FLEXX®
Subscriptions
Reference Manual

Version 7.0L0

Databyte

Δ

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1.0 Introduction

1.1 About Subscriptions

The Subscriptions module allows entry of new subscriptions and tracks them from entering the order to shipment and receipt of payment. Using subscriptions you can:

Δ Enter subscription orders for items that are shipped on a regular basis when editions of the items change.

Δ Refund subscription orders that have been cancelled

Δ Replace editions that have been lost or damaged

Δ Track subscription history

Δ Purge Subscription that need to be completely deleted if they have open status

Δ Invoice Subscriptions

Δ Generate Renewals for subscriptions about to expire

Δ Print numerous user Definable Reports

Note: For more details on the Subscription procedures, please refer to the Specialty Procedures Guide, topic *Subscription Process*.

Subscriptions and FLEXX The subscriptions module is fully integrated with these FLEXX modules

Δ AR - Subscriptions shares the same customer master table with AR so the customer is only entered once. Once a subscription has been ordered, an invoice is created in FLEXX AR where the tracking and payment or receivables takes place.

Δ OP - Subscriptions users Order Processing to generate the initial order and ties to GL the GL Accounts with regard to sales.

Δ IC - Subscriptions users inventory control to maintain the product the customer may order. Inventory is defined, priced, costed and tracked here.

1.2 About this Manual

Description

This manual describes the forms and functions in subscriptions. It contains the following sections:

Δ Starting Subscriptions Process; describes how to get into the Subscription module.

Δ Working with Subscription Transactions; describes the forms you use to add, find and modify subscription transactions, including prepaid and regular billed orders.

Δ Extracting Subscription Information; describes how to print Subscription reports and to perform on form analysis.

Manual Conventions

We use an asterisk (*) to indicate wildcards. However, different database systems use different symbols for wildcards. See the table below. Ask your System Administrator which symbol to use.

Database	To Match All	To match One
MS SQL Server	%	_(underscore)
Oracle	%	_(underscore)
Sybase	%	_(underscore)

Δ Information that you enter and information that appears on the form appears in bold type. Example: Enter **Y** in the **Begin Process**? field

Δ References to other sections are italicized. Example: *(See 2.0 Starting Sub)*
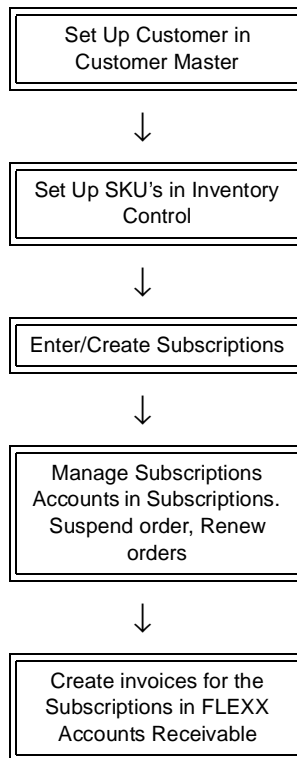
Other FLEXX Tables Needed

The following tables may also be needed to fully use all of the capabilities of Subscriptions.

- Δ   Company Table *
- Δ   Division Table *
- Δ   Warehouse Table *
- Δ   Salesperson Table *
- Δ   SKU Master Table - See FLEXX Inventory Control manual
- Δ   Tax table *
- Δ   Customer Master Table *
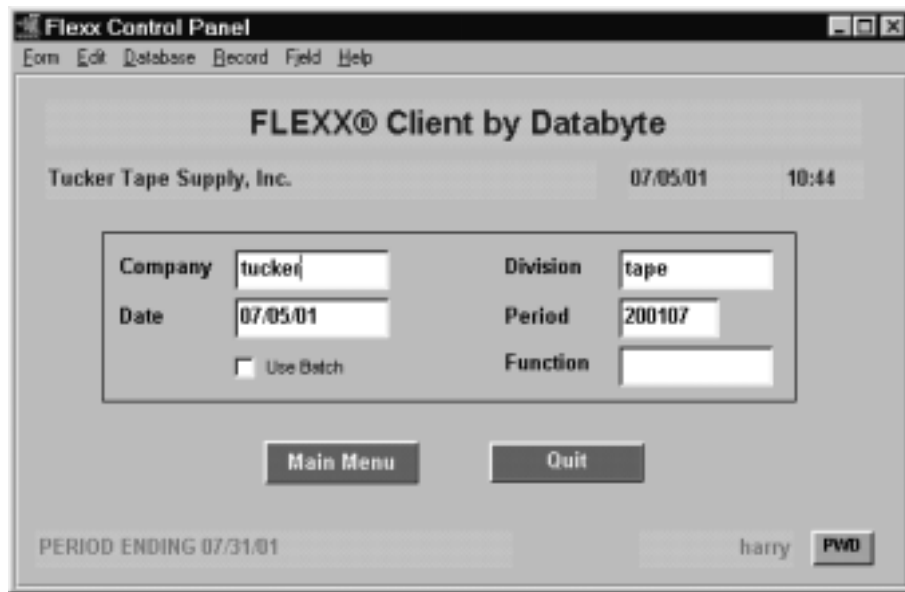
* See FLEXX Getting Started Manual

