 Contact
 Subscription No. CUSTSUBS-000002
 Posting Description Subscription CUSTSUBS-000002

Update from Customer
 Customer Update Date
 Customer Updated by User
 Document Type Invoice

Lines | Manage | Line

Subscription Item Code	Subscription Type	Type	No.	VAT Product Posting Group	General Product Posting Group	Description	Description 2	Quantity	Deferral Template Code	Line Stat... Cha...	Status	Start
→										<input type="checkbox"/>	Open	

When you select the Subscription Item Code, the Items you created in Subscription Items will appear here. You can select anyone from the list.



Lines | Manage | Line

Subscription Item Code	Subscription Type	Type	No.	VAT Product Posting Group	General Product Posting Group	Description	Description 2	Quantity	Deferral Template Code	Line Stat... Cha...	Status	Start
→										<input type="checkbox"/>	Open	

Choose a value for Subscription Item Code
 Code ↑ Description
 SUBSITEM-000002 ROME Gæstestol, grøn

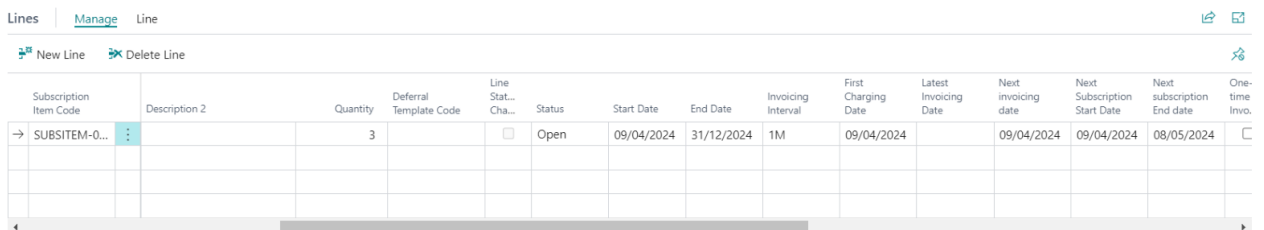
Inv
 Curt + New Show details Select from full list Debitorgruppe Kode

When you select Subscription Item, the data from the Subscription Item will be populated in the line. You can select Subscription Item more than one time. You can also insert the Subscription Item Group that is created by you before. Remember that this is a Premium feature which can be availed during Trial and in Premium Plan. If you are on Basic Plan, you can only insert standard items, G/L account, Resource.

Now, if you scroll right, you need to enter some more information. If you don't select the Invoicing Interval and Creation Date formula, then you must fill in the information here. The invoicing Interval is the period after which the sales document will be generated. Creation Date

formula defines the Starting Date of the subscription from the work date. You also need to enter the End Date. After the end date, no sales document will be created.

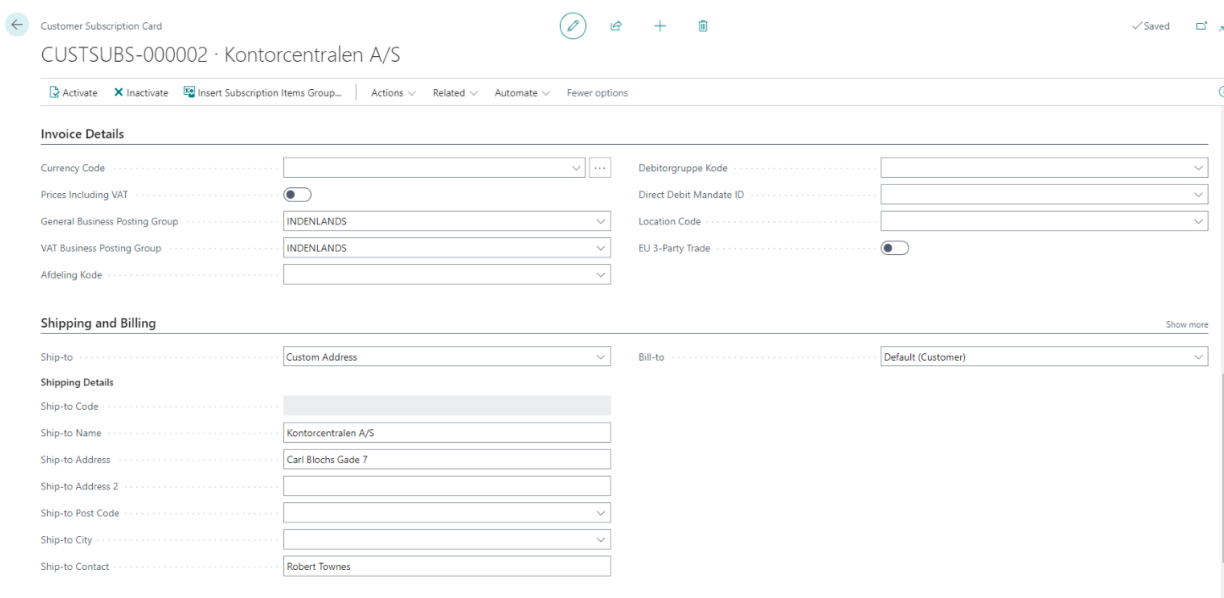
One-Time Invoice means that the sales document will be created only for once. After that, the line will become Inactive.



Subscription Item Code	Description 2	Quantity	Deferral Template Code	Line Stat. Cha...	Status	Start Date	End Date	Invoicing Interval	First Charging Date	Latest Invoicing Date	Next invoicing date	Next Subscription Start Date	Next subscription End date	One-time Invo.
→ SUBSITEM-0...		3		<input type="checkbox"/>	Open	09/04/2024	31/12/2024	1M	09/04/2024		09/04/2024	09/04/2024	08/05/2024	<input type="checkbox"/>

Note: If you don't enter all details, you will get error and it will not allow you to **Activate** the subscription.

