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# SMO005 Subscription Orders Generation

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## Overview

The Subscription Order Release program generates the Release or Bulk Run process. In this process the Product Lists are linked to the Subscription Lists (customers) determining which ISBNs are to be dispatched for which customers. Multiple Subscription Lists can be released against the same Product List.

If the Product List and Subscription List have similar identification codes, the margin for error is reduced. Transactions to either dispatch Titles or issue renewals are created. A list of the transactions generated can be reviewed and any changes made via the menu option Release Run Management. A Run has to be specifically flagged as completed and until this is done, runs can be cancelled and regenerated until the operator is satisfied with the results. Subscription orders can also be generated for digital products.

Subscriptions can be excluded for stopped or closed customers.

Credit lines are generated if there are Fixed Service Plan (FSP) subscription printed items and charge method is 'Pay as You Go'. This is to recognize revenue as each subscription for printed items is released.

The Subscription Count increments whenever a subscription order is released / generated.

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## Explanation

Book Club shipments use the release process by building a "release product set", (which would be the titles for the shipment) and then this list is applied to all the subscribers in the subscriber list for the Book Club. A preliminary orders work file is generated that can be listed in summary or detail for checking purposes (if required) before sending through to fulfilment. The generated orders then pass through normal order processing including pending checks and backorder generation in case the stock is not available.

The number of orders generated is limited per run which permits the user to adapt the volumes and maximize efficiency. Orders missed in the first sweep should be picked up in subsequent sweeps and still be grouped by carrier sequence.

Invoices are selected by carrier and ADC sort sequence in order to minimize freight costs.

Select by subscription order status (for example new customers being those with a New status, meaning they have not yet had a shipment of Book Club books before). New subscribers can be released against two product sets, the shipment for this cycle plus a bonus product set if there is a bonus incentive.

A trigger updates the status for the processed subscriptions from New to Active.

Subscribers who have not received this product set yet (this caters for any re-instated subscriptions that missed the first release of the product set as the releasing of a specific product set can take place over a number of weeks) are selected.

Payment points are generated for marked subscriptions.

Event based subscription are allowed to be renewed by time or by event. If a subs term is defined with time definition on TMSSM/SL-STRMT, this subscription will be renewed by time. If there is no time definition then it will be renewed by event.

Customer groups for PIA anniversary subscriptions that are renewed manually can be excluded in Bulk Renewal Process using control file TMSSM/SMO005-C.

When renewing PIA subscriptions if the renewal item is not on the product list the system will use the renewal item from the subscription list.

## Examples

This section illustrates examples concerning:

[Example 1: Subscription order release](#)

[Example 2: Display subscription product list details](#)

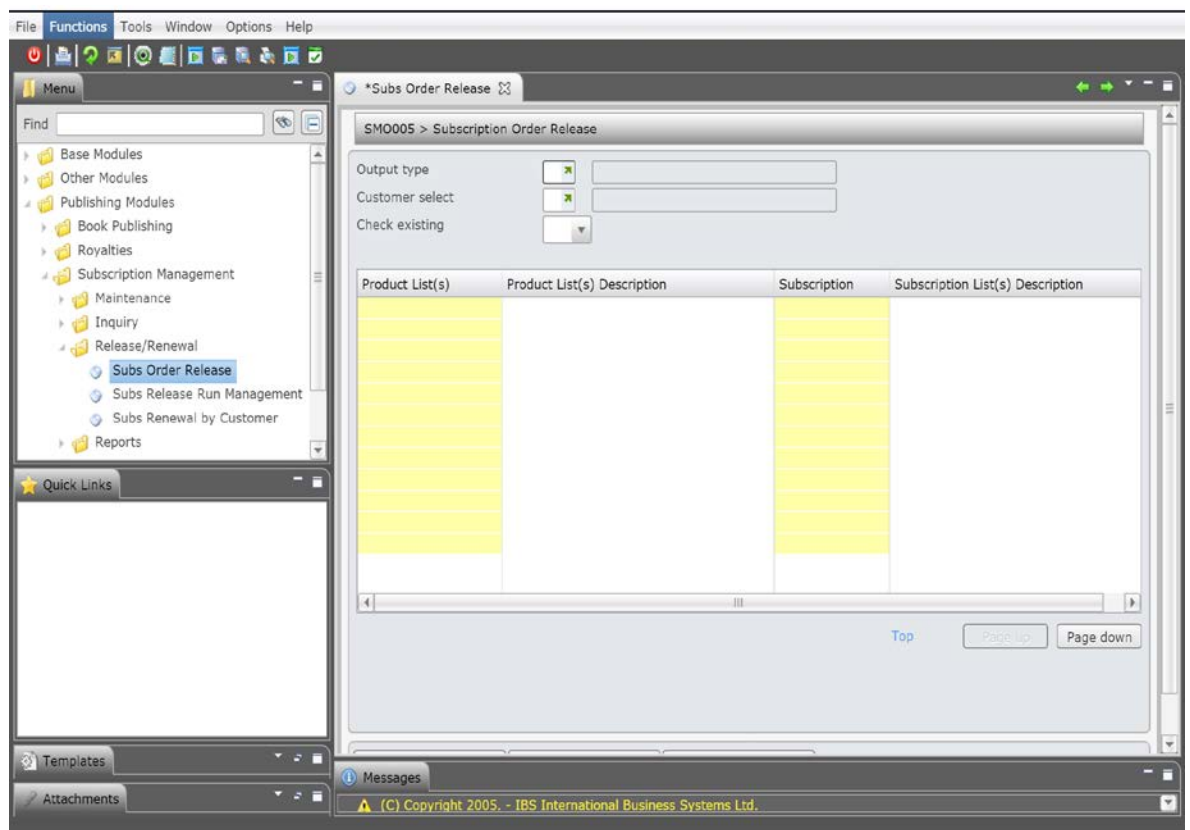
[Example 3: Display subscription list detail](#)

### Example 1: Subscription order release

This example describes subscription order release.