1.3   Subscription Sequence of Operations

```
┌─────────────────────────┐
│   Set Up Customer in    │
│     Customer Master     │
└─────────────────────────┘
             ↓
┌─────────────────────────┐
│  Set Up SKU's in Inventory │
│         Control         │
└─────────────────────────┘
             ↓
┌─────────────────────────┐
│  Enter/Create Subscriptions │
└─────────────────────────┘
             ↓
┌─────────────────────────┐
│   Manage Subscriptions  │
│ Accounts in Subscriptions. │
│  Suspend order, Renew   │
│         orders          │
└─────────────────────────┘
             ↓
┌─────────────────────────┐
│   Create invoices for the │
│    Subscriptions in FLEXX │
│    Accounts Receivable  │
└─────────────────────────┘
```

2.0   Starting Subscriptions

To start subscriptions, log onto FLEXX. The session default appears.

This form lets you set up the defaults for the session. For example, if you plan to work with accounts in one company/division during a session, enter the company and division codes here. During the session, these codes appear automatically in the **Company** and **Division** fields whenever you have a blank form or new record. You can overwrite the session defaults any time they appear on a form.

Fields   Enter the following information.

| Field	Entry	Default	Reqd
Company	The default company code. Use Zoom to select from a list of companies.	Set by System Administrator	Y
Division	The default division code. Use Zoom to select from a list of division.	Set by System Administrator	Y
Date	The default date.	System Date	Y
Period	The default period number.	GL Period Table	Y
Use Batch	Select this option by clicking the box. Batch control lets you group similar Contact Manager transactions together and enter, edit and post them as a whole using a unique batch number. Each Contact Manager transaction in the batch still has a transaction number. If you selected B/C, the Batch Control screen appears when you first go to add a transaction.		Y
Function	To quickly access a specific FLEXX module, enter the code for the module, then <<press Main Menu>>. Example: To go straight to Subscriptions and bypass the Main Menu, type mainsub in this field and <<press Enter>> Twice. See the Session Defaults section of your *Getting Started* manual for more information.		N
Buttons			
Main Menu	Access the FLEXX main menu		
Quit	Terminate the FLEXX session.		
PWD	Press this button to change both the user's Logon password and the FLEXX Authorization password *(See Administration Manual, User Master description).*		

Press **Main Menu**. The FLEXX Main Menu Appears.
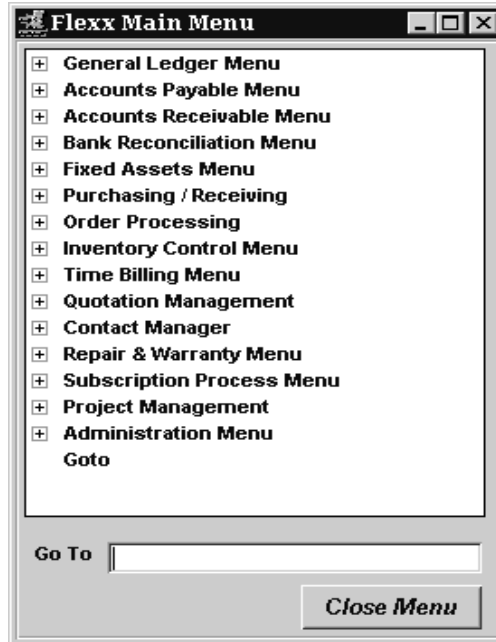
Select Subscription Process Menu. The Subscriptions Main Menu appears.
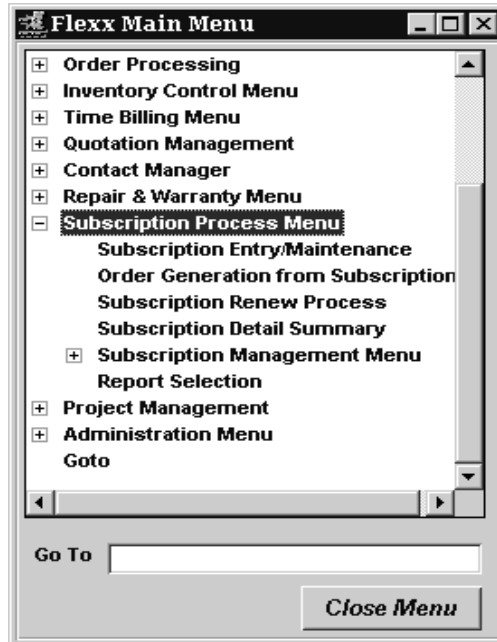
3.0   Working with Subscriptions

3.1   Subscription Entry/Maintenance

Description   The Subscription Entry/Maintenance form allows you to create a subscription header which can be used as a basis to:

Δ   manage an existing subscription,

Δ   enter a new subscription,

Δ   replace Lost Editions,

Δ   Suspend a subscription,

Δ   create an Order from the subscription,

Δ   generate Invoices,

Δ   view Subscription History,

Δ   and also as a 'template' to Renew a subscription.

