User manual

SUBSCRIPTION CONTRACT
DOLIBARR

MAXIME MANGIN

Statut du document			
Date	Version	Commentaire	Auteur
07/2012	1.0	Création	Maxime
02/2013	1.1	Actualization and translation in english	Maxime
02/2013	1.2	Update with new functionality of 3.3 version	Maxime
01/2014	1.3	Add mass sending email	Maxime

Summary

Introduction

This document is a user manual for the « subscription contract » module developed for Dolibarr by Maxime MANGIN <maxime@tuxserv.fr>.

This module is currently available in my store at the following address :

http://boutique.tuxserv.fr/

The main goal of this module is to create and manage subscriptions in Dolibarr by completing existing contracts.

This document describes the main features of this module and detail usage allowing better comprehension. Additional modules have been developped to meet more specifics needs. They also will be presented here.

Note for updates: Updates for this module generally include compatibility with the new version of Dolibarr and any corrections / features that seemed relevant to me (most of them proposed by module's users).

This document presents:
1. The module« Subscription contract» **(part 1)**
2. Additional modules **(part 2)**
   a. Tacit agreement
   b. Mass invoicing
   c. Non-civils periods
3. Contact **(part 3)**

Part 1 : Subscription contracts

The module "Subscription contract" allows to manage subscription of products and services in Dolibarr.

This module create subscription periods according predefined schedules, in complementing the basic interface of actual « contracts". It automatically calculates dates and amounts of these periods.

A Dolibarr box is located in the home page to alert different deadlines.

Installation and configuration

Installation processing with a copy-pasting files. There are two possibilities :

- Copy-Pasting files in htdocs directory (You have to find « contratabonnement » in "htdocs")
- Using the custom directory of Dolibarr (version 3.3 and higher). In this case do not forget to add the 2 parameters in your configuration file.

Once the files are copied, the module can be activated in Dolibarr modules.

After activation, you have to configure the module with the corresponding button (here the computer).

This interface can change according to the different additional module installed.

In the basic version, the module propose to change the deadlines of alerts in the home box.

If you write « 15 » for "Number of days before" that means you want to be alerted 15 days before the deadline of the subscriptions. Vice versa for "Number of day after".

Do not forget to activate the box in the home of Dolibarr to be alerted.

Manage a subscription

The creation of a subscription begins in the "contract" card on which a new tab has been created.

If it is not already done, add a product or a service in the contract section (dolibarr basic contract) with a beginning and ending date (unless you use "tacit agreement" module, see part 2).

Then so to « subscription » tab to find your article in the first drop-down list named « --Products/Services found --».

Select the desired value in column "Price as". This list defines if the price written in product or service must be considered as the price for one month, or one year…
(Dolibarr's users are free to choose they own billing method, this list is required to keep a consistent billing)

Field « Repeat» will allow you to choose from :
- All months
- All trimesters
- All semesters
- All years

To finish, select the date of the invoice (beginning or end of the period).

After clicking on the button « add », the module automatically create corresponding periods

By default, the module calculates his periods with civil calendar to allow you to generate all invoices at the same date. This behavior can be modified with the additional module "non-civils periods" in part two.
One period always begins on the first day of the month and ending at the end of the month except for the first and last periods that use real dates (the amount is calculated proportionally to the number of days in the period).

Clicking "edit" will allow you to display the different periods and edit amounts and statuses.
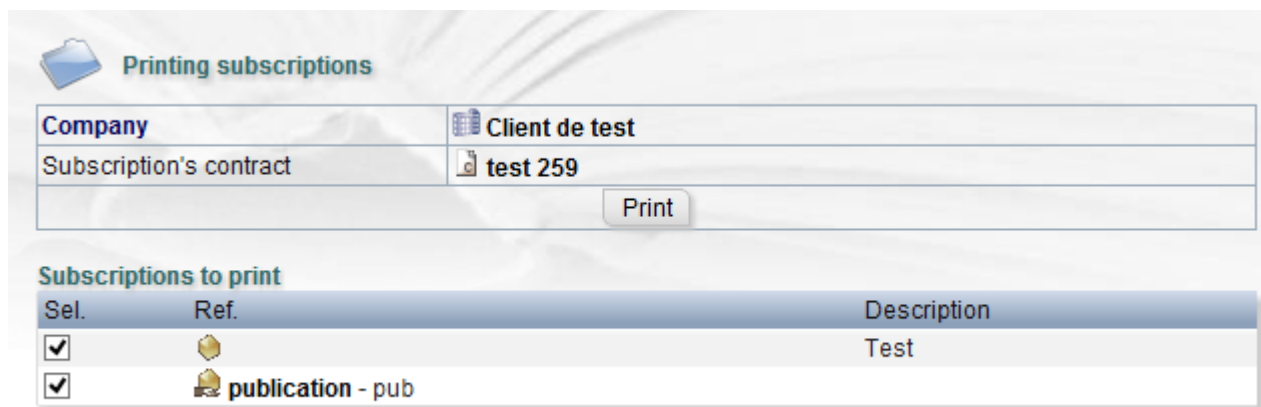

The checkbox « billing» you can see here specify if the period is already billing or not. This option can be modified manually but it is automatically checked during the creation of the corresponding invoice.

