

Oracle Subscription Management

Subscription Management Questions and Answers

Oracle Subscription Management
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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 Subscription Management Questions and Answers

What can I use the Security Console for?

Use the Security Console work area to perform most security-management tasks.

Security Console Tasks

You can do these tasks on the Security Console:

- Review role hierarchies and role analytics.
- Create and manage custom job, abstract, and duty roles.
- Review the roles assigned to users.

Note: You use the Manage Users work area, not the Security Console, to create users and to provision users with roles.

- Compare roles.
- Simulate the Navigator for a user or role.
- Manage the default format of user names and the enterprise password policy.
- Manage notifications for user-lifecycle events, such as password expiration.
- Manage PGP and X.509 certificates for data encryption and decryption.

Note: Oracle Sales and Fusion Service don't use certificate functionality.

- Set up federation and sync user and role information between Oracle Applications Security and Microsoft Active Directory, if appropriate.

Security Console Access

You must have the IT Security Manager job role to use the Security Console. You open the Security Console by clicking the **Security Console** link within the **Tools** menu in the Navigator. These tasks, performed in the Setup and Maintenance work area, also open the Security Console:

- Manage Job Roles
- Manage Duties
- Manage Data Security Policies

You may also be interested in reviewing the article, [How to Audit Security Customization \(Role Creation, Role Modification, Role Membership, Entitlement/ Privilege Changes\) in Fusion Application \(Doc ID 2175861.1\)](#), on My Oracle Support.

What makes up a subscription?

Subscriptions consists of the several aspects, each of which has subpages.

The subpages are: Summary, Parties, Team, Renewal Controls, and Sales Credits.

Summary Page

The Summary page regions are:

- **Overview:** The Overview section comes prepopulated with information from the Create Subscription page. Additionally, you can add subscription contracts and other supporting documents.
- **Products:** The Products region displays a list of the products available or added to the subscription. Add products to the subscription using the Products section. You can add two types of products: subscription products and coverage products with covered levels. Covered levels can be of type asset, product, party, customer account, party site, asset group, and product group. Assets can be specific serialized or non-serialized assets. For a serialized asset, such as a laptop or a printer, the asset is always an individual product.
- **Tax Control:** The Tax Control region displays tax classification code and tax exemption related information. The Tax Control field becomes read-only when a subscription is in active status.

Note: The Estimated Tax number field is a calculated value that's populated from Accounts Receivable. It's always recalculated based on certain factors and you can't populate it manually, like, for example, through import. Additionally, the Estimated Tax field isn't exposed automatically. You need to enable it using Application Composer.

Parties Page

The Parties page shows your customer and contact information. You can add and remove additional parties and contacts here. By default, the application shows primary party details that were added during subscription creation. You can't edit or delete the primary party.

You can replace the duplicate parties and related entities by merging them with the new party and consolidate all the subscriptions under one party for the ease of tracking. When you merge parties and related entities, such as accounts and sites in Oracle Customer Data Management, the application updates the corresponding subscriptions to reflect the merge results. The application replaces the acquired or duplicate parties and its related entities in a subscription with the new party and its entities. You need the Oracle Customer Data Management license to merge parties.

Here are the fields within Subscription Management that are updated after the parties and related entities merge:

Subscription Summary Tab

- Customer
- Billing Account
- Bill-to Site

Product Summary Tab

- Billing Account

- Bill-to Site
- Ship-to Party
- Ship-to Site

Parties Tab

- Name

Renewal Controls Tab

- Organization Name

Default Coverage Tab

- Default Level Value

Oracle Revenue Management, Oracle Pricing, and Oracle Tax don't support party merge. Therefore, here are the entities that aren't updated after the party merge:

- Tax exemption certificates
- Revenue contracts
- Pricing qualifiers
- Customer profiles
- Dynamic matrix

Team Page

The Team page displays details of the subscription owner and all the team members who are associated with the subscription. Additionally, you can add and delete team members.

Renewal Controls Page

The Renewal Controls page includes:

- **Negotiation Settings:** Use the Negotiation Settings region to override subscription profile details for a specific subscription.
- **Quote to Contact:** Use the Quote to Contact region to define the intended recipients who receive the quote notification emails, salespeople who are involved in the negotiation, and other parties who receive quotes and renewal reminder notifications.
- **Next Renewal:** Use the Next Renewal settings region to define attributes that include Renewal Process, Customer Acceptance, Internal Approval, and Price Adjustment Type. These override the renewal rules template attribute values.

Sales Credits Page

You can enter sales credits for each salesperson. You can add and delete sales credits at the subscription header level and at the product level. Subscriptions support quota and non-quota types of sales credits.

How do I analyze subscription trend reports?

Using the Oracle Business Intelligence (BI) and Oracle Transactional Business Intelligence (OTBI) subject areas, Subscription Management lets you report on key subscription metrics based on aggregated data.

You can analyze key subscription metrics by subscription product or customer. And, you can aggregate the subscription data based on the monthly, quarterly, and yearly periods.

Predefined Dashboards

Subscription Management comes with several predefined dashboards. The dashboards consist of prebuilt reports that you can use to analyze your subscription data.

The predefined dashboards are:

- **Subscriptions Overview Dashboard**

A dashboard to analyze your subscription data across all customers and products.

- **Customer Dashboard**

A dashboard to analyze subscription data for one or more customers.

- **Product Dashboard**

A dashboard to analyze subscription data for one or more subscription products.

- **Cohort Retention Dashboard**

A dashboard to track monthly recurring revenue (MRR), total contract value (TCV), and the number of customers for a given cohort across time. A cohort is a distinct group of customers with active subscriptions at the start of a period.

Predefined Subject Areas for Coverage Services

Subject areas let you report on various aspects of your coverage subscriptions:

- **Subscription Management - Covered Levels Real Time Subject Area:** You can analyze various covered levels by customer, product, status, and various dates.
- **Subscription Management - Coverage Entitlements and Adjustments Real Time:** You can analyze coverage templates based on various entitlements and adjustments.
- **Subscription Management - Subscription Billing Real Time:** You can analyze billing lines for covered levels by customer, product, status, and various dates.

