



SOP - Online Subscriptions

Iptor IP1

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1. Introduction

IBS Bookmaster has been greatly enhanced through the provision of web enablement products to integrate essential functions of web ordering, digital product delivery and online subscription ordering. These functions have been integrated into the existing framework of Bookmaster, where sale of digital products and online subscriptions can be achieved by using either the Bookmaster e-commerce application or the customers own website.

Customers using their own websites will manage the sales interaction with the users and Bookmaster via the Web Services provided by IBS, which will allow publisher's customers to transact directly into the Bookmaster system.

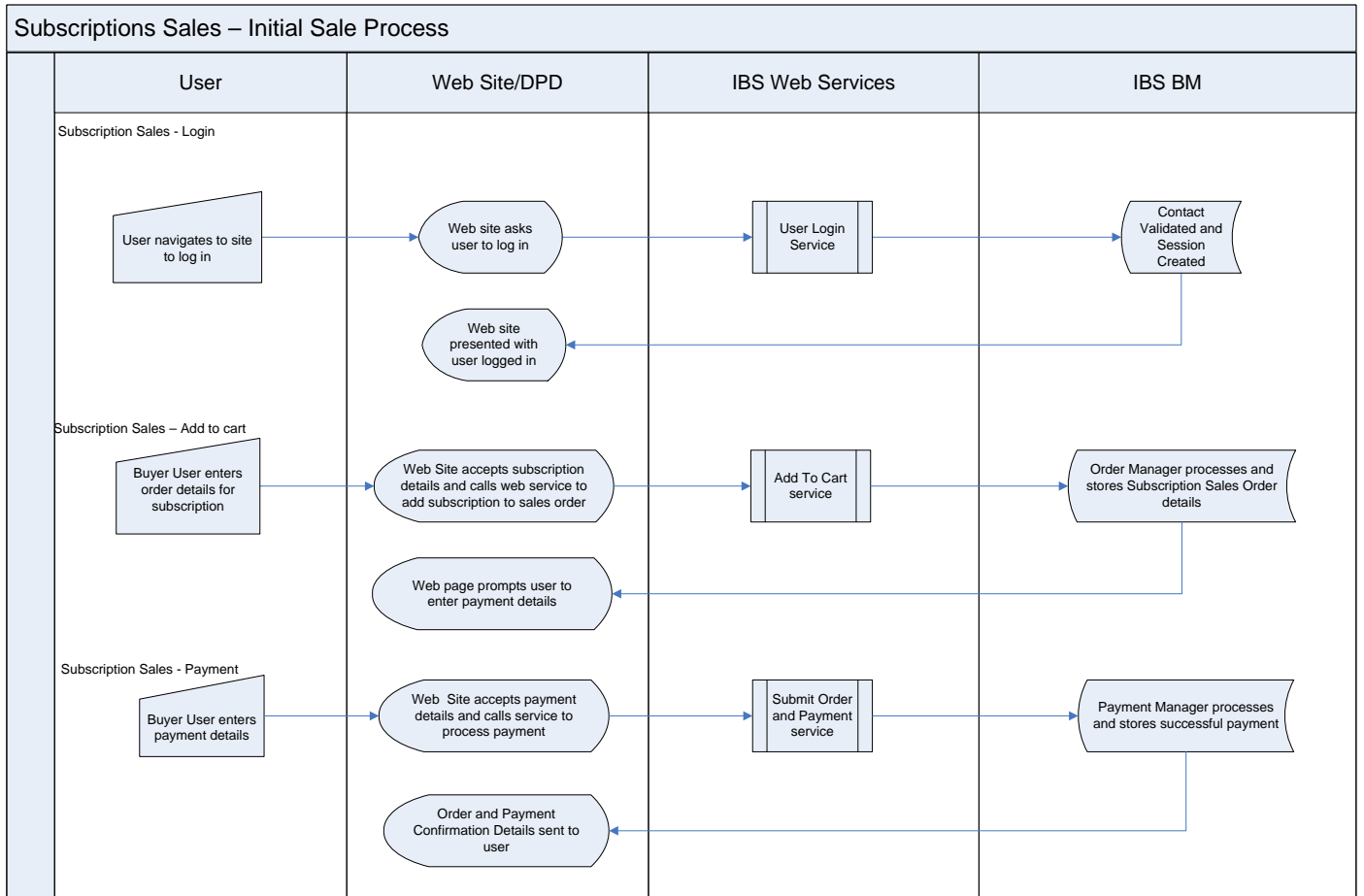
Bookmaster will be used as the primary system to manage the core operation including the generation of distribution and financial transactions such as sales invoice and payment transactions.