Once the header is created you can then go to subscription detail to enter the specifics of the subscription.

Select

Subscriptions Menu	→	Subscriptions Entry/ Maintenance
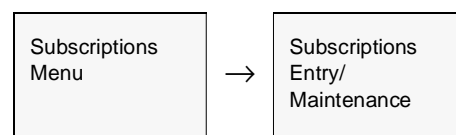
The Subscriptions Entry/Maintenance appears in Find Mode. To enter a new Subscription press <<Clear to Add>>.

Fields

The following fields appear on the form.

Fields	Entry	Default	Reqd
Company	The Company Code	Session Default	Y
Division	The Division Code	Session Default	Y
Subscription Number	The number of the subscription. Press Enter to let the system autogenerate the next available number	Autogen	
Subscription Date	The date the subscription is entered. Defaults to date on session default.	Session Default	Y
Customer	The Customer Code and Name placing the subscription order.		Y
Customer PO	Customers PO number if available.		Y
Amount	The total value (before taxes) of the order.	System Generated	Y
Description	Any user defined description of the order entered.		Y

Fields	Entry	Default	Reqd
Address Tab			
Bill To	Customers Bill to Address where billings will be sent. Defaults from Customer Master	Customer Master	Y
Ship To	Customer ship to. Where product will be shipped to. Defaults address from Customer Master	Customer Master	Y
Select the Ship & Financial Tab to view the following information			

Ship Via	The Shippings method used to ship the subscription order back to the customer	Customer Ship To	N
Carrier	The preferred carrier used to ship the subscription to the customer	Customer Ship To	N
Freight	The code used to identify how the freight charges are to be paid.	Customer Ship To	N
Invoice	If the Bill Account Subscription has been invoiced, the resulting invoice is displayed here. Zoom on invoice number to view it.		N
Credit Memo	If the subscription has been paid and needs to be refunded the resulting credit memo number is shown here.	System Generated	N

Fields	Entry	Default	Reqd
Currency	The customer currency code. the currency the customer does business in and the resulting invoice will be denominated in.	Customer master	Y
Job Code	If the sale is related to a job defined in FLEXX Job Costing, enter the appropriate job number.		N
Sales Rep	The code of the sales person responsible for the sale.	Customer Master	N
Tax	If the subscription is subjected to State tax, then this field should be selected. FLEXX then looks at the tax jurisdictions and rates as defined on the customers ship to location. The resulting tax is calculated when the invoice is generated and displayed on the invoice in FLEXX Accounts Receivable.	Customer Master	Y
Total Tax Amount	The Total Tax Amount that will be shown on the invoice	Sys. Gen from Subsc Detail	
VAT	The applicable VAT/GST Type needs to be entered if the order is subject to VAT. The rate of VAT to be charged is determined by the VAT code assigned to each SKU. (*See FLEXX Inventory Control Manual*)	Customer Master	
Total VAT Amount	The Amount of VAT to be calculated and shown on the invoice.	Sys. Gen from Subsc Detail	
Status	• **o** - open. Subscription is in open status, implying not paid. • **c** - cancelled. Indicates the subscription has been cancelled. This is accomplished by manually changing the status to 'c'. Once it has been cancelled, it can no longer be changed to any other status. • **p** - paid. When paid, the resulting invoice number will be shown in the Invoice field. • **e** - expired. The subscription is beyond the specified Expiry Date defined on the Detail form. • **s** - suspended. Subscription has been suspended thus putting it into a temporary hold status. This is accomplished by manually setting the status to 's', either on the header form or on the Subscription Detail Summary form *(described later)*. • **b** - partial paid. Subscription has been partially paid. Order cannot be generated until fully paid. • r - credit hold. Subscription is in Credit Hold and must be released before an order can be generated.		
Credit Allowed	If the subscription is set up as prepaid it will be set here, otherwise, the Bill Account or COD flag will be set as defined on the Customer Master. If is possible to change status to a lower level (ex. Bill Account to Prepaid or COD) but once saved cannot change to a higher level.	Customer Master	Y
Pricing/ Discount Type	Customer price type. This price type is used by the pricing matrix in FLEXX Inventory Control to determine the price charge to the customer *(See FLEXX Inventory Control Manual)*	Customer Master	Y
Discount Line	Allows a line item discount (defined in Customer Master table -*See FLEXX Getting Started Manual*) To be applied to the overall order regardless of other discounts already in place.	Customer Master	N