Additional Dashboards

Additionally, you can use these supplied dashboards. They can be found in /shared/Subscription Management/Embedded Content/Subscription Specialist/ in your Oracle Transaction Business Intelligence Catalog.

- **Coverage Products Dashboard:** You can view the list of coverage products and covered levels by searching for various fields like customer, business unit, dates etc. You can view coverage products and covered levels are about to expire and which ones have been terminated
- **Subscriptions by Entitlements and Adjustments:** You can view the list of coverage subscriptions that are covered by specific entitlements and adjustments, for example you can view a list of coverage subscriptions that have a coverage that provides 10% discount for labor.

Subscription Metrics in Prebuilt Reports

This table lists available subscription metrics in the prebuilt reports, with a description of how each subscription metric is calculated. A period can be either a month, a quarter, or a year.

For the current period, the metric is calculated as the day when the incremental scheduled process is run. For previous periods, the metric is calculated on the last day of the period.

Subscription Metrics	Calculation Method
Number of Active Customers	The total number of customers with an active subscription at the start or end of a period.
MRR	The total monthly recurring revenue of all active subscriptions at the start or end of a period.
TCV	The sum of the total contract value of all active subscriptions at the start or end of a period.
Average Revenue per Customer	The total MRR divided by the total number of active customers at the start or end of a period.
Net Revenue Retention	The total MRR at the end of a period divided by the total MRR at the start of that period.
Number of Subscriptions	The total number of active subscriptions at the start or end of a period.
Number of New Customers	The total number of new customers who started an active subscription in a period.
New MRR	The total MRR of active subscriptions that started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions.
Number of New Subscriptions	The total number of active subscriptions that started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions.
Discount	The sum of discounts applied in a period across all active subscriptions. The discount for a subscription is calculated by summing up the difference between the list price and the net price of bill lines for a period (when the list price is higher).
Termination MRR	The total MRR of active subscriptions that are closed in a period. This metric doesn't include closed subscriptions due to the amendment or suspension of existing subscriptions.

Subscription Metrics	Calculation Method
Number of Terminated subscriptions	The total number of active subscriptions that are terminated in a period. This metric doesn't include closed subscriptions due to the amendment or suspension of existing subscriptions.
MRR due for Renewal	The total MRR of active subscriptions ending in a period.
Activated Renewal MRR	The total MRR of active subscriptions that are renewed from existing subscriptions and started in a specific period.
Number of Renewed Subscriptions	The total number of active subscriptions that are renewed from existing subscriptions and started in a specific period.
Lapsed Renewal MRR	The total MRR of active subscriptions that expired in a period without being renewed.
Churned Renewal MRR	The total MRR of subscriptions that are renewed from existing subscriptions but canceled in a specific period.
Expansion MRR	The total increase in MRR due to active subscriptions that were amended in a period.
Contraction MRR	The total decrease in MRR due to active subscriptions that were amended in a period.
Number of New Customers	The number of customers who started an active subscription in a period. A customer without any active subscriptions in the prior periods.
Number of Churned Customers	The number of customers whose active subscriptions were either terminated or expired without renewal.
Number of Reactivated Customers	The number of previously churned customers who started another active subscription.
Reactivation MRR	The total MRR of active subscriptions that belong to reactivated customers in a period.
Absolute Revenue Churn	The sum of termination MRR, lapsed renewal MRR, and churned Renewal MRR in a period.
MRR Churn Rate	The absolute revenue churn in a period divided by the MRR at the beginning of a period.
Customer Churn Rate	The number of churned customers in a period divided by the number of active customers at the beginning of the period.
MRR Renewal Rate	The activated renewal MRR divided by the MRR due for renewal in a period.

You can also access additional metrics that enable you to report on the period-over-period increase or decrease in metrics like the number of active customers, average revenue per customer, and so on.

Subscription Scheduled Processes for Reports

Run these scheduled processes to refresh report data:

- Aggregate Historical Subscriptions Data for Reporting
- Aggregate Incremental Subscriptions Data for Reporting

Find Logic for Field Calculations

To find the logic for a field calculation:

1. Navigate to and edit the dashboard.
2. Click on the **Criteria** tab.
3. Click on the gear icon in the relevant column name.
4. Select edit option on the formula.

For more information about how to use analytics, see the *Creating and Administering Analytics* guide.

How do I enable Subscription 360 in accounts?

The Subscriptions subtab in the sales Accounts details page, also known as Subscription 360, summarizes information about subscriptions owned by a customer.

Salespeople can use the Subscription 360 page to see active subscriptions, draft subscriptions, subscriptions about to expire, and monthly recurring revenue of active subscriptions. Salespeople can also use it to create and manage subscriptions and review key metrics. The Subscription 360 task flow can be embedded in Account, Contact, or Household objects.

Note: Subscription 360 is only available in the Account details page.

To enable the Subscriptions subtab in the Account details page:

1. Sign in to the application as a setup user.
2. Ensure that you're working in an active sandbox.
3. Navigate to **Application Composer** in the **Configuration** category.
4. In the navigation tree, expand **Standard Objects**, expand **Account**, and click **Pages**.
5. Ensure that the Simplified Pages tab is selected.
6. In the **Details Page Layout** section, duplicate the Standard layout.
7. Enter a new layout name, and click **Save and Edit**.

The Details Layout page appears.

8. Click **Add** in the Subtabs region.

The Create Subtab page appears.

9. Select **Mashup Content** and click **Next**.

The Select Mashup Content page appears.

10. Click **Task Flows**.
11. Select **Subscriptions** and click **Insert**.

The Task Flows page appears.

12. Enter **Subscriptions** as the **Display Label**.

This subtab appears on the Account details page.