Publishers can either directly manage the delivery of digital product or use the services of Digital Product Distributors (DPD) to handle the download. If the publisher directly manages the delivery of the digital product, Bookmaster involvement will be limited to the generation of the distribution sales and payment transactions. If a DPD handles the downloading it will be required to interface with IBS Web Services. An access code has to be generated either by DPD or Bookmaster, which when emailed to the user will provide the download access.

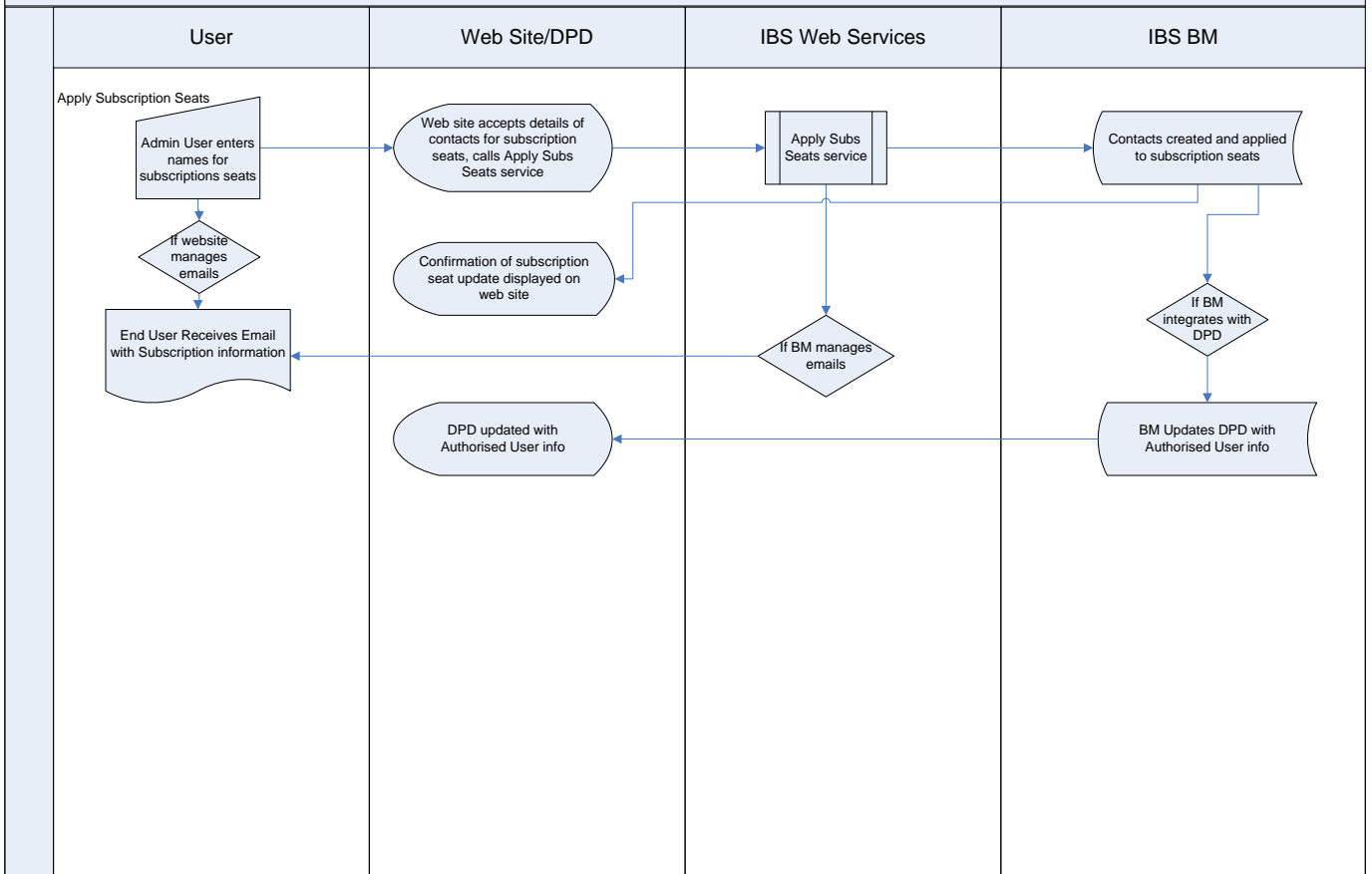
2. Process Flows

Individuals using this procedure should become familiar with the following process flows for Online Subscriptions process.