Fields	Entry	Default	Reqd
Order Discount	This discount field is loaded from the Customer Master and copied to the order detail. It is used to define whole order discounts based upon the whole order value. **Note: Line items not to be discounted by this process should have their individual whole discount field cleared.**	Customer Master	
Entered By @	As soon as the add/update button on the subscription header is pressed FLEXX will populate the field with the user ID of the person entering the order as well as the date it was entered.	System Generated	

Once all of the information has been entered/viewed on the tab forms, the buttons have the following meanings:

Credit	This button will be active if the Subscription order is in Credit Hold status.
Refund All	This button is enabled once a subscription is paid. Pressing this will refund the whole subscription and create a credit memo in Accounts Receivable.
Invoice or **Payment**	If the Subscription is marked "Bill Account" the Invoice button will be active. Press the button to generate an Invoice. If the Subscription is marked "Prepaid" the Payment button will be active. Press this button to present the Accept Payment form. Payment type (check, Visa, etc.) is selected as well as other payment information. Order cannot be generated until payment is made.
Details	Brings up the subscription entry detail form. *(See section 3.2).*
Generating Initial Order	After all information is entered and saved on the subscription header and detail, the Generate Initial Order button is enabled. Pressing it will generate an order in OP which will need to be released and shipped to complete (the same as a regular order *See Order Processing*) and inventory to be adjusted.

3.2 *Subscription Detail*

Description   The Subscription Detail form contains information about what is being ordered. Once all the SKU parts are ordered, the subscription paid, the initial order can be generated.

There is also a rapid entry on the subscription detail. With this option, the detail line is automatically saved when the cursor is entered past the SKU description. Should it be necessary to change anything on the detail at time of entry (i.e. price) un-select this option.

Select

| Subscription Entry/ Maintenance | → | <<Find>> desired order and select Detail button | → | Subscription Detail |
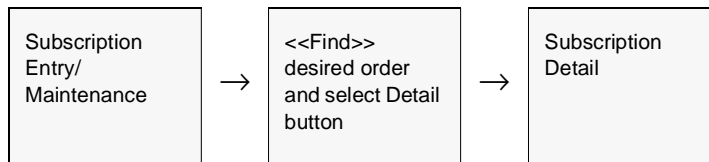
The subscription Detail form appears in Update mode.

Fields

The following fields appear on the form.

Fields	Entry	Default	Reqd
Part Number	The SKU code representing the parts requested by the customer. These SKU's are set up in FLEXX Inventory Control *(See the FLEXX Inventory Control Manual - SKU Master)*.		Y
Sell UOM	The Unit of Measure the item will be sold in as defined on the SKU Attributes form. The UOM can be changed to another validly priced value.	SKU Master	Y
Quantity	The quantity of the goods being ordered.	1.00	Y
Description	Full description of the SKU part being ordered.	SKU Master	N
Stock Unit Price	The unit price including discounts specified on the Pricing Tab. If the List Price on the Pricing Tab is changed it will be recalculated on entry. If the customer's currency is other than the Company's, the entered unit price will be the effective price in the customer's currency.	System Generated	Y
Extended Price	The extended price determined by multiplying the number of units ordered by the list price including all discounts. If the List Price on the Pricing Tab is changed it will be recalculated. If the item has a Minimum price defined, the Extended Price will be adjusted accordingly.	System Generated	Y
Status	The Subscription detail status can be: • a - active. • e - expired. This subscription line has expired and no orders can be generated from this subscription detail line. •s - suspend. This order line can be temporarily suspended. No orders can be generated while it is in s status but can be changed back to a at any time. •c - cancelled. Order detail lines can manually be changed to cancelled to ensure no orders will again be generated for this line.		
Text	Y if there is already text entered, N if not. <<Zoom>> to enter unlimited text about this order detail line. Access to the text is disallowed until the order detail line has been saved.	N	N
Sell Priced	If the Sell UOM entered has a price defined, the Sell Priced flag will be set. If some other UOM is used. FLEXX will not mark the sell priced flag and will use the Stocking UOM price to price the item.		
Current Edition #	If editions is being used, the current edition is displayed.	SKU Master	
Cutoff Date	The Cutoff Date of the current edition.	SKU Master	
Order Discount	If there is an order discount press the price order button and the whole order will be recalculated with the order discount shown here.	System Generated	
Order Detail Total	The total of the detail lines including all calculated discounts.	System Generated	