13. Click the default image and select an appropriate image to change the default image on the subtab.
14. Select **Registry ID** as the **Party Number**.
15. Click **Save and Close**.
16. On the Details Layout page, click **Done**.
17. Ensure that the layout status for your new layout is **Active**.
18. As a salesperson or sales manager, navigate to **Sales > Accounts** to test the changes. Verify that you can see the Subscriptions subtab on the Edit Account page.
19. Publish the sandbox according to your company's business practices.

Configure the Subscriptions Role for Salespeople

Salespeople working with accounts might not have access to the Subscriptions page. In such a scenario, even if they can see Subscription subtab, also known as Subscription 360, on the Accounts page, they can't view, create, or edit subscriptions.

To enable Subscriptions 360 for salespeople:

1. Sign in to the application as an administrator with the IT Security Manager (`ORA_FND_IT_SECURITY_MANAGER_JOB`) role.
2. Click **Navigator > Security Console**.
3. Search for the role to which you want to grant Subscription Management permissions.
4. On the Function Security page, click **Add Function Security Policy**.
5. In the Add Function Security Policy dialog box, search for the **View Subscriptions for an Account** privilege.
6. Click **Add Privilege to Role**.
7. Click **Next** to go to the Data Security Policy page.
8. Click **Create Data Security Policy**.
9. In the Create Data Security Policy dialog box:
 - a. Enter the policy name, for example, Grant on Subscription.
 - b. Select **Subscription** as the Database Resource.
 - c. Enter start and end dates.
 - d. Select the appropriate data set.
 - e. Select all the available actions to grant complete access to subscription.
 - f. Click **OK**.
10. Click **Next** to go to the Role Hierarchy page.
11. Click **Add Role** and add these duty roles:
 - o Subscription Amendment External
 - o Subscription Authoring External
 - o Subscription Search and View Access External
12. Verify the summary information and click **Submit and Close**.

What's the subscription lifecycle?

Each subscription typically moves through certain predefined statuses as part of its lifecycle.

Here are the predefined statuses:

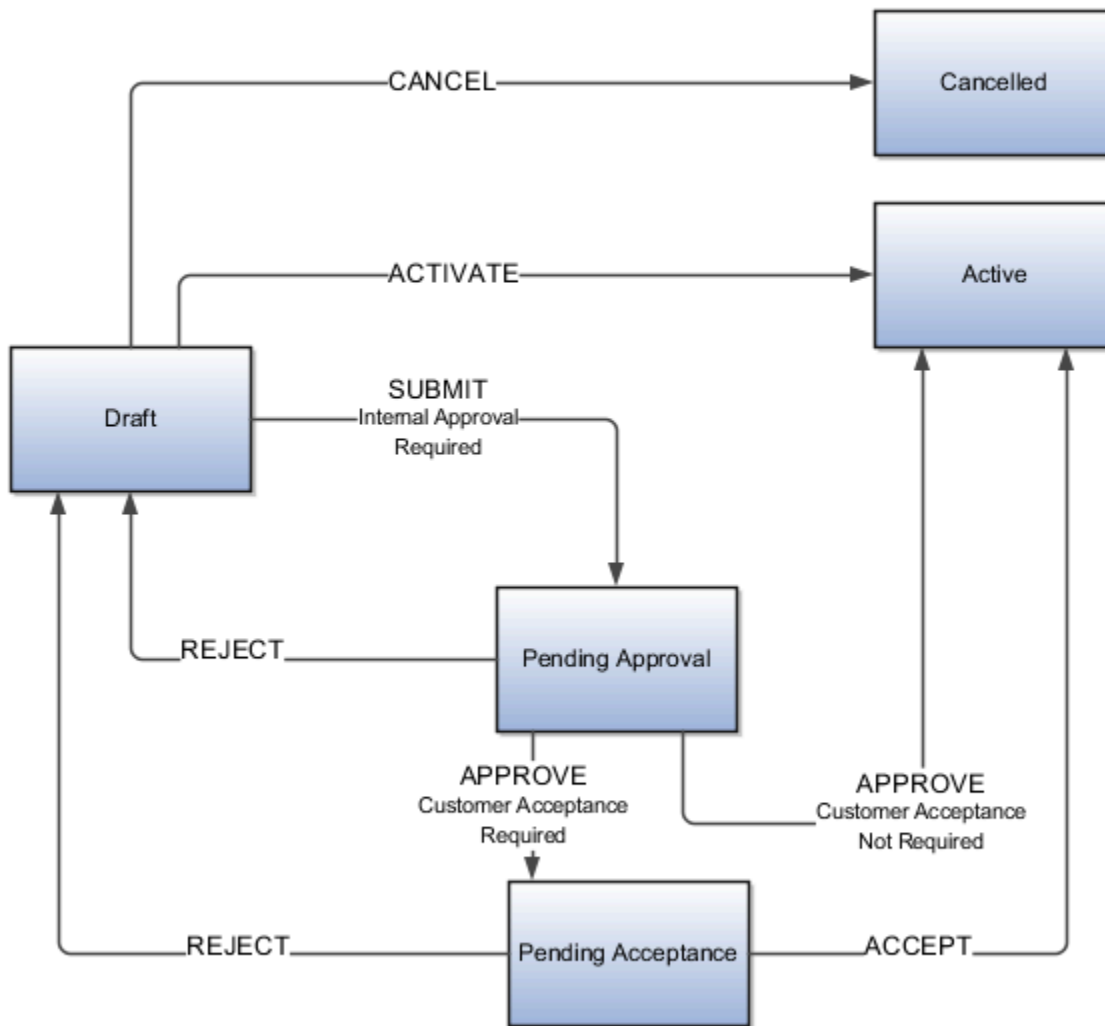
- **Draft:** The initial status of the subscription.
- **Pending Approval:** When you submit a subscription for internal approval, its status changes to Pending Approval.
- **Active:** When you approve a subscription, its status changes to Active.
- **Under Amendment:** When you amend a subscription line, its status changes to Under Amendment.
- **Expired:** When a subscription reaches its end date, the status of the subscription changes to Expired.