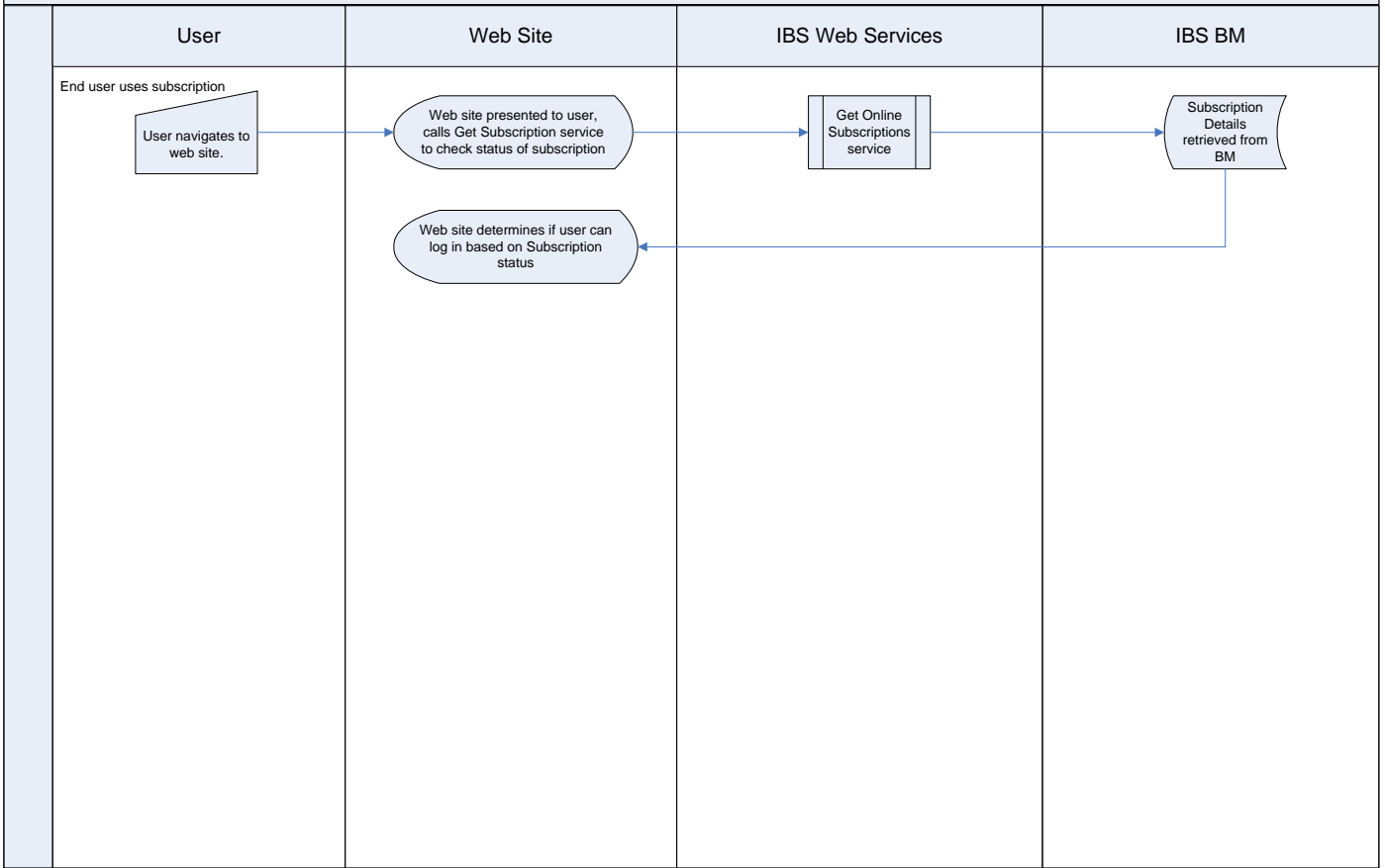
2.1 Online Subscriptions Processes