You can also change the Currency Code, Shipping, Billing and other details according to your needs.



Customer Subscription Card
CUSTSUBS-000002 · Kontorcentralen A/S

Actions Related Automate Fewer options

Invoice Details

Currency Code: [Dropdown]
 Prices Including VAT:
 General Business Posting Group: INDENLANDS
 VAT Business Posting Group: INDENLANDS
 Afdeling Kode: [Dropdown]

Debitorgruppe Kode: [Dropdown]
 Direct Debit Mandate ID: [Dropdown]
 Location Code: [Dropdown]
 EU 3-Party Trade:

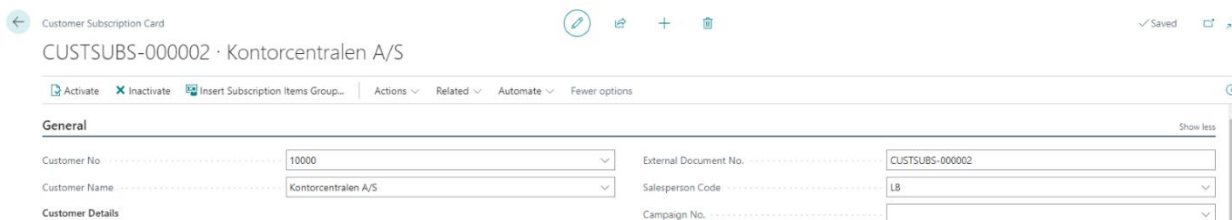
Shipping and Billing

Ship-to: Custom Address
 Bill-to: Default (Customer)

Shipping Details

Ship-to Code: [Dropdown]
 Ship-to Name: Kontorcentralen A/S
 Ship-to Address: Carl Blochs Gade 7
 Ship-to Address 2: [Dropdown]
 Ship-to Post Code: [Dropdown]
 Ship-to City: [Dropdown]
 Ship-to Contact: Robert Townes

To make Sales Document, you need to activate the Subscription. For this purpose, you need to select **Activate** action on the top of page.



Customer Subscription Card

CUSTSUBS-000002 · Kontorcentralen A/S

Activate
 Inactivate
 Insert Subscription Items Group...
 | Actions
 Related
 Automate
 Fewer options

General Show less

Customer No 10000

Customer Name Kontorcentralen A/S

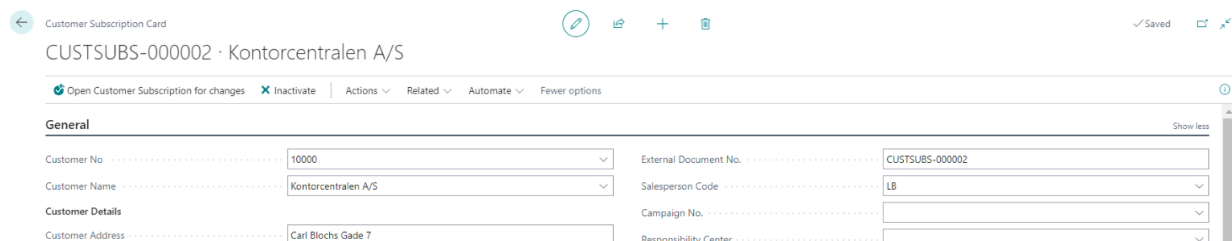
Customer Details

External Document No. CUSTSUBS-000002

Salesperson Code LB

Campaign No.

Customer Subscription will be activated if it has no error, otherwise you will get the error about missing information. You can also Inactivate Subscription. In case you want to make some modification like changing Items, adding items, deactivating lines, you need to select action **Open Customer Subscription for changes**, otherwise you will not be able to make changes.



Customer Subscription Card

CUSTSUBS-000002 · Kontorcentralen A/S

Open Customer Subscription for changes
 Inactivate
 | Actions
 Related
 Automate
 Fewer options

General Show less

Customer No 10000

Customer Name Kontorcentralen A/S

Customer Details

Customer Address Carl Blochs Gade 7

External Document No. CUSTSUBS-000002

Salesperson Code LB

Campaign No.


Responsibility Center


Now you are all set for creating the Subscription Sales Document. In Actions, select **Create Subscription Invoice/Order**. After that, you need to add Posting Date and Document date.

Create Subscription Invoices/Orders




Options

Posting Date 13/07/2024 

Document Date 26/07/2024 

Filter: Customer Subscriptions

× Document Type Order 

× No. CUSTSUBS-000004

× Sell-to Customer No. 

× Bill-to Customer No. 