Note: Subscription statuses are predefined and you can't define new statuses. However, you can define user statuses and their transitions and use them.

The actions you can take on a subscription during each of its statuses are determined by status rules. For example, you can't edit some fields in the UI for certain statuses. And, for example, the Tax Control field becomes read-only when a subscription is in active status.

In addition, when a subscription moves out of a status, the resulting status follows rules.

This chart shows how a subscription moves through its lifecycle, from its creation to its approval. A new subscription is created in the Draft status. Then, depending on different actions, some manual and some through workflow, the subscription goes through different lifecycle statuses.



Actions for Draft Subscriptions

Here are the different actions you can perform on a subscription and its lines when the subscription is in Draft status:

Subscription Action	Resulting Subscription Status	Subscription Line Action	Resulting Subscription Line Status
Activate	Active	Add subscription line	Draft
Preview	No change	Update subscription line	Draft

Subscription Action	Resulting Subscription Status	Subscription Line Action	Resulting Subscription Line Status
Reprice	No change	Reprice line	Draft
Regenerate Billing Schedule	No change	Regenerate Billing Schedule	Draft
Cancel	Canceled	Cancel	Canceled

Actions for Subscriptions Under Amendment

Here are the different actions you can perform on a subscription and its lines when the subscription is in the Under Amendment status.

Subscription Action	Resulting Subscription Status	Subscription Line Action	Resulting Subscription Line Status
Activate	Active	Add subscription line	Draft
Email	No change	Amend subscription line (only if the line is active)	Under amendment
Preview	No change	Delete subscription line (only if the line is draft)	NA
Validate	No change	Reprice line (only if the line is draft)	Draft
Validate	No change	Regenerate billing schedule (only if the line is draft)	Draft
Validate	No change	Cancel (only if the line is draft)	Canceled
Validate	No Change	Close (only if the line is active or expired)	Closed

Actions for Subscriptions Pending Approval

Here are the different actions you can perform on a subscription and its lines when the subscription is in the Pending Approval status.

Subscription Action	Resulting Subscription Status	Subscription Line Action	Resulting Subscription Line Status
Withdraw	Under amendment (if the previous state was under amendment)	NA	NA

Subscription Action	Resulting Subscription Status	Subscription Line Action	Resulting Subscription Line Status
Withdraw	Draft (if the previous state was draft)	NA	NA
Email	No change	NA	NA
Preview	No change	NA	NA

Actions for Active Subscriptions

Here are the different actions you can perform on a subscription and its lines when the subscription is in the Active status.

Subscription Action	Resulting Subscription Status	Subscription Line Action	Resulting Subscription Line Status
Renew	Active	Add subscription line	Draft
Close	Closed	Close subscription line (only if the line is active or expired)	Closed
Email	Active	Amend subscription line (only if the line is active)	Under amendment
Preview	Active	NA	NA
Validate	Active	NA	NA

Actions for Expired Subscriptions

Here are the different actions you can perform on a subscription and its lines when the subscription is in the Expired status.

Subscription Action	Resulting Subscription Status	Subscription Line Action	Resulting Subscription Line Status
Renew	Expired	Add subscription line	Draft
Close	Closed	Close subscription line (only if the line is active)	Closed
Email	Expired	Amend subscription (only if the line is active)	Under amendment

Subscription Action	Resulting Subscription Status	Subscription Line Action	Resulting Subscription Line Status
Preview	Expired	NA	NA
Validate	Expired	NA	NA

Note: The only action available for a closed subscription is to duplicate it.

Can I use multiple currencies in subscriptions?

Yes, as long as the proper setup steps have been done. Oracle Subscription Management uses the currency that corresponds to the pricing strategy and price list associated with the customer.

If you try to create a subscription with a currency that doesn't match with the pricing strategy and price list associated with the customer, the subscription is created, but you may receive an error about the attribute currency in the view object PricingSubscriptions. This error can occur when you try to add a product line or perform a reprice.

To set up multiple currencies for subscriptions, refer to the related information.

Related Topics

How do I amend subscriptions?

You can use the Amend action to update several aspects of an active subscription. Among the tasks, you can amend subscription products and coverage products in active or expired status.

You can use the amend feature to:

- Upgrade or downgrade subscription products
- Change products
- Change subscription quantity
- Change terms
- Change billing address
- Copy custom child objects
- Manage charges

Here are the actions that don't create a new line when you amend a product:

- Change payment method
- Change billing owner or customer contact
- Change tax control
- Change renewal options

Note: When you delete an Under Amendment coverage product line, the original product and the subscription move back to the Active status.

To amend a product:

1. Select the product to go to the Edit Product page.
2. Click **Actions > Amend**.
3. Edit the line number, effective date, amendment reason, amendment description, and credit method.
4. From charges options, you can select these options to manage charges for an amended subscription:
 - o Copy custom child objects
 - o Don't copy charges and adjustments
 - o Copy charges:
 - Include adjustments
 - Include one-time charges
5. Click **Save and Continue**.

Note: If you want to copy charges but don't select the **Include adjustments** check box, any original adjustments, including discounts from the source line, aren't carried forward to the target line.

Here's what happens next:

- The application creates a new draft product line for the amended product line.
- The application takes to you summary page of the new product. You can select a new product or retain the existing product.
- The pricing details aren't defaulted from the source product, so you need to manually reprice the new draft product.
- After you have repriced, the application generates the pricing and billing schedules. The start date of the new product is the amendment effective date, and the end date syncs with the subscription header end date and term.
- Activate the subscription after you have reviewed all the changes.

When you activate the subscription, the application:

- Terminates the current product line and activates the new product.
- Generates the credit memo records for the source products, based on the amendment effective date and amendment credit method.
- Moves the source product to a closed status and stops all future-dated billing schedules from the source product billing summary.

The Relationship subtab displays the Amended From and Amended To details on the new product line and old product line, respectively. You can drill down to the source line detail page. All fields on this page are read-only.