In the 3.3 version, the module also displays prices with discounts, if any.

Print a subscription

The button « print periods » located at the bottom allows you to export the current status of the subscription(s).

Print periods

Printing subscriptions

Company	Client de test
Subscription's contract	test 259

Print

Subscriptions to print

Sel.	Ref.	Description
☑		Test
☑	publication - pub	

The dates, amounts, kinds of subscriptions (beginning or beginning of the month) and statuses (invoiced or not) are displayed.

Depending of the module version, the export could be in .PDF (< 3.1 version) or .ODT (> 3.2).

If the export is in ODF format, you can modify the template here: « contratabonnement/tpl/contratabonnement.odt »

For more information :

http://wiki.dolibarr.org/index.php/Create_an_ODT_document_template

Monitoring a subscription

Although the monitoring could be done manually for each contract, the module displays periods that have to be invoiced in a box situated in the Dolibarr home.

Subscription contract to invoice					
test 259	Client de test	02/19/2013	0 HT	3☐ 0☐ 0☑ 0☒ ⚠
test 259	Client de test	02/24/2013	123.33 HT	3☐ 0☐ 0☑ 0☒
test 259	Client de test	03/01/2013	0 HT	3☐ 0☐ 0☑ 0☒
CT1207-0001	Client de test	04/01/2013	266.66 HT	1☐ 0☐ 1☑ 0☒

This box contains the following information :
- Contract number
- Company
- Date of invoice (Taking into account the kind of term)
- Amount
- Status (Dolibarr core)

- Number of lates days (mouse over the triangle)

You can refer to the configuration part to change the deadlines of alerts.

You will be redirected to the subscription if you click on the contract number.

It is possible to invoice all (or part) of the subscription with only one click with the "mass invoicing" additional module (referring part 2).

Invoice a subscription

The billing of subscription is realized with the button « Create subscription bill » at the bottom of the page.

The application will then ask you to select periods you want to choose to create the draft of the invoice.

By default, the module selects the current period or the next period in the case of accruing subscription. You are free to accept or reject this choice.

The checkbox « show as billing » considers that periods are billing (or not). It is similar to manually select the following red case:

The subscription and invoice are linked after the creation.

Part 2 : Additional modules

This additional modules can be added to the « contract subscription » to meet specific needs.
They are also available in my shop.
Note: They cannot be functional without "subscription contract" module.

It is important to mention that all modules are compatible with each other (we can use mass invoicing and tacit agreement for instance).

Tacit agreement

This additional module allow to automatically renew subscriptions.

It is based on 2 principles :
- X periods are created during the creation of the subscription
- The number of invoiced periods are automatically renewed during the creation of the invoice

To apply the tacit agreement, just specify the number of initial periods that module should create in the module configuration:

Number of period for reconduction	5	Modify

and do not specify an ending date for the corresponding product / service in contract card.

For example if you invoice 3 periods of a subscription contract, 3 new periods will be automatically created after invoicing.

At any time you have the possibility the stop the tacit agreement by deselect the corresponding checkbox during the creation of the invoice.

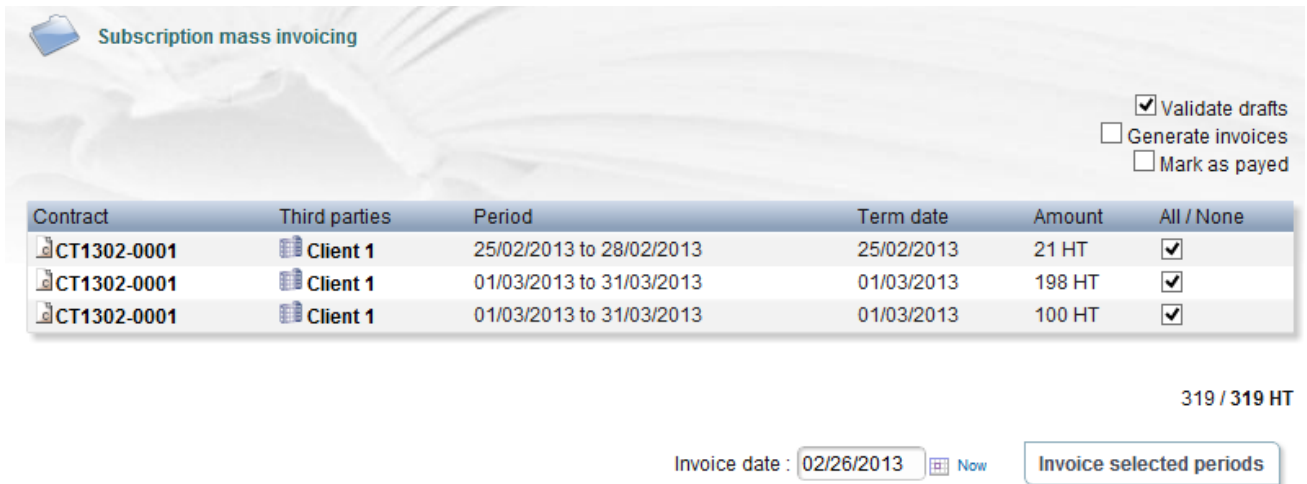| Note (private)	
Subscription's contract	test 259
Show as billing	✔
Renew periods	✔