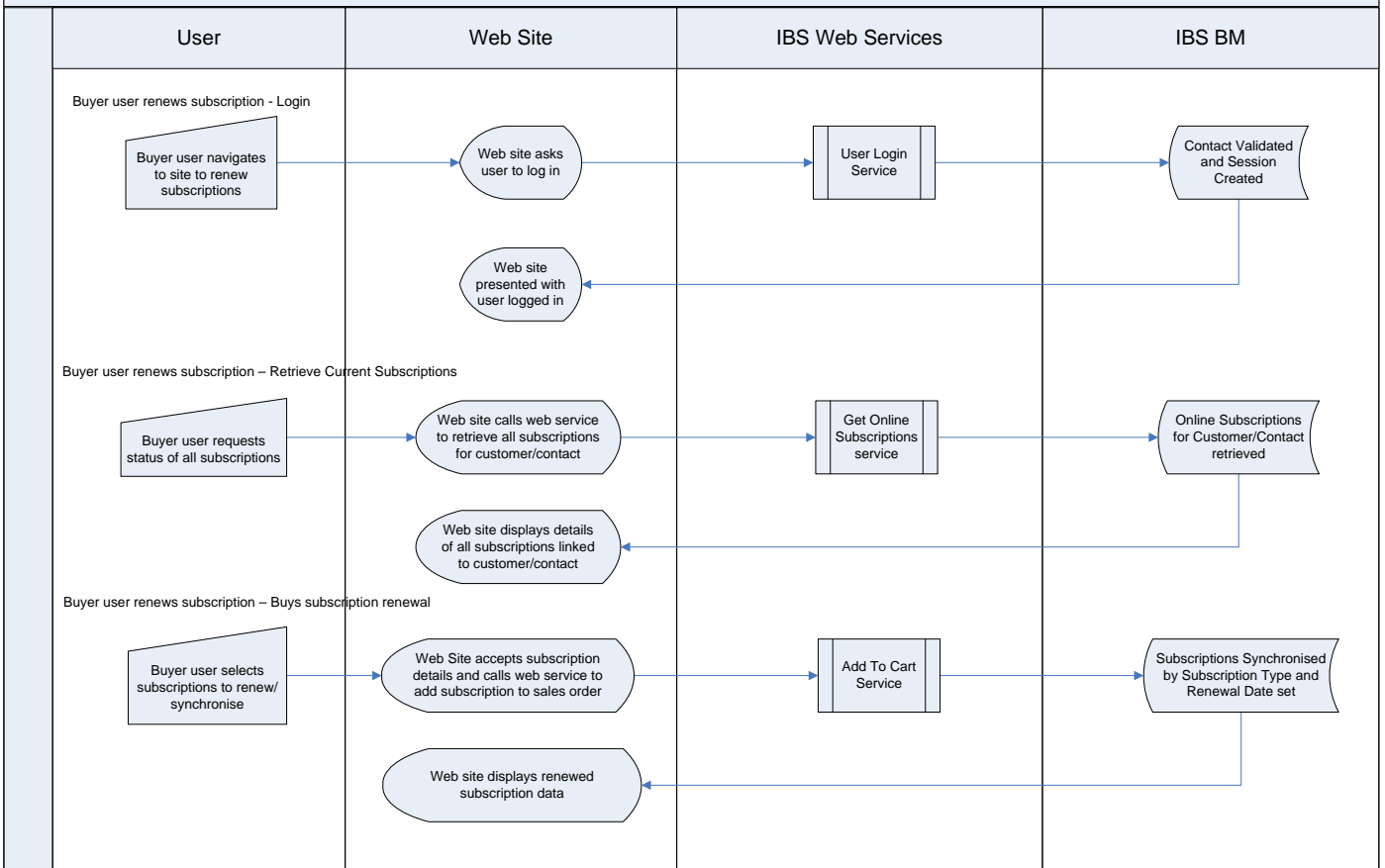
Subscriptions Sales – Apply Subscription Seats