To revert an amendment you can delete the new line in draft status. After you delete the draft product, the other product that was under amendment becomes active again.

Here are a couple of scenarios that describe the lifecycle statuses of the current and new coverage product lines.

Amendment Effective Date	Current Line	New Line
Past Date/System Date	<ol style="list-style-type: none"> Under Amendment status, when the amendment is saved Pending Approval status, when the subscription is sent for approval Terminated status, when the amendment is approved <p>Under Amendment status, when the amendment is rejected</p>	<ol style="list-style-type: none"> Draft status, initially Pending Approval status, when the subscription is sent for approval Active status, when the amendment is approved
Future Date	<ol style="list-style-type: none"> Under Amendment status, initially Pending Approval status, when the subscription is sent for approval Terminated status, when the amendment is approved <p>Under Amendment status, when the amendment is rejected</p> <p>The line exists independently, in Active status, until the amendment effective date. On the amendment effective date, the line moves to Terminated status.</p>	<ol style="list-style-type: none"> Draft status, initially Active status, when the amendment is approved

Related Topics

- [Subscription Amendments](#)
- [Subscription Termination](#)
- [Create and Manage Subscription Event Notification Rules and Template Sets](#)
- [Enable Revenue Management Rules](#)

Why is the subscription header closed but the lines are still active?

That's because you can mark certain lines of a subscription to close in the future. The lines remain open while the header can be closed by the user.

Let's look at an example:

A subscription exists with these dates: 01-Jan-2023 to 31-Dec-2023

The subscription has 100 lines -- L1 to L100.

You want to close line L100 on 1-DEC-2023 (in this example it's a future date) and close all other 99 lines on, say, 31-JAN-2023 (a past date in this example).

You can future-close L100 with a close date of 1-DEC-2023. The status of line L100 status will still be active, since it's future-closed.

Now you can close the header with a close date of 31-JAN-2023 (a past date). This sets not only the header status as closed, it also sets a closed status for lines L1 to L99.

Because the subscription header is just used for defaulting, and all executions happen at the product level, this scenario works fine. This means, however, that in this case, you should do any reporting at the product line level instead of at the header level.

How do I use custom covered levels?

You can use custom covered levels to define coverages for custom entities beyond the predefined covered levels.

1. Open a subscription.
2. Click on a product that has a covered level.
3. Click the **Covered Level** tab.
4. Click **Add Covered Level**.
5. In the Covered Level Type field, select **Custom**.

How do I make internal approval not required?

Here's how to make internal approval default to Not Required in Subscription negotiation settings:

1. Enter a sandbox and navigate to the Subscription Configuration work area.
2. Under Subscription State Management, click Event Models.
3. Click the Subscriptions event model.
4. Under States, click the DRAFT state.
5. For the Entry event, add this line to Groovy script: before the createHistory line: `InternalApproval = 'NOTREQUIRED';`

How do I avoid subscription numbering skipping large numbers?

Set up document sequencing as gapless.

Gapless sequencing is similar to automatic sequencing. It automatically generates a unique number for each document, but does that only for successfully generated documents. Sequence numbers aren't assigned to incomplete or failed documents. As a result, the sequence is maintained for all the successfully generated documents.

Additionally, you can control the gapless document sequencing by enforcing the Transaction Date Validation option. When enabled, this option checks for the transaction date of a particular document and assigns the sequence number accordingly, to chronologically maintain the documents. The sequence numbers and the transaction dates are chronologically correlated to prevent any mismatch of a new document sequence assigned to an older document or an older document sequence assigned to a new document.

Note: Use this type of sequencing only if necessary because it might affect the performance of the application and slow down transaction processing.

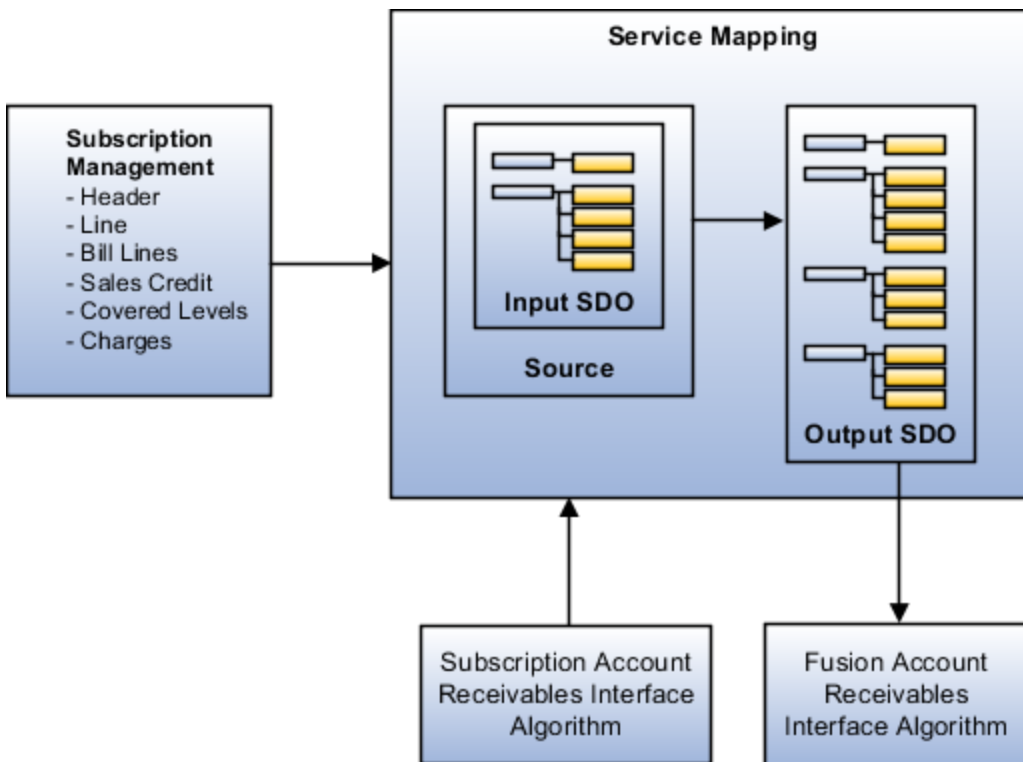
How do I manage Accounts Receivable service mappings?