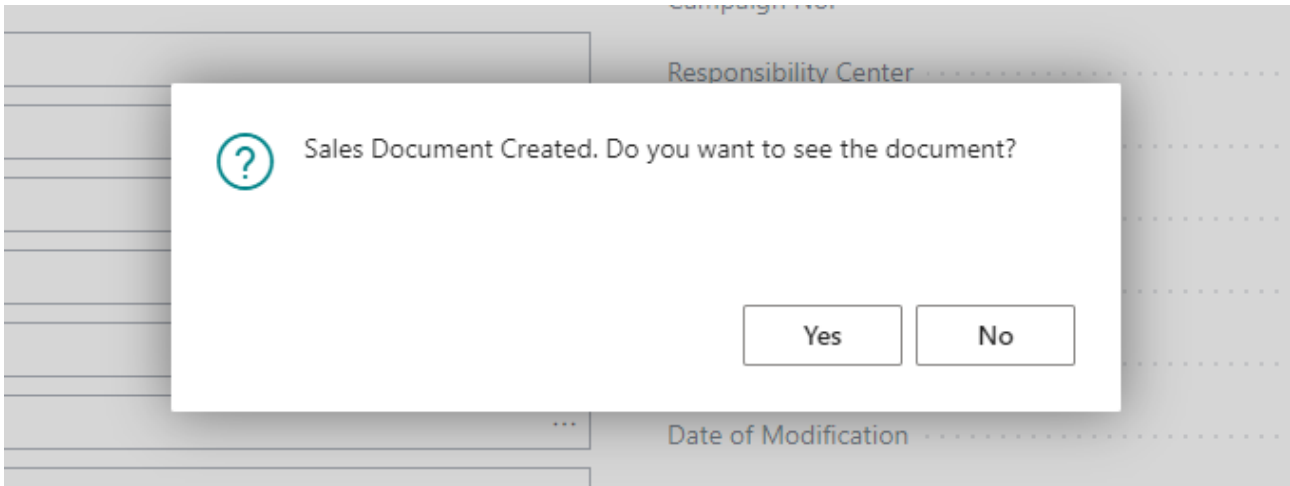
× Posting Date

 Filter...

OK

Cancel

After that, press **OK**. It will ask for Creating Sales Document, if you press **Yes**, it will create sales document and ask if you want to see them.



If you click on **Yes**, the Sales Document list will be opened.

Sales List ↗ ✕

🔍 | 📄 Show Document | More options ↗ ☰

No. ↑ ▼	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Document Date
<u>SUBSINV-0...</u>	10000	Kontorcentralen A/S	CUSTSUBS-...			24/07/2024

If you select the Document, it will open the Sales Document that is created.

Sales Invoice

SUBSINV-000001 · Kontorcentralen A/S

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

Home Prepare Print/Send Request Approval Invoice Actions Related Automate Fewer options

Post Release

General Show less

Customer No.	10000	Contact	Robert Townes
Customer Name	Kontorcentralen A/S	Your Reference	
Sell-to		Document Date	24/07/2024
Address	Carl Blochs Gade 7	Posting Date	24/07/2024
Address 2		VAT Date	24/07/2024
City	Nyborg	Due Date	24/08/2024
Post Code	5800	External Document No.	CUSTSUBS-000002
Country/Region Code	DK	Salesperson Code	LB
Contact No.	E000001	Campaign No.	
Contact Phone No.		Responsibility Center	
Contact Fax No.		Assigned User ID	
Contact E-Mail	robert.townes@contoso.com	Status	Open
Contact Role		Work Description	
Phone No.			
Mobile Phone No.			

Details Attachments (0)

Customer Statistics

Customer No.	10000
Balance (LCY)	0.00
Balance (LCY) As Vendor	0.00
Sales	
Outstanding Orders (LCY)	178,063.75
Shipped Net Invd. (LCY)	0.00
Outstanding Invoices (LCY)	129,701.25
Payments	
Payments (LCY)	1,522,983.15
Refunds (LCY)	0.00
Last Payment Receipt Date	21/03/2024
Total (LCY)	307,765.00
Credit Limit (LCY)	0.00
Overdue Amounts (LCY)	0.00
Total Sales (LCY)	337,078.00
Invoiced Prepayment Amo...	0.00

Note: If you don't post the Sales Document and try to create the Sales Document from Same Subscription, it will show you that it is Skipping that one because unposted Sales Document is already present.

You can also create multiple subscription invoices and orders simultaneously. You can do this by expanding sub-menu of Subscriptions, then choose **Periodic Activities >> Create Subscription Invoices/Orders**.

CRONUS Danmark A/S | Sales Purchasing Inventory Posted Documents Shopify Subscriptions All Reports

Lists Periodic Activities Reports Archive Setup

Headline

War about Business Central

Show Upcoming Subscription Invoices/Orders

Update Customer Master Data

Create Subscription Invoices/Orders

To create subscription invoice/order

Actions


- + Sales Quote
- + Sales Invoice
- + Sales Order
- + Sales Return Order
- + Sales Credit Memo
- > Tasks
- > Sales
- > Reports
- > History

You will see the request page where you must add Posting Date and Document Date. You can also add filters like **Customer No., Document Type** etc. If you don't add any filters, it will create all the subscription invoices and orders that are pending. If there are any unposted sales invoices and orders, it will be skipped, and you will get a message regarding skipping the report.

Create Subscription Invoices/Orders



Options

Posting Date 25/07/2024 

Document Date 25/07/2024 

Filter: Customer Subscriptions

× Sell-to Customer No. 

× Bill-to Customer No. 

× Posting Date

[+ Filter...](#)

Filter totals by:

[+ Filter](#)

Press **OK** to begin the creation of subscription invoices and orders.



Document for Customer Subscription # CUSTSUBS-000004
skipped because an unposted document already exist

OK

Note: CUSTSUBS-000004 was already present in the Sales Invoice as an unposted invoice, hence it is skipped.

After creation of all the subscription sales invoices and orders, you will see the following message. You can see the created invoices and orders on the Sales Invoices and Sales Orders page.



Sales Document Created Successfully.

OK

4.9 Update Customer Master Data

In the Premium version, there is a feature that updates all the Customer Data if there is any change in Customer Master Data. Assume the address of Customer change and you have multiple Subscriptions against that customer. Then, you can synchronize the Master data of customer and data present in Subscription Management. For this purpose, you need to select **Update Customer Master Data** action from Actions.