Create draft

Mass invoicing

Some Dolibarr users manage a large quantity of invoices. In this case, the manual creation can quickly become tedious.

With this in mind, this additional module fits on the box available on the home page.

The interface allow you to select periods you want to invoice in all the companies and all the subscriptions.

The module in 3.2 version allows you to :
- Select all periods with only one click (all / none)
- Specify the date of invoice (Current date by default)
- Automatic validation of invoices

Version 3.3 add following features :
- The display total amount and selected amount
- The option "Generate invoices"
- The option "Mark as paid"

Once the invoices are created, the list of the created invoices is added to the agenda (if activated).

Event	**Event card**	**Linked files**	**Log**

Ref.	65		
Type	Other		
Title	Invoice grouped subscriptions		
Event on full day	No		
Start date	02/24/2013 07:03 PM		Month view
End date	02/24/2013 07:03 PM		Week view
Status / Percentage	☒ Complete (100%)		Day view
Location			

Event reported by	☃ **SuperAdmin**
Event affected to	
Event done by	

Task about company	None	Contact		None
Project				
Priority				
Description	List of created invoices : • FA1302-0010 • FA1302-0011			

Modify   Delete

Note :

- The periods are selected as invoiced and disappear of the mass invoice list.

- The tacit agreement is applied if you have this module.

Mass invoicing and sending

This additional module is based on the mass invoicing module.

It add an option to send generated invoices by email.

The send (or not) can be activated with the following checkbox :

send by email

To be more flexible, the module propose a general and a specific template for each third parties (if needed).

The object and the content of the mail are customizable.

The general template can be edited in the configuration of the module :

Subscription mass invoicing	Value	
Object	General object	Modify
Message	General Message	Modify

Use -COMPANY- et -PERIOD- to add the company name and corresponding period

An additional tab is added in the third party card to specify a mail for this company.

Third party	Card	Customer	Agenda	Margins	Subscriptions	Note	Consumption	Linked files	Log

Third party name	Client 1	
Customer code		

Subscription mass invoicing	Value	
Object	Object	
Message	Message for customer 1	Modify

Use -COMPANY- et -PERIOD- to add the company name and corresponding period

Note : You can use 2 variables to personalize the content of the mail : third party name and current period

Non-civils periods

As previously mentioned, the module « subscription contract» use civil calendar to create the periods.

This choice allows you to manage the most of the invoices in a common date (beginning or ending date).

If this behavior is not a good choice for your activity, you can add this module to use the real dates.

After copy-pasting, the module can be disabled or enabled in « subscription contract » configuration :

Once this option is "yes", periods will be stricly based on dates of products / services.

Example with option « yes » :

Example with option « No » :

Abonnement N°1	Service	Période	Somme	Facturé	Facturer	
	test - test	16/07/2012 au 16/08/2012	50	☐	En début de période	Modifier
		16/08/2012 au 16/09/2012	50	☐		Annuler
		16/09/2012 au 16/10/2012	50	☐		
		16/10/2012 au 16/11/2012	50	☐		
		16/11/2012 au 16/12/2012	50	☐		
		16/12/2012 au 16/01/2013	50	☐		
		16/01/2013 au 16/02/2013	50	☐		
		16/02/2013 au 16/03/2013	50	☐		
		16/03/2013 au 16/04/2013	50	☐		
		16/04/2013 au 16/05/2013	50	☐		
		16/05/2013 au 16/06/2013	50	☐		
		16/06/2013 au 15/07/2013	50	☐		

Part 3 : Contact

Would you need any specific development, please do not hesitate to contact me and send me you specifications at maxime@tuxserv.fr.

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