You can use the Accounts Receivable service mapping to model entities and attributes in a declarative environment. The service mapping creates relationships between services, sources, entities, and attributes. It specifies a group of entities and attributes that a service can retrieve and update.

The Subscription AR Integration service mapping provides a flexible mechanism to map subscription attributes and custom attributes to Accounts Receivable interface tables. The additional attributes are used for downstream invoice grouping, invoice printing, reporting, and so on.

The Subscription AR Integration supplied mapping is created between the Subscription Management and Accounts Receivable invoice interface. The integration supports mapping at the invoice header and invoice line level. The Subscription AR Integration mapping sends eligible subscription billing information to Accounts Receivable. As an administrator, you can modify this supplied mapping, create additional entity attributes, and define transformation logic for the attributes.

Here's a graphic that shows how a typical Subscription AR Integration service mapping is processed:



Set Up the Subscription AR Integration Service Mapping

Here are the high-level steps to set up the Subscription AR Integration Service Mapping:

1. Create AR Descriptive Flexfields at the line and header level. See the sections after this one for details.
2. Create and activate a sandbox. In this sandbox, create the required custom attributes (Subscription, Subscription Product, Covered Level, and so on) at different levels using Application Composer. Duplicate standard details layout, pull in required custom attributes, and publish the sandbox.

Note: You must ensure that the custom attribute data type matches with the Service Mapping attribute data type.

3. Create the Service Mapping with the required attributes
4. Edit and publish the algorithm.
5. Create a subscription. Enter the required details to verify custom attribute data and activate the subscription.
6. Run the Send Subscription Information to Receivables scheduled process job.
7. Connect to the database and verify database details for custom attributes using:

```
SELECT * FROM fusion.RA_INTERFACE_LINES_ALL where interface_line_attribute1=<subscription number>;
```

Confirm that the custom attribute values passed in the subscription are displayed against the corresponding columns in the Accounts Receivable interface tables.

Create AR Transaction Line Descriptive Flexfields

Here are the steps for creating the line-level descriptive flexfields:

1. In the Setup and Maintenance work area, go to the Manage Descriptive Flexfields task.
2. Enter RA_CUSTOMER_TRX_LINES in **Flexfield Code** and click **Search**.
3. Select the Invoice Lines record from search results and click **Edit**.
4. Click **Create** to create a new global segment record and enter the required details.

Note: From the Column Assignment section, note the value selected in the **Table Column** field on the Create Segment page. This value is later used in the algorithm and the same column value is queried in the database for the mapped value.

5. Click **Save and Close**.
6. Click **Deploy Flexfield**.
7. Click **OK**.

Create AR Transaction Header Descriptive Flexfields

Here are the steps for creating the header level descriptive flexfields:

1. In the Setup and Maintenance work area, go to the Manage Descriptive Flexfields task.
2. Enter RA_CUSTOMER_TRX in Flexfield Code and click **Search**.
3. Select the Invoice Lines record from search results and click **Edit**.
4. Click **Create** to create a new global segment record and enter the required details.

Note: From the Column Assignment section, note the value selected in the **Table Column** field on the Create Segment page. This value is used in the algorithm and the same column value is queried in the database for the mapped value.

5. Click **Save and Close**.
6. Click **Deploy Flexfield**.
7. Click **OK** once the deployment process is complete.

Configure Service Mappings

Here are the steps for configuring the subscription service mappings:

1. Sign in as a setup user.
2. Go to the Subscription Management work area.
3. On the Subscriptions landing page, click the **Subscription Configuration** tab.
4. Click **Manage Service Mappings**.
5. Click **Subscription AR Integration**.
6. From the **Entity** tab, select an entity .
7. Click **Add Row** in the Details section to create custom entity attributes to map the custom descriptive flexfields attributes.

Note: Use the suffix "_Custom" in the Attribute column when adding a custom descriptive flexfields attribute. For example, let assume that the custom attribute created in the above steps is ListPrice. To enter ListPrice in the Attribute column, you must use "ListPrice_Custom" as the value.

8. Click the **Sources** tab.
9. Select the entity and map the new custom attributes to view object attributes.
10. Click the **Services** tab.
11. Select the entity. Add the new custom attributes and provide the read and write access.

Edit and Publish the Algorithm

Here are the steps required for editing and publishing the algorithm:

1. Sign in as a setup user.
2. Go to the Subscription Management work area.
3. On the Subscriptions landing page, click the **Subscription Configuration** tab.
4. Click **Manage Algorithms**.
5. Select the **Subscription Management and Account Receivables Integration** algorithm and click **Actions > Create version** to create a new version of this algorithm in the **In progress** status.
6. Click the latest version of the **Subscription Management and Account Receivables Integration** algorithm to open it in the edit mode.
7. In the **Algorithm** tab, click **Edit** to edit Actions in the Each Row Actions section.
8. On the Edit Actions page, enter the code for adding additional descriptive flexfields attributes. Here's the table that describes the values required in the code:

Name	Description	Examples of required values
AttributeContext	This attribute is used to identify the AR descriptive flexfields.	TransactionLineDff TransactionInterfaceHeaderDff
AttributeName	Table column or standard column name.	ATTRIBUTE8 or BU_NAME

Name	Description	Examples of required values
AttributeValue	Value of the attribute. You can source this value from any subscription entity.	BillLines.ListPrice_Custom Here BillLines is a subscription entity and ListPrice_Custom is an attribute.
FlexContext	Descriptive flexfields context name	Invoice Lines

9. Go to the **Variables** tab.
10. Select the CustomizationFlag value and update the Default expression value as "**True**".
 - Note:** The Default expression value is set as "False" by default.
11. Click **Save and Close**
12. Select the same Subscription Management and Account Receivables Integration algorithm and click **Actions > Publish**.