Customer Subscription Card

CUSTSUBS-000002 · Kontorcentralen A/S

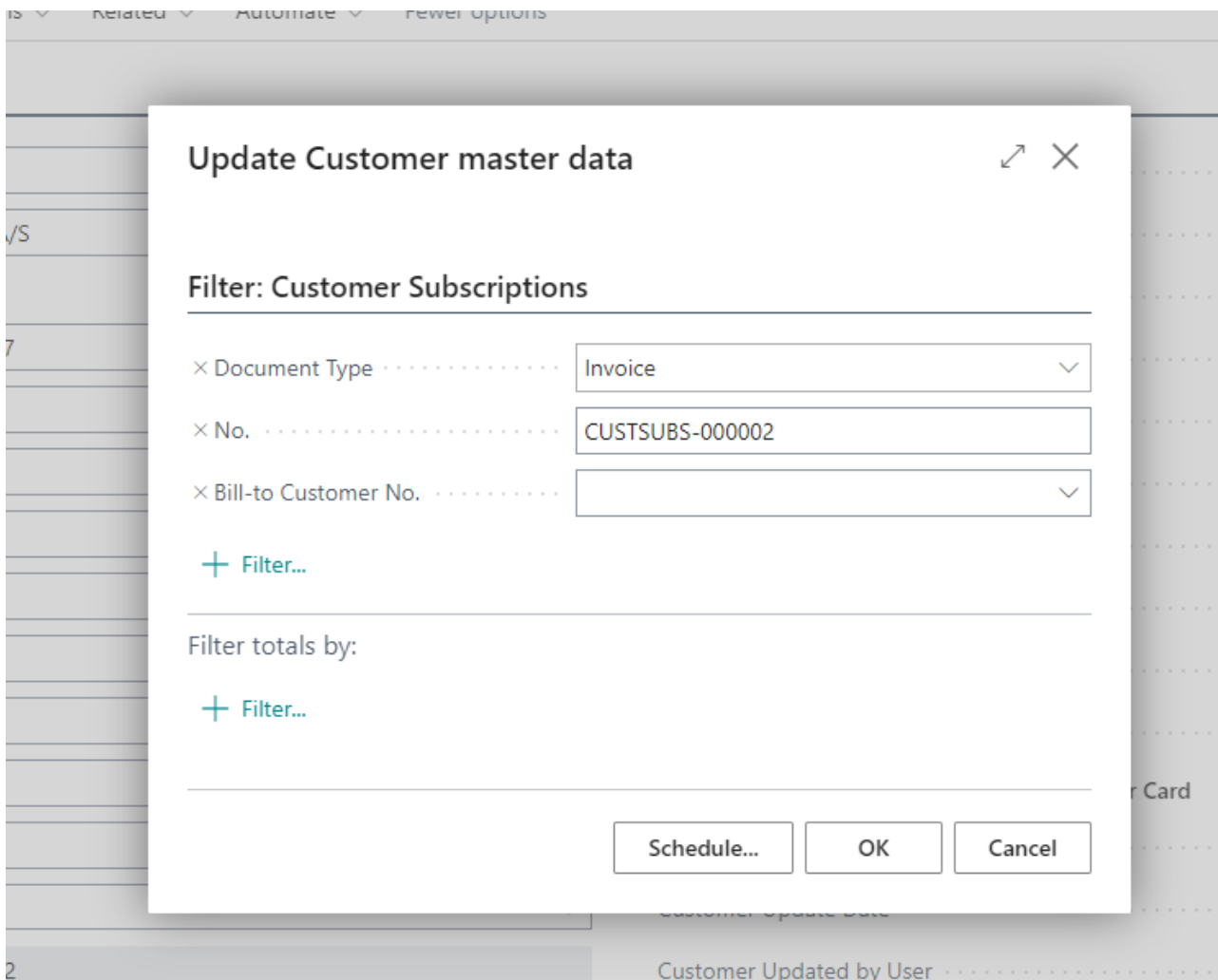
Open Customer Subscription for changes Inactivate Actions Related Automate Fewer options

General Show less

Customer No	10000	External Document No.	CUSTSUBS-000002
Customer Name	Kontorcentralen A/S	Salesperson Code	LB
Customer Details		Campaign No.	
Customer Address	Carl Blochs Gade 7	Responsibility Center	
Customer Address 2		Assigned User ID	
Post Code	5800	Status	Active
City	Nyborg	Creation Date	08/04/2024
Contact No	E000001	Created by User	ADMIN
Contact	Robert Townes	Date of Modification	08/04/2024
Phone No.		Last modified by User	ADMIN
Fax No.		Update Customer Master Data from Customer Card	
E-mail		Update from Customer	<input checked="" type="checkbox"/>
Contact		Customer Update Date	
Subscription No.	CUSTSUBS-000002	Customer Updated by User	
Posting Description	Subscription CUSTSUBS-000002	Document Type	Invoice

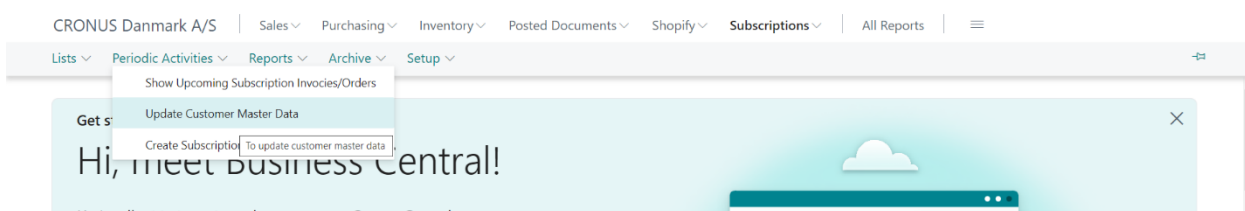
Lines [Manage](#) Line

Data before using Customer Master Data action. (Here, we have assumed that the address of Customer 10000 has been changed.)



You can choose the action from the Card page and from the sub-menu of Subscription Management. You need to set filters and press **OK**. It will check and updates the data of Customer. It might show you some messages regarding the important validations that are changed.