1. Select menu option **Subs Order Release** from Publishing Modules>Subscription Management>Release/Renewal menu.

**SMO005 Subscription Order Release** main panel is displayed.



### Options

[Prod list](#)

Access Subscription Product List panel

Subs list	Access Subscription List Maintenance panel
<b>Relevant fields</b>	
Output type	Select the method of output and whether Product lists are Charge or No Charge. Charge depends on the set up in Control File TMSSM/SP-TYP.
Customer select	Select a Subscription selection rule as defined in TMSSM/SMO005-A.
Check existing	Select <b>Yes</b> if you would like the system to check for existing orders so the system checks the delivered and backordered quantities and prevents subscription releases being sent out twice.
Product list	<p>A unique Product List identification code. It is usually recommended a code be created relating to the Subscription List to be charged when using this Product List. There are normally two kinds of Product Lists, one for releases and one for renewals. For example CPPCDREN for Criminal Practice &amp; Procedure CD Renewals and CPPCDREL for Criminal Practice &amp; Procedure CD Releases.</p> <p>It is important to select the correct List as the system handles the processing differently depending of the List Type</p> <p>One Product List can be used for both a release and a renewal in which case the ISBNs on the list need to be changed prior to a release being run.</p> <p>In Release Run Management if a specific Product List is required the List Id can be entered otherwise leave the field blank to select all Product Lists.</p> <p>When releasing subscription orders enter the Product List prepared for the release or bulk run.</p>
Subscription list	<p>A name or code to be used to identify this Subscription List (Sub List) is required. This name usually relates to the title being subscribed to and if the title comes in a number of formats like CD, tape, hardcover, softcover, etc. a Subscription List for each one of these titles needs to be created. This is not the ISBN set up on the Title Masterfile but rather a similar code to easily identify the products being supplied. The actual ISBN can be used as a Subscription List Identification if it is the company preference. To denote the format options, the same core number can be used with a suffix of say C for CD and O for On-line, etc. This Sub List ID code can be a maximum of 8 alphanumeric characters.</p> <p>For example: SIMC for Simms Court Practice</p> <p>In Release Run Management, if a specific Subscription List is required the List Id can be entered. Leave the field blank to select all Subscription Lists.</p> <p>When releasing subscription orders, enter the Subscription List to be used for the release. Multiple Subscription Lists can be used with one Product List.</p>

2. Enter required fields and click **OK**.

**SMO005 Subscription Order Release** panel is displayed.

The screenshot shows a software window titled "SMO005 > Subscription Order Release". The window has a menu bar (File, Functions, Tools, Window, Help) and a toolbar. On the left, there is a "Menu" pane with a tree view showing modules like Base Modules, Other Modules, Publishing Modules, Royalties, Subscription Management, Maintenance, Inquiry, Release/Renewal, Subs Order Release (selected), Subs Release Run Management, Subs Renewal by Customer, and Reports. Below the menu is a "Quick Links" section. At the bottom left are "Templates" and "Attachments" tabs. The main area contains the "Subscription Order Release" form. It includes an "Output type" field with a dropdown set to "Order release". Below this is a section titled "<Optional overrides>" with fields for Source of order, Picking method, Document type, Document sub-type, Order category, Order consolidation, Back order, Warehouse, and Immed picking slip. The Immed picking slip field has a checkbox and a label "Yes,No,Blank". At the bottom of the form are three text input fields for "Special instructions" and "Warehouse instructions". At the very bottom of the window are "OK", "Cancel", and "Exit" buttons, along with a "Messages" icon.

### Relevant field

#### Output type

Select the method of output and whether Product lists are Charge of No. Charge depends on the set up in Control File TMSSM/SP-TYP.

#### Special instructions

Enter any special instructions to be printed on the invoice. This is a free format text field. An example of its use could be for renewals where one generic title has been created for all renewals. This text can be used to reflect the renewal period.

#### Warehouse instructions

##### Renewal date

This is the specific date on which renewal notices are to be sent out. For Renewal Product Lists, when a release is finalized, the system checks the Charge Method and Term Type and calculates the next renewal date on either the header or all the orders – for time based subscriptions. The header date is updated in the case of fixed renewals and the order level renewal date is updated in the case of anniversary renewals. The renewal date can be before today's date with a warning only displaying.

##### Warehouse instructions

Enter any warehouse instructions to be printed on the picking slips. This is a free format text field.

3. Click **OK**.

**XAR905 Order Release** panel is displayed.

4. Click **OK** to release the order.

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### Example 2: Display subscription product list details

This example describes how to display subscription product list details.

1. Repeat step 1 as in [Example 1: Subscription order release](#)
2. Click **Prod list**.

**SMW100 Subscription Product List** panel is displayed in inquiry mode.

Please refer **SMW100 Subscription Product List** for further detail.

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### Example 3: Display subscription list detail

This example describes how to display subscription list details.

1. Repeat step 1 as in [Example 1: Subscription order release](#)
2. Click option **Subs list**.

**SMW010A Subscription List Maintenance** panel is displayed in inquiry mode.

Please refer **SMW010A Subscription List Maintenance** for further detail.