Run the Send Subscription Information to Receivables Scheduled Process

After you create and activate a subscription, perform these steps to run the scheduled process:

1. Navigate to **Navigator > Tools > Scheduled Processes**.
2. on the Schedule Processes Overview page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, enter **Send Subscription Billing Information to Receivables** in the **Name** field and click **OK**.
4. In the Process Details dialog box, make the necessary selections.
 - o Click **Process Options** to set options such as language, currency, and time zone.
 - o Click **Advanced** to define the schedule, notifications, or output parameters.
 - o Select the **Notify me when this process ends** field to receive an e-mail notification.
5. In the Basic Options section, add the required parameters to filter the billing transaction records.
6. Click **Submit**.

You can use parameters to filter or group the billing transactions you want to interface with Oracle Receivables for invoicing. Here's more information about the parameters you add:

Parameter	Description
Subscription Number	Enter a subscription number to interface bill lines based on the specific subscription to Oracle Receivables.
BU Name	Enter a business unit name to interface bill lines based on the business unit to Oracle Receivables.
Customer	Select a customer to interface bill lines based on the selected customer.

Parameter	Description
Subscription Profile	Select a subscription profile to interface the bill lines based on the selected profile name. You can use this parameter to group all high-volume customers or all preferred customers for invoicing.
Interface Date	Enter the interface date to interface bill lines to Oracle Receivables that are grouped by a specific date-based batch. This helps to accommodate future billing transactions.
Number of Processes	Use this parameter to create sub-processes before running the scheduled process. You can optimize the performance of the billing process by setting process limits. By default, the application runs 10 sub-processes when you don't enter any value for this parameter.
Number of Records per Process	Use this parameter in combination with the Number of Processes parameter to indicate the records that are included per process while the scheduled process is running. By default, the application includes 10000 records for processing. You can also adjust the number of processes or records per process based on your requirements.

Withhold Sending Billing Information to AR

You can choose which bill lines are included in the invoice based on business requirements. You can withhold sending billing information to Oracle Receivables based on custom conditions. You can set up these conditions in the Subscription Management and Oracle Receivables integration algorithm so that billing lines are not interfaced unless the custom conditions are met.

For example, if you don't have valid PO for the bill line or if the amount is \$0, you can stop the bill line from getting interfaced to Receivables. To do this, you can use any standard attributes or define your own custom attributes in subscription header, product, covered level or bill lines, map them in service mapper, and define the custom logic in the **Subscription Management and Accounts Receivables Integration** algorithm.

To enable this:

1. Sign in as a setup user.
2. Navigate to the **Subscription Management** work area.
3. On the Subscriptions landing page, click the **Subscription Configuration** tab.
4. Click **Manage Algorithms**.
5. Select the **Subscription Management and Accounts Receivables Integration** algorithm row and click **Actions > Create Version** to create a new version of the base algorithm.
6. Click on the latest version of the algorithm **Subscription Management and Accounts Receivables Integration** to edit it.
7. On the Edit Algorithms: Subscription Management and Accounts Receivables Integration page, select the **Variables** tab.
8. Change the default value of **CustomizationFlag** from false to true.
9. Perform customizations as per business requirement, click Save and Close.
10. From the Manage Algorithms page, click **Actions > Publish**.

Related Topics

- [Subscription Management and Account Receivables Integration Algorithm Customization Whitepaper \(Doc ID 2732008.1\)](#)
- [How To Skip Subscription Charge Lines To Be Sent To RMCS From Subscription Management?](#)
- [Send To AR 'Bill To Contact Id' And 'Ship To Contact Id' Through Service Mapping \(Doc ID 2859255.1\)](#)

How do I manage export objects?

Export objects correlate with tables in Oracle Applications Cloud. Understand export objects and their attributes to manage the data that you want to export.

Supported Objects

You can export these objects and their child objects using Export Management:

- Access Groups
- Account
- Action
- Action Plan
- Activity
- Asset
- Assignment Rule Candidate
- Assignment Rule Condition
- Assignment Rule
- Assignment Rule Set
- Billing Contract Milestone
- Business Plan
- Campaign
- Case
- Compensation Plan
- Compensation Plan Component
- Compensation Plans Flex
- Competitor
- Condition Attachment
- Condition of Approval Comment
- Condition of Approval Transaction
- Condition Comply Period
- Contact
- Contract
- Contests
- Deal Registration
- Duplicate Resolution Request
- Geographies*
- Goals

- Household
- HRHelpDeskRequest
- Hub Source System Reference
- Inbound Message
- Incentive Compensation Performance Measure
- Incentive Participant
- Incentive Participant Goal
- Incentive Participant Role Assignments
- Interaction
- Interaction Participant
- KPI
- Linked Party
- MDF Budget
- MDF Claim
- MDF Request
- Nonduplicate
- Note
- Objective
- Opportunity
- Organization
- Partner
- Partner Programs
- Performance Measure Flex
- Performance Measure Rate Dimensional Input
- Performance Measure Score Card
- Plan Component
- Plan Component Flex
- Plan Component Performance Measure
- Plan Component Rate Dimensional Input
- Plan Component Rate Table
- Price Book Header
- Product
- Product Group
- Program Enrollments
- Promotion
- Queue
- Relationship
- Resolution Link
- Resolution Request

- Resource
- Resource Capacity
- Sales Forecast Quota
- Sales Lead
- Sales Orders
- Sales Territory
- Sales Territory Quota
- Self-Service Role
- Service Profile
- Service Profile Contact
- Service Request
- Standard Lookups
- Standard Text
- Standard Text Folder
- Standard Text User Variable
- Subscription
- Template
- Territory Geographies. For more information see [Export Territory Geography Zone Hierarchies? \(Doc ID 2853475.1\)](#) on *My Oracle Support*.
- Transaction
- Trees
- Wrap Up

Note: *Legal Note:* By exporting the Geographies data from the Oracle environment to Your environment, You agree that (a) Oracle is granting You only a restricted right to download the exported Geographies data specifically for Your use with the Oracle Fusion services; (b) the Geographies data may not be used, transferred, or uploaded for any other purposes; and (c) except for the restricted right granted in (a), all provisions of the Oracle Cloud Services Agreement (CSA) or Schedule C, as applicable to You, remain in full force and effect, including specifically section 3.4 thereof.