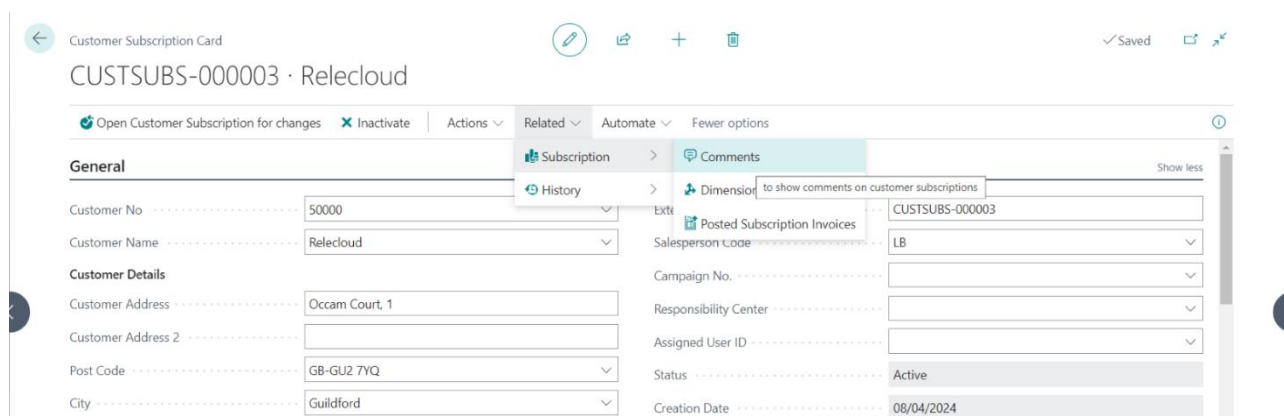
You can also Update Customer Data for all the customers. Expand the Subscription sub-menu, choose **Periodic Activities**, then choose **Update Customer Master Data**.



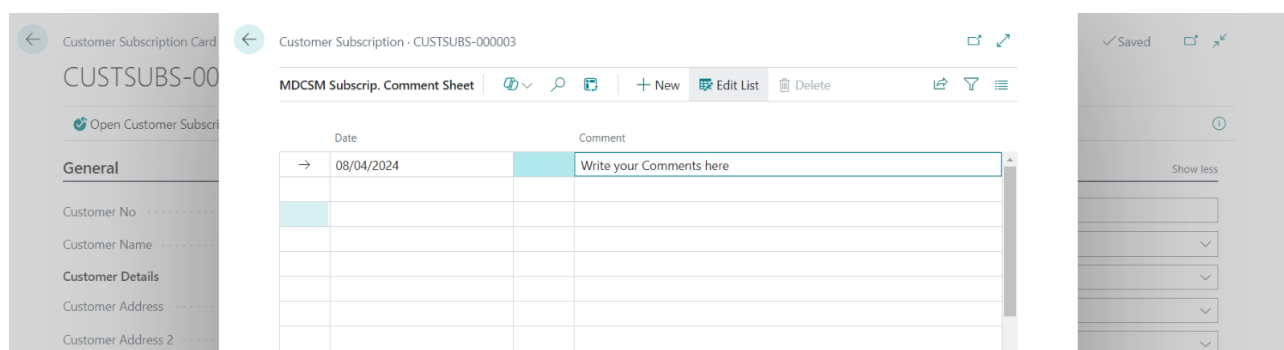
If you don't choose any filter, it will check for all the customers in subscription and updates data of those customers that are changed in Master data of customers.

4.10 Comments

You can add comments on the Subscription Header. If you have selected to Transfer Comments in Setup, then the comments will be also transferred to Sales Document.