Fields	Entry	Default	Reqd
Job Code	This field is only used for **Job Costing** purposes *(See Flexx Project Management Manual for more details)*. Enter the job code that will be used to track the COGS expenses by specific Job (used by FLEXX Project Management if installed.)	Order Header	N
Resource	Enter the Job Costing Resource code to be used with the specified job (used by FLEXX Project Management (Job Costing) if installed.). Required codes must be defined in the Resource Table (zoom on resource Code).		N
Edition tab shows the following:			
Send Initial Edition #	Shows the first edition to be sent on this subscription; can be set to the current edition by pressing the Set Current button or by manually entering a valid edition. The current edition can only be sent if the order date is earlier that the edition cutoff date		
Cycles Ordered	The number of cycles in the edition for the subscription. This can be changed if some other value is required.This is useful if the subscription is somewhere in the middle of the edition cycle and only the remaining cycles are to be ordered,	SKU Master	Y
Start Date	The start date of the edition to be sent	Session Default	Y
Expiry Date	The date the cycles expire for the SKU subscribed.	SKU Master	Y
Remaining Cycles	The cycles ordered minus the cycles that have been sent. Updated each time an edition is sent.	System Generated	
Cycles in Subscription	The full number of cycles in a complete edition.	SKU Master	
Set Current Button	Sets the initial edition number to the current edition.		
Last Order Gen Date	Shows the date the subscription order was last generated for.	System Generated	
Last Shipped Edition #	Shows the last edition number shipped for this order.	System Generated.	N
Previous Subscription #	If the subscription was renewed, the previous subscription to this one.	System Generated	
Renew Sub#	If this subscription has been renewed the new subscription number.	System Generated	
Replacement button	Is used to cause FLEXX to generate a one time one cycle Replacement Renewal Subscription at zero cost, meant to replace a future edition. When this button is pressed a replacement reason text form appears so as to document the reason the edition is being replaced. This function is only active if the application control variable 'disc_code' for application sb has a code specified (ex. RP) and that code is defined in the Discount Table for a zero multiplier (0%)		
Rapid Entry	This field is selected when the Rapid Entry option is active. With this option active, the order detail line is automatically saved when the cursor is entered past the SKU description field. If it is necessary to change anything on the order detail at time entry, unselect this field first.		

Fields	Entry	Default	Reqd
\ **Press the Pricing Tab to review the following information**.

Seq	The sequence number determining the order of the detail lines	System Generated	Y
Grp	Specifies the group when BOM SKU's are ordered. Each BOM ordered will be assigned a higher group number.		N
Level	The Bill of Materials level. If the SKU part being ordered by the customer is a Bill of Material "parent" or if the SKU part is a SKU in its' own right it has a level of "O". If the SKU part is a subcomponent of a parent BOM, it will have a level of "1". If the SKU part is a subcomponent of a subcomponent of a parent BOM it will have a leave of "2" etc. *(For further details the FLEXX Inventory Control Manual - Bill of Materials)*	"O"	Y
Price Type	Customer price type. Used in conjunction with FLEXX Inventory Control - SKU Price Master to determine what pricing matrix to use.	Order Entry Header	N
Discounts	Discount codes for any discounts that may apply. Second level discount code can be entered in the next field.		N
Whole Order	Whole Order discount code used to apply discounts to the whole order when the Price Order button is pressed.		N

Fields	Entry	Default	Reqd
List Price	The price to be charged to the customer (before discounts) for the SKU being ordered. The price displayed is determined by the SKU Price Matrix (*See FLEXX Inventory Control Manual - Price Matrix)* and can be overridden by an authorized user (has orderprice authority).	SKU Master	Y
Net Unit Price	The unit price after all discounts have been applied (discounts and whole order)		
Net Ext Price	The extended price after all discounts have been applied. List price * quantity-discount-whole order discount)		
Sale Type	The Sale Type of the SKU Ordered. This sale type defaults from the SKU Master and is used during the Generate GL Transactions to determine which General Ledger accounts to use. Sale Type can be defined by customer sale type as opposed to SKU Master. If specified on the customer, this value will have priority over the SKU defined value.	SKU Master	Y
Tax	If the SKU being ordered is subject to taxation, this flag should be set. FLEXX uses this flag in combination with the tax jurisdictions defined for the customer (*See Getting Started Manual - Customer Ship To)* and the tax tables to calculate the appropriate taxes. This field is not automatically set from the Subscription Header. It is set according to the State Tax setting of the SKU.		Y
Currency	The currency of the customer placing the sales order.	Order Entry Header	Y
Invoice	If the subscription has been invoiced, this field will display the resulting invoice number.	System Generated	N
Credit Memo	If the Subscription has been credited, this field will display the resulting credit memo number	System Generated	N
Stocking QTY	The stocking quantity making up the Sell UOM taken from the UOM Table using the factor defined for that UOM.	SKU Master.	Y
Stock UOM	The UOM used in stocking as defined in the SKU master	SKU Master	Y
Sales Rep	The salesperson for this detail entry. The field is only active when using the multiple salespersons per customer function. *(See Getting Started, Customer Master description)*		

Fields	Entry	Default	Reqd
The Renew History tab shows the entire renewal history of the SKU (not just this order or customer) and the Subscription it was ordered on.			