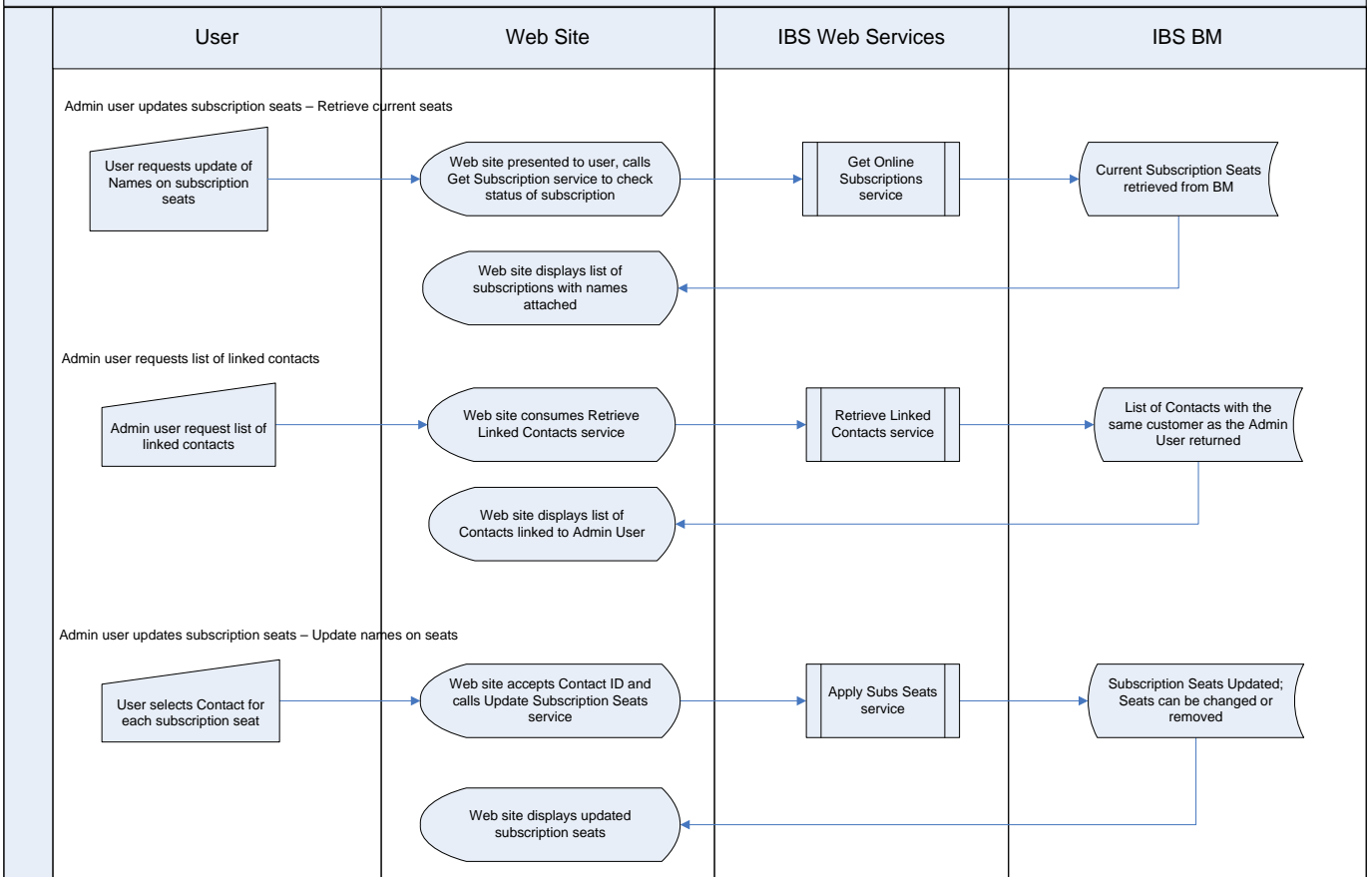
Subscription Usage



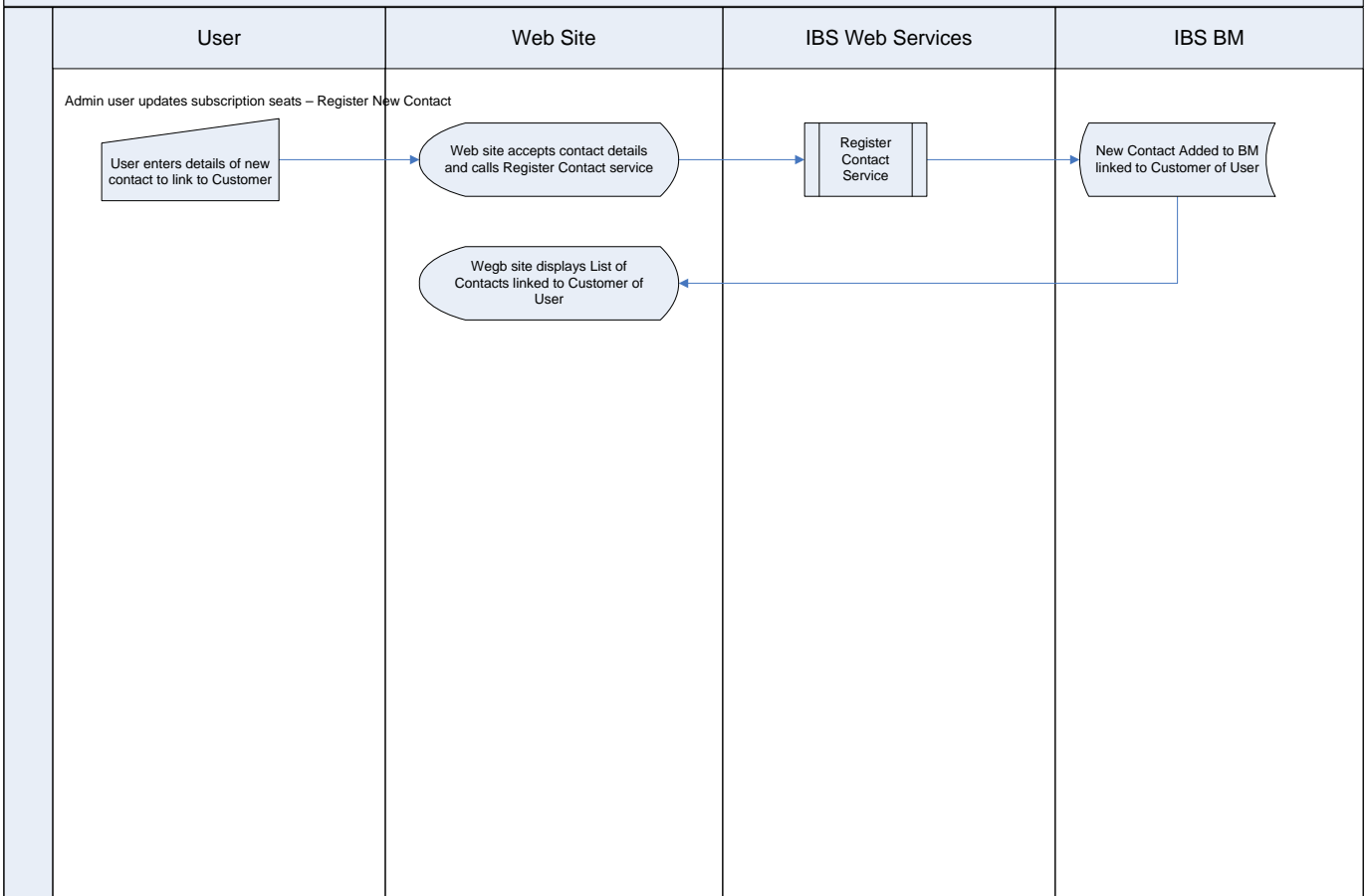
Subscription Sales – Renewal Process



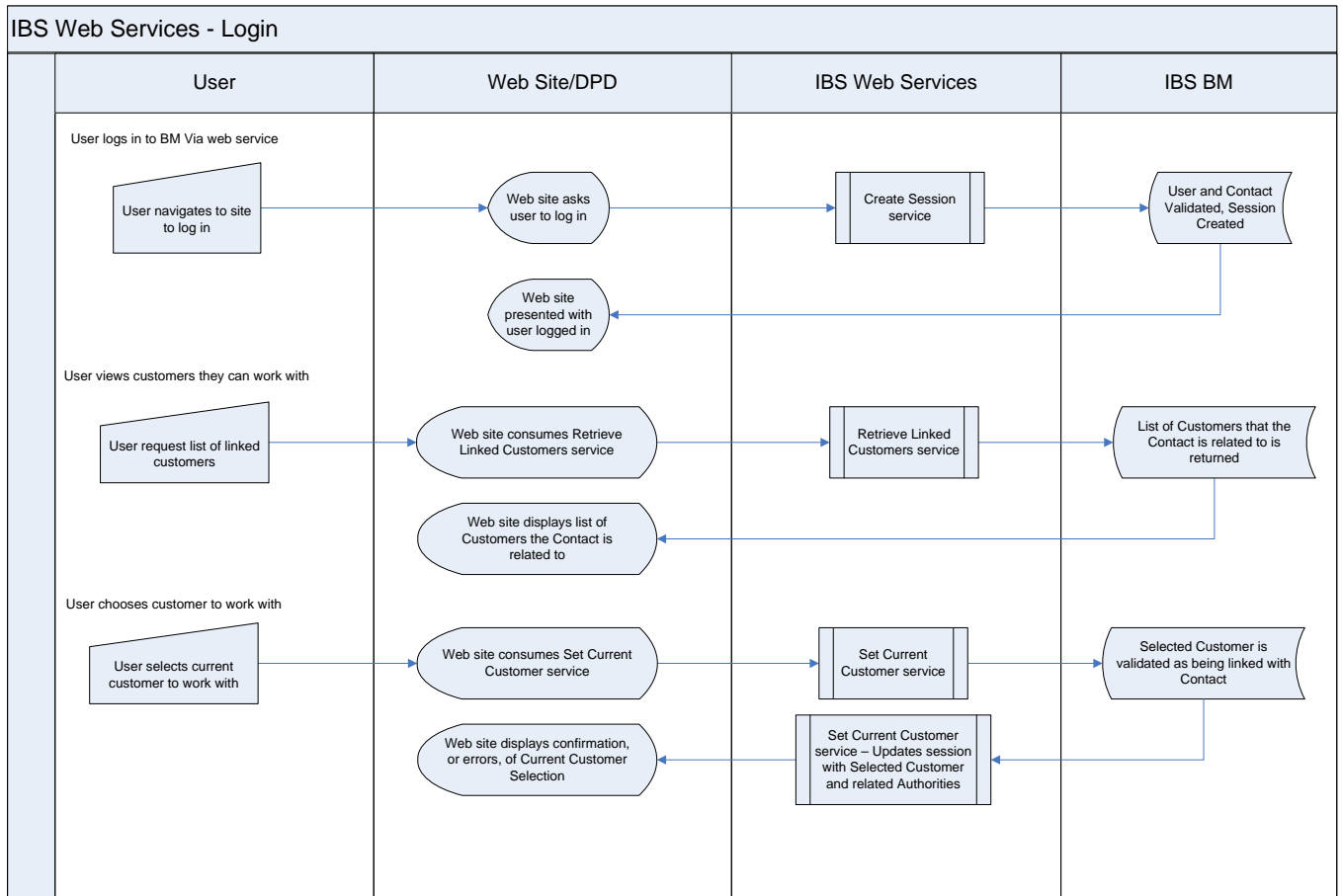
Subscriptions Sales – Seat Update Process



Subscriptions Sales – Seat Update Process



2.2 Web Services Process



3. Online Subscriptions Process

It is your responsibility to ensure that you understand this procedure before performing the following tasks. This document does not cover individual operation procedures of specific companies.