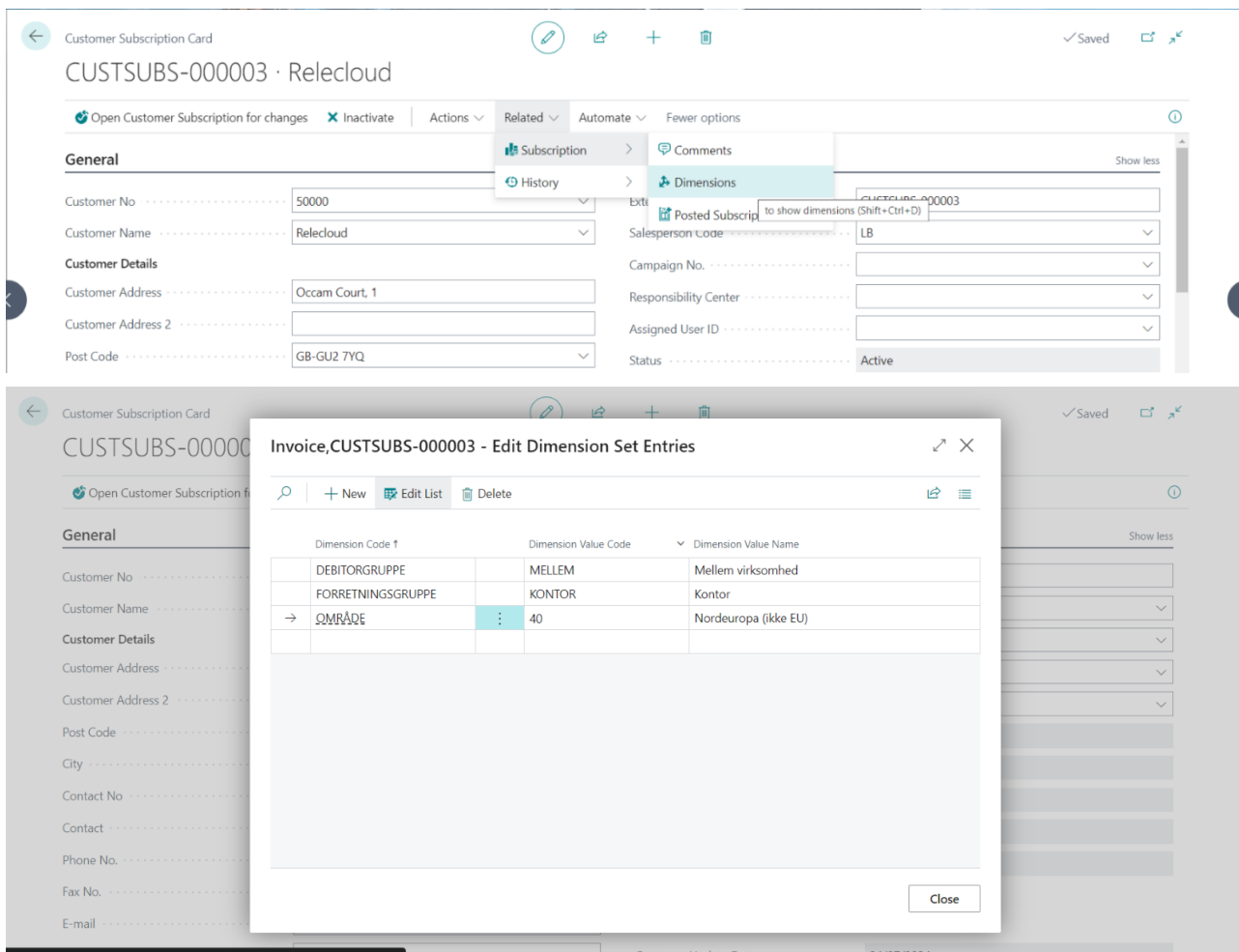


The following is an example:



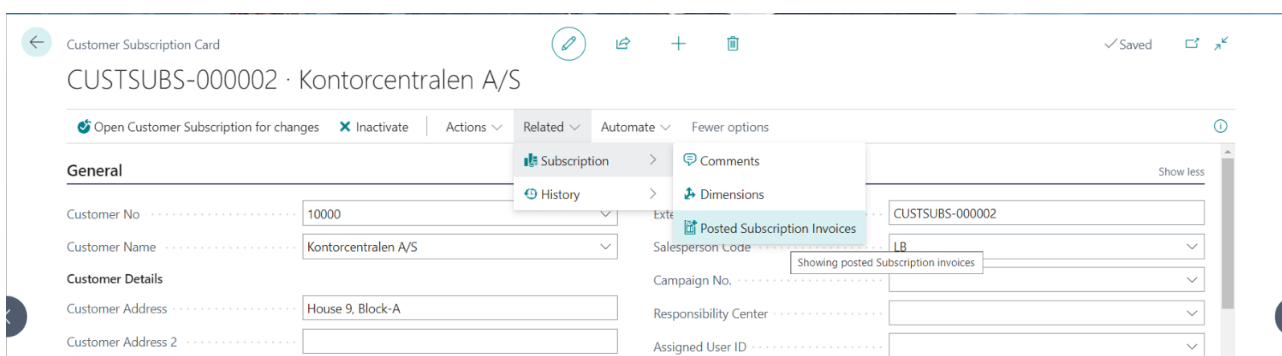
4.11 Dimensions

Similarly, you can modify the Dimensions. By default, it has the dimensions of that customer which you have chosen.



4.12 Posted Subscription Invoices

You can also see all the posted invoices that are posted through Subscription.



The following is an example of the Posted Invoice.

Posted Sales Invoices

Posted Sales Invoices: All | Manage | Home | Print/Send | Invoice | Correct | More options

Update Document | Find entries... | Create Electronic Invoice

No.	Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount Including VAT	Ren #
PSUBSINV-...	10000	Kontorcentralen A/S		24/08/2024	3,213.00	4,016.25	4

Details | Attachments (0)

Incoming Document Files

Name	Type
(There is nothing to show in this view)	

Related G/L Entries

G/L Account No. ↑	G/L Account Name	Amount (LCY)
-------------------	------------------	--------------

4.13 Subscription Chargings

You can view all the Subscriptions that has been charged till now against that subscription. On the header, choose related > History > Subscription Charging.

Customer Subscription Card

CUSTSUBS-000002 · Kontorcentralen A/S

Open Customer Subscription for changes | Inactivate | Actions | Related | Automate | Fewer options

Subscription | History | Subscription Charging

General		Subscription	
Customer No.	10000	External Document No.	CUSTSUBS-000002
Customer Name	Kontorcentralen A/S	Salesperson Code	LB
Customer Details		Campaign No.	
Customer Address	House 9, Block-A	Responsibility Center	
Customer Address 2		Assigned User ID	
Post Code	5800	Status	Active
City	Nyborg	Creation Date	08/04/2024

You can also view all the subscription invoices and orders. For this purpose, expand the sub-menu of subscription management, choose **Archive** > **Subscription Chargings**.

CRONUS Danmark A/S | Sales | Purchasing | Inventory | Posted Documents | Shopify | Subscriptions | All Reports

Lists | Periodic Activities | Reports | Archive | Setup

Subscription Invoices

Entry No	Document Type	Document No.	No.	External Document No.	Creation Date	Created by User
1	Invoice	SUBSINV-000001	CUSTSUBS-000002	CUSTSUBS-000002	24/07/2024 16:01	ADMIN
2	Order	SUBSORD-000001	CUSTSUBS-000004	CUSTSUBS-000004	25/07/2024 10:49	ADMIN

4.14 Subscription Invoices and Subscription Orders

You can also view all the Subscription Invoices and Subscription Orders that are created but not posted yet. For this purpose, **Subscriptions > Lists > Subscription Orders** (You can view Invoices by choosing Subscription Invoices)

Dynamics 365 Business Central | CRONUS Danmark A/S | Sales | Purchasing | Inventory | Posted Documents | Shopify | Subscriptions | All Reports

Lists | Periodic Activities | Reports | Archive | Setup

Subscription Orders

External Document No.	Location Code	Assigned User ID	Document Date	Status	Compl... Shipped	Amount Shipped Not Invoiced (LCY)	Amount Shipped Not Invoiced (LCY) Incl. VAT
Kontorcentralen A/S	CUSTSUBS-...		18/07/2024	Open	No	0.00	0.00

The following is the Subscription Order that has been created but not posted yet.