Select the Renew History Tab to view the following

These fields are for information purposes only. No modifications may be made to these fields.

Date	The date of the subscriptions	System Generated from previous order records	
Subscrip #	The previous subscription numbers		
Sell UOM	The Unit of Measure the item will be sold in		
Quantity	The quantity of the SKU ordered		
Part Number	The SKU ordered		
Unit Price	The individual unit price of the SKU		
Ext Price	The unit price times the quantity ordered		
Expiry Date	The expiry date of the detail line.		
Status	The status of the subscription detail line. Can be a, e, s, or c.		

Fields	Entry	Default	Reqd
Buttons			
Override	Press this button if the list price, price type and discounts need to be modified. **Note: Only authorized users can modify these values (Authorized Entry/ Maintenance in Administrators Guide.**		
Price Order	Press this button if whole order discount needs to be applied. The discount will either be applied to each order detail line or a separate discount total is displayed depending on the applications control settings (*See FLEXX Implementation Guide)*		
Refund	Press this button to bring up the return order form. Individual SKU's can be refunded including the quantity and edition.		
Notes	This button displays the Contact Manager Maintenance form so existing notes can be reviewed and new ones added. See Contact Management manual for more details.		

3.3   Order Generation from Subscription

Description   Once the Subscription has been Invoiced (Invoice button on Bill Account) or Paid (Payment button on Pre-Paid), the subscription Sales Order can be created pressing the Generating Initial Order button, or if to be run in a batch, selecting the Order Generation from Subscription menu function. An order cannot be generated before either Invoicing or Paying the subscription.

Running this will result in an order being created in Order Processing. It will be marked Pre-paid and invoiced and will have the source (on the summary form) marked as subscriptions with the subscription number record in the document field. The resulting order can now be handled as any other regular sales order.

Select

Subscriptions Menu	→ Subscription Entry/Main	→ <<Find>> Desired Subscription and press Generate Initial Order

OR

Subscriptions Menu	→ Order Gen. From Subscriptions.

Fields

The following fields appear in add/update mode.

Fields	Entry	Default	Reqd
Company	The Company code.	Session Default	Y
Division	The default division code.	Session Default	Y
Subscription Number	The subscription for which an order is to be generated; leave wildcard to select all subscriptions within the other selection criteria.	*	Y
Customer	Enter a specific customer to generate all of one customer's subscriptions or leave wildcard to select all customers.	*	Y
SKU Code	Enter a SKU part number to generate orders for all subscriptions ordering that part number. Leave wildcard to select all SKU's	*	Y
SKU Cycle	Enter a SKU Cycle code as defined in SKU User Attribute 5 field. Leave wildcard to select all cycle groups.	*	Y
Generation Date	The date the orders are generated.	Session Default	Y
Warehouse	The warehouse that the orders are to be generated for. This will default to the warehouse defined as the default on the Company/Division Table but can be changed to any valid warehouse value.		Y
Start	Press start to begin the Order Generation from Subscriptions.		

3.4   Subscription Renew Process

Description   The Subscription Renew Process is used to generate renewal subscription orders. This process will review the current active subscription list for detail items about to expire, and will then create a new subscription order with detail items to be renewed for each customer.

The process can be run against a specific customer code, SKU code, and/or the subscription detail expiry date range. Any detail items which already have a renewal order generated will be skipped.

To review which subscriptions are about to expire, run the **Subscription Detail Summary** process (Subscription menu item) and perform a FIND by expiry date range. This will also show all subscriptions that already have a renewal subscription order generated *(see sec. 3.5)*.

Select
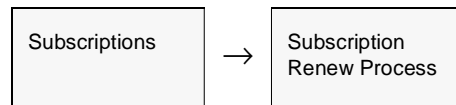
Fields

The following fields appear in add/update on the form.

Fields	Entry	Default	Reqd
Company	The Company Code	Session Default	Y
Division	The default division code. Use Zoom to select from a list of divisions.	Set by System Administrator	Y
Salesperson	The salesperson code entering the record		
Customer	Use a specific customer or leave wildcard to select all customers.	*	Y
SKU Code	Use a specific SKU code to renew all subscriptions of a certain part number or leave wildcard to select all SKU codes		
Expiry Date Ranges	A range of dates for subscriptions expiry dates. Subscriptions will be renewed for expiry dates that fall within these two dates.		Y
Start	Press start to begin the subscription renew process.		

3.5   *Subscription Detail Summary*

Description   The Subscription Detail Summary is used to review all subscriptions, or specific subscriptions according to the data entered and using the Find Button.

This form also allows subscriptions to be suspended and re-activated as needed.

This form is primarily a view only form. No changes can be made to any field other than the status field of 'a' active to 's' suspended and visa versa and the text field for unlimited text for this subscription detail line.