Note: Deviations from this procedure should be covered by procedures written by your company. Before performing any tasks please ensure all the business rules are set-up accordingly.

3.1 Process Initial Online Subscription Sales via Web

Step	Action
1	Buyer logs into the <i>website</i> .
2	Web enablement will integrate with Bookmaster to validate username and password. Note: The contact details such as name, customer account number, and any other relevant information that are stored in Bookmaster will be retrieved by the website. If the user name and/or password are invalid or the user exists but is not an authorised buyer, an error message will be displayed by the website.
3	Web enablement will provide details of subscriptions available including subscription ID and terms from Bookmaster. The buyer can select the subscription and enter the order details including the number of users, effective from date and length of subscription. Note: The subscription sales and corresponding A/R transactions will be generated in Bookmaster.
4	Web enablement will allow Payment Manger to accept credit card payment. Note: If a payment has been received with the subscription, an A/R payment record will be created.
5	A subscription order will be created in Bookmaster with the start, expiry, and renewal dates, number of users, and all the other relevant subscription details. Bookmaster will handle the deferment and subsequent recognition of the revenue. Sales invoice will then be sent to the buyer and/or administrator users with the URL and access information to access the subscribed information.

3.2 Register the End Users

If the subscription type is by number of concurrent users, there is no need to register the end users. The subscription DPD will validate the quantity of concurrent users allowed to access the subscription at time of use.

If the subscription is a 'named' subscription, the end users will need to be added as contact records (if they do not yet exist in the contact file) and linked to the subscription by the administrator before the subscription can be accessed by the end users.

Step	Action
1	Administrator or buyer to add end users of the subscription.
2	Bookmaster will also send the end user details to the DPD if required. Alternatively, the DPD can send a request to Bookmaster to check the validity of an end user who has requested access to a subscription.

3.3 Accessing the Subscription

Step	Action
1	User logs on to <i>website</i> and enters the subscription ID.
2	Web enablement retrieves a list of valid transactions from Bookmaster for the user.
3	User selects subscription to exercise.
4	User accesses the subscription depending on the subscription status. Alternatively the DPD will handle the validation and decide the access or denial to the subscription. DPD can also query Bookmaster to check the status of the subscription.

3.4 Maintain the Subscription

Step	Action
1	Administrator or buyer logs in to the <i>website</i> .

2	The user is validated to ensure that the user has administrator/buyer authority to maintain the subscription order.
3	Additional users can be added to the subscription by the buyer. This will create a separate order with the same subscription ID but with a different start, expiry, and renewal dates. For 'named' subscriptions additional subscriber's details are created as contact records (if they do not yet exist in the contact file) and are linked to the subscription. Existing 'named' subscribers can also be amended.
4	The handling of the deferred revenue, generation of sales invoice, and interfacing with the DPD will be the same as in a new subscription order.

3.5 Renewal of Existing Subscription

Step	Action
1	Renewal notification will be produced by Bookmaster. When generating the renewal notification of the first subscription order that is about to expire for a particular subscription ID with multiple orders, an option will be provided to consolidate the renewals of all the orders within the same subscription ID into a single order with a common expiry date. The renewal notification will provide both options of renewing the particular order that is going to expire or consolidating and renewing all the orders into a single order with a common expiry date.
2	A report of all the subscription due for renewal can be generated for review / follow up with the customers by customer service personnel.
3	The buyer logs into the <i>website</i> .
4	The buyer is validated to ensure that the user has valid authority to renew the subscription orders.
5	Bookmaster will provide the list of subscription orders for renewal to the website.
7	The website will handle the online renewal and send the details to Bookmaster.
8	Bookmaster will process the renewal orders in a similar manner as a normal order, including the generation of the invoices and sales delivery instructions. Alternatively the buyer may send a purchase order to the customer service person who

	will then enter the new order using the standard order entry processing.
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3.6 Cancellation of Existing Subscription

Step	Action
1	Buyer user logs on.
2	Check that the user has valid authority to cancel subscription.
3	The subscription order is cancelled and the DPD is informed of the cancellation.
4	Bookmaster will not automatically generate an A/R credit note since the refundable amount is subject to various factors that are not all measurable in the system.