CRONUS Danmark A/S | Sales | Purchasing | Inventory | Posted Documents | Shopify | Subscriptions | All Reports

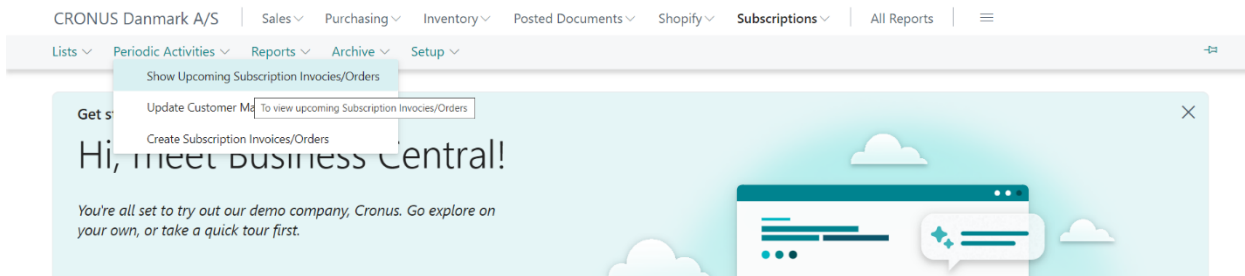
Subscription Orders: All | Home | Release | Post... | Print/Send | Order | More options

No.	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Document Date	Status	Compl... Shipped	Amount Shipped Not Invoiced (LCY)	Amount Shipped Not Invoiced (LCY) Incl. VAT
SUBSORD-00...	10000	Kontorcentralen A/S	CUSTSUBS-...			18/07/2024	Open	No	0.00	0.00

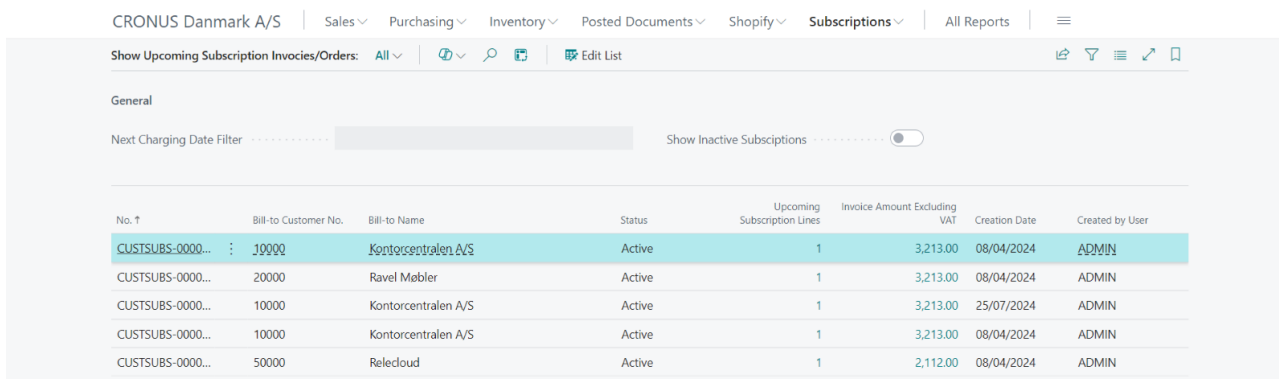
Note: Subscription Order is a feature of Premium version. However, you can view Subscription Invoices in Basic version.

4.15 Show Upcoming Subscription Invoices/Orders

You can also view all the upcoming Subscription Invoices and Orders. It shows a list of all the Subscriptions that are Active, and their Invoices/Orders are to be created in upcoming dates.



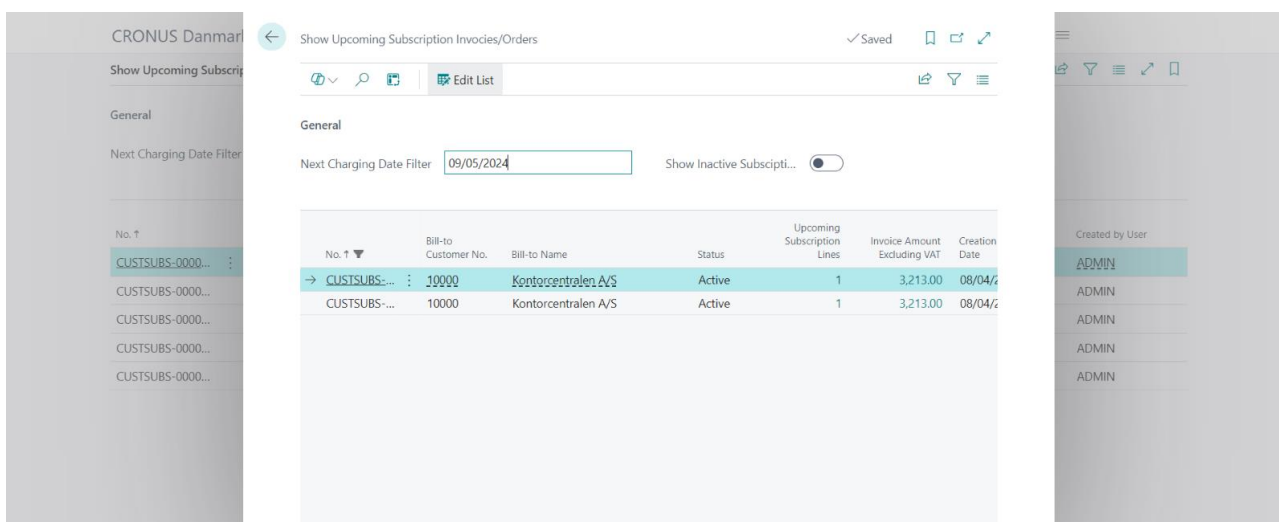
You will see the list of all the upcoming subscriptions.