Select

```
┌─────────────────┐        ┌─────────────────┐
│  Subscriptions  │   →    │  Subscription   │
│                 │        │  Detail Summary │
└─────────────────┘        └─────────────────┘
```
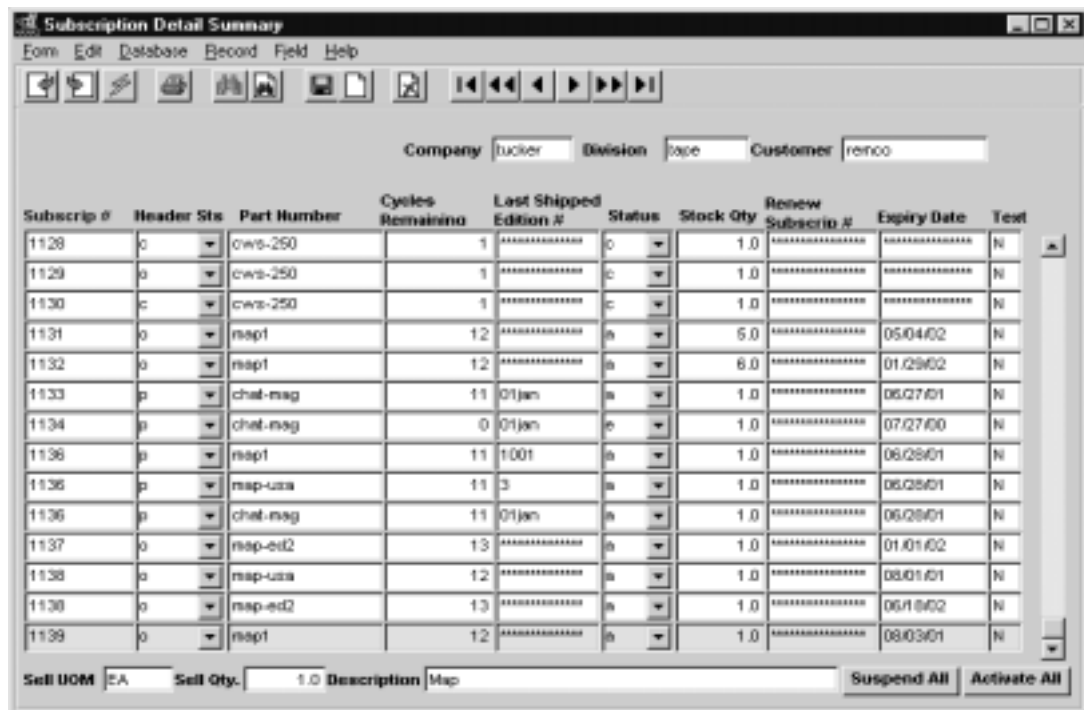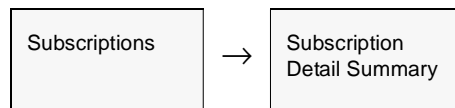
Fields

The following fields appear in find mode.

Field	Entry	Default	Reqd
Company	The Company code	Session Default	Y
Division	The division code	Session Default	Y
Customer	Enter a specific customer to find their subscription details or leave blank to view all customers		N
Subscription Number	The subscription number you wish to view leave blank to view all subscriptions.		N
Header Status	The status of the subscription on the header.		N
Part Number	The SKU part number as ordered in the subscription		N
Cycles Remaining	The remaining cycles left of the SKU Edition in the subscription.		N
Last Shipped Edition #	The last edition number shipped to the customer.		N
Status	The status of the subscription. This is the only field that can be modified on this table. Status can be changed from 'a' active to 's' suspended and 's' suspended back to 'a' active. Can be changed manually line by line or press the buttons at the bottom to change all subscriptions viewed on the form.		
Quantity	The quantity the part number ordered		N
Renew. Subsc. #	If the subscription has been renewed the resulting subscription number.		N
Expiry Date	The expiry date of this subscription number		N
Text	If there is text for the subscription detail it may be viewed by zooming on this field. Additional text for this detail line may also be entered here.		N
Sell UOM	The Unit of Measure the item was sold in		Y
Sell Qty.	The quantity of the SKU ordered		
Description	The description of the Part Number from the SKU master.		N
Suspend All Button	Pressing this button suspends all 'a' active subscription detail lines from all subscriptions that are currently displayed on the form.		N
Activate All Button	Pressing this button activates all 's' suspend subscription detail lines of all subscriptions currently displayed on the form.		N

Enter the search parameters desired to find (e.g. subscription #, customer, part number, or any other combinations). Press <<FIND>> and FLEXX will display the results.   The results on the form can be sorted many ways. Click on each heading to sort by subscription number, part number, cycles remaining, expiry date etc.

4.0   Subscription Management Menu

4.1   Purge Subscriptions Process

Description   The Purge Subscriptions Process will allow the user to purge or completely delete all subscriptions that are open (o or unpaid) up to the specified cutoff date. **Only Open subscriptions can be purged**.

Select
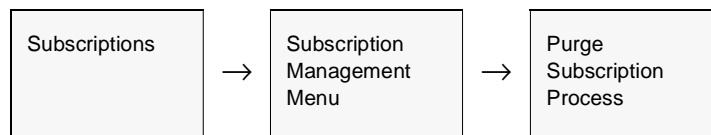
Subscriptions		Subscription Management Menu		Purge Subscription Process
	→		→	

Fields   The following fields appear in add/update mode.

Fields	Entry	Default	Reqd
Company	The company code	Session Default	Y
Subscription Number	Enter a subscription number if there is a specific one to be purged or leave wildcard to purge all open orders up to the cut off date	*	Y
Cut Off Date	The Cut Off Date of the subscriptions you wish to purge. Only subscriptions with this date or earlier will be deleted.	Session Default	Y
Start	Press the start button to begin the Purge Subscription Process.		

5.0 Extracting Subscription Information

Description   This section describes how to print standard subscription reports. The kind of reports you can generate depends on which ones your company has set up in the system.

The following table lists the standard subscription reports:

Report Code	Report Title	Description
subdaily	Subscription Daily Orders Report	Shows an order report that displays all the detail of the subscriptions within a given date range.
subnewad	Subscription New Address Report	This report will take a date range for subscriptions and display customer name and address within those selected dates.
suborder	Subscriptions Order Report	Shows detail of all subscriptions. Allows selection by customer, customer type, date range and remaining cycles limit. Only active, paid subscriptions.
subscrip	Subscriptions Report	Shows details of subscriptions for all status within a specified date range.
suspsubs	Suspended Subscription Report	Shows a current list of subscriptions marked as suspended.

Procedure   **To print Subscription reports;**

1. Select **Report Selection** from the Subscriptions menu.

2. Position your cursor on the report you want to print.

3. <<Press Select Report>>. The report selection criteria appears along with the report title and control number.

4. Enter the selection criteria. The following table indicates which fields you must enter criteria in to select the report.

5. <<Press Run Report>> to display the following printing options.

Fields   Enter the following information to print the report.

Field	Entry	Default	Reqd
Print	Select the print box to send the report output to a printer.		Y
Print Device	The printer name. This will be the printer specified as the Default on the User Master for this user.	default	Y
# Copies	Enter the number of copies of the report desired.	1	Y
Fax	Select the fax box to fax the report. This functionality only works if fax software has been installed and configured to FLEXX specifications.		Y
Fax Number	Enter the fax telephone number.		Y
File	Select the file box to send the report output to a file, otherwise leave blank. This file can be used to reprint the report at any time.		Y
File Name	The user-defined name of the file to send the output to. Your System Administrator sets up this field.	System Generated	
Mail	Select the Mail box to have the report server send you an e-mail on print completion. This functionality only works when reports are being "scheduled".	User Master	N
Mail Address	The e-mail address to be used.	User Master	
Attach report to email	Select this box to have the report "rox" file sent to the designated e-mail address as an attachment. If Actuate is loaded the report can then be viewed or printed.		

Field	Entry	Default	Reqd
The following fields are only active (lit) if the FLEXX Report Server is installed and active.			
Start Date	The date to start the printing schedule for this report.	Session Default	Y
End Date	The date when the print schedule is to end.	Session Default	Y
Run Time	The time of day when the print schedule is to be started.	Internal Time Clock	Y
Priority	The scheduling priority. Once the report scheduler has determined which reports are eligible to be run for the specified date or time, they are then prioritized with 1000 being the highest and 0 the lowest priority.	1	
Schedule Type	The type of schedule to use; can be: • At Once – to be run immediately. This is the only option for Preview or Run Local. • Run Once – run only once (no repeats). • Daily – run schedule each day for the period entered. • Weekly – run the schedule once a week. • Monthly – run the schedule once a month	At Once	
Day of Week	The day of the week the report is to be scheduled.	Session Default	
Day of Month	The month date the report is to be scheduled. Note that when defining the Day of Week or Day of Month settings, only one or the other can be set. FLEXX will enter the other corresponding value to match.	Session Default	
Status		s	
Print Parameters Page	Select this box to have a cover sheet printed with the report, displaying the selection criteria used to produce the report. This can be controlled with the Application Control variable *parampage* setting.	marked	
Buttons			
Run Remote	Press this button to send the report to the Report Scheduler to be printed.		
Preview	Press this button to preview the report only. It can be printed from the preview screen.		
Run Local	Press this button to print the report on the local printer (i.e. not schedule the printing)		
Cancel	Press Cancel to cancel the operation. This is the same as pressing <<Previous Form>>. It will not cancel printing if the report has already been sent to the printer or scheduler.		