The screenshot shows the 'Show Upcoming Subscription Invoices/Orders' list. The 'Next Charging Date Filter' is set to a date range. The 'Show Inactive Subscriptions' toggle is turned off. The table below lists the subscriptions with columns for No. ↑, Bill-to Customer No., Bill-to Name, Status, Upcoming Subscription Lines, Invoice Amount Excluding VAT, Creation Date, and Created by User.

No. ↑	Bill-to Customer No.	Bill-to Name	Status	Upcoming Subscription Lines	Invoice Amount Excluding VAT	Creation Date	Created by User
CUSTSUBS-0000...	10000	Kontorcentralen A/S	Active	1	3,213.00	08/04/2024	ADMIN
CUSTSUBS-0000...	20000	Ravel Møbler	Active	1	3,213.00	08/04/2024	ADMIN
CUSTSUBS-0000...	10000	Kontorcentralen A/S	Active	1	3,213.00	25/07/2024	ADMIN
CUSTSUBS-0000...	10000	Kontorcentralen A/S	Active	1	3,213.00	08/04/2024	ADMIN
CUSTSUBS-0000...	50000	Relecloud	Active	1	2,112.00	08/04/2024	ADMIN

Here, you can also apply a filter for Next Charging Date. You will only see subscriptions which have the same Next Charging Dates with filter date.



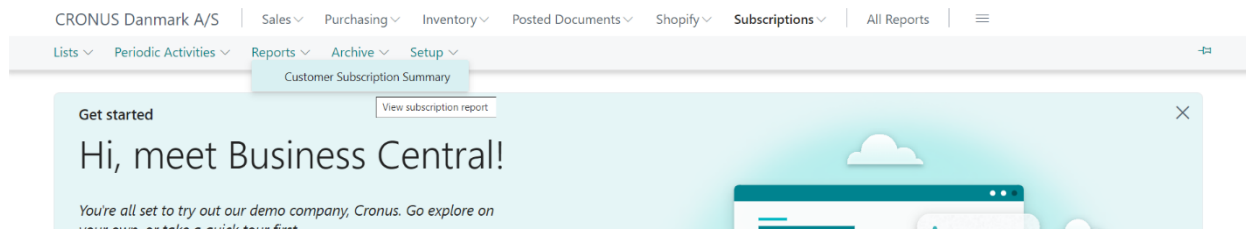
The screenshot shows the 'Show Upcoming Subscription Invoices/Orders' list with a filter applied to the 'Next Charging Date'. The 'Next Charging Date Filter' is set to '09/05/2024'. The 'Show Inactive Subscriptions' toggle is turned off. The table below shows only the subscriptions that match the filter date.

No. ↑	Bill-to Customer No.	Bill-to Name	Status	Upcoming Subscription Lines	Invoice Amount Excluding VAT	Creation Date	Created by User
→ CUSTSUBS-...	10000	Kontorcentralen A/S	Active	1	3,213.00	08/04/2024	ADMIN
CUSTSUBS-...	10000	Kontorcentralen A/S	Active	1	3,213.00	08/04/2024	ADMIN

You can also view Inactive Subscription Invoices and Orders by Activating the button **Show Inactive Subscriptions**.

4.16 Customer Subscription Summary

In the Premium version, you can also see the Subscription Summary.



You can choose filters according to your business needs, then you will get a summary report of your current Subscriptions. You can set filters for Inactive Customers, View Details etc.

Customer Subscription Summary



Printer (Handled by the browser) ▾

Report Layout\src\Reports\Layouts\CustomerSubscrip... ⋮

Options

Show only Active Customer Sub...

Show only Inactive Customer Su...

Include Zero Price Customer Su...

Show Customer Subscriptions T...

Show Totals

Show details

Show Customer Subscription Li... ▾
Next Charging Date is before End Date ▾

Send to... Print Preview & Close Cancel

After setting filters, you can send, print and preview the report. The following is the result of a report that has been created according to filters.

Customer Subscriptions Summary

CRONUS Danmark A/S

25/07/2024 11:40
Page 1
ADMIN

Status: Active

Shows only Next Charging Date before End Date

Subscription Type	Sell-to Customer Name	Sell-to Customer No.	Start Date	No.	Description	Interval	Latest Invoicing Date	Next invoicing date	End Date	Line Amount Excl. VAT	Quantity
CUSTSUBS- SUB-1 000002	Kontorcentralen A/S	10000	09/04/2024	1960-S	ROME Gæstestol, grøn	1M	09/04/2024	09/05/2024	31/12/2024	3.213,00	3
CUSTSUBS- 000003	Relecloud	50000	01/07/2024	1908-S	LONDON-drejestol, blå	1W		01/07/2024	31/07/2024	2.112,00	2
CUSTSUBS- SUB-1 000004	Kontorcentralen A/S	10000	09/04/2024	1960-S	ROME Gæstestol, grøn	1M	09/04/2024	09/05/2024	31/10/2024	3.213,00	3
CUSTSUBS- SUB-1 000005	Ravel Møbler	20000	01/03/2024	1960-S	ROME Gæstestol, grøn	1M		01/03/2024	30/04/2025	3.213,00	3
CUSTSUBS- SUB-1 000006	Kontorcentralen A/S	10000	26/07/2024	1960-S	ROME Gæstestol, grøn	1M		26/07/2024	30/10/2024	3.213,00	3
Total										14,964,00	14
Total Number of Subscription Lines											5