Export Object Details

Click **Tools > Export Management > Export Objects**. To see the details of an export object, select it on the **Export Object Details** page. Here are the details that you see about each exportable object:

Column	Description
Display Name	The object as it's called in the user interface.
Language Independent Code	The internal name of the object.
Parent Object	The parent object of the selected object. If there are multiple parents for an object, they're shown separated by commas.

Column	Description
View Hierarchy	Clicking on the View Hierarchy icon shows the hierarchy between the parent and child objects in a graphical format.
User Key	The attribute or the group of attributes that's used to uniquely identify a record.
Required Attributes	The attribute or the group of attributes for which values are required to create a record. These can't be NULL when updating a record.

Target Attributes

Here are the details that you see for each target attribute.

Column	Description
Display Name	Name of the target attribute in the user interface.
Attribute Name	Internal or field name of the attribute.
Required	Indicates whether the attribute is mandatory or not.
Default Value	The default value for the attribute, if any.
Type	Data type of the target attribute.
Length	Maximum allowed length for the target attribute values.
Description	A short description of the target attribute.

Export Inactive and Merged Data

You can export inactive and merged accounts, contacts, households, organizations, and persons using export management. You don't need to rely on data model queries to fetch the deleted or merged records.

Note: To export inactive records, you need to explicitly add the condition to the criteria, or else only the active records will be exported. For example, I for Inactive and M for merged. All associated child records (active or inactive) will be exported irrespective of their status, if no criteria is added.

Why doesn't the Subscription Profile show my custom transaction types?

Custom transaction types won't show up in the Subscription Profile if you created them in the Common set. This behavior is expected because the context of business units aren't available in the Subscription Profile.

How can I change the date format for an invoice?

If you want to change the date format in invoice text, you can customize the Accounts Receivable algorithm to send different data instead of the invoice text.

Contact My Oracle Support and reference the article [How to Populate Invoice Lines with Product Description Instead of Invoice Text on AR Side \(Doc ID 2692722.1\)](#).

How do I enable Subscription 360 in accounts?

The Subscriptions subtab in the sales Accounts details page, also known as Subscription 360, summarizes information about subscriptions owned by a customer.

Salespeople can use the Subscription 360 page to see active subscriptions, draft subscriptions, subscriptions about to expire, and monthly recurring revenue of active subscriptions. Salespeople can also use it to create and manage subscriptions and review key metrics. The Subscription 360 task flow can be embedded in Account, Contact, or Household objects.

Note: Subscription 360 is only available in the Account details page.

To enable the Subscriptions subtab in the Account details page:

1. Sign in to the application as a setup user.
2. Ensure that you're working in an active sandbox.
3. Navigate to **Application Composer** in the **Configuration** category.
4. In the navigation tree, expand **Standard Objects**, expand **Account**, and click **Pages**.
5. Ensure that the Simplified Pages tab is selected.
6. In the **Details Page Layout** section, duplicate the Standard layout.
7. Enter a new layout name, and click **Save and Edit**.

The Details Layout page appears.

8. Click **Add** in the Subtabs region.

The Create Subtab page appears.

9. Select **Mashup Content** and click **Next**.

The Select Mashup Content page appears.

10. Click **Task Flows**.

11. Select **Subscriptions** and click **Insert**.

The Task Flows page appears.

12. Enter **Subscriptions** as the **Display Label**.

This subtab appears on the Account details page.

13. Click the default image and select an appropriate image to change the default image on the subtab.

14. Select **Registry ID** as the **Party Number**.

15. Click **Save and Close**.

16. On the Details Layout page, click **Done**.

17. Ensure that the layout status for your new layout is **Active**.

18. As a salesperson or sales manager, navigate to **Sales > Accounts** to test the changes. Verify that you can see the Subscriptions subtab on the Edit Account page.

19. Publish the sandbox according to your company's business practices.

Configure the Subscriptions Role for Salespeople

Salespeople working with accounts might not have access to the Subscriptions page. In such a scenario, even if they can see Subscription subtab, also known as Subscription 360, on the Accounts page, they can't view, create, or edit subscriptions.

To enable Subscriptions 360 for salespeople:

1. Sign in to the application as an administrator with the IT Security Manager (`ORA_FND_IT_SECURITY_MANAGER_JOB`) role.
2. Click **Navigator > Security Console**.
3. Search for the role to which you want to grant Subscription Management permissions.
4. On the Function Security page, click **Add Function Security Policy**.
5. In the Add Function Security Policy dialog box, search for the **View Subscriptions for an Account** privilege.
6. Click **Add Privilege to Role**.
7. Click **Next** to go to the Data Security Policy page.
8. Click **Create Data Security Policy**.
9. In the Create Data Security Policy dialog box:
 - a. Enter the policy name, for example, Grant on Subscription.
 - b. Select **Subscription** as the Database Resource.
 - c. Enter start and end dates.
 - d. Select the appropriate data set.
 - e. Select all the available actions to grant complete access to subscription.
 - f. Click **OK**.
10. Click **Next** to go to the Role Hierarchy page.
11. Click **Add Role** and add these duty roles:
 - o Subscription Amendment External
 - o Subscription Authoring External
 - o Subscription Search and View Access External
12. Verify the summary information and click **Submit and Close**.

How do I set up credit card payments for subscriptions?

When a credit card is used on a subscription, Oracle Receivables creates the invoices using the card as the payment method. Oracle Receivables performs the authorization of the invoice amount and manages the fund capturing process.

You can use credit cards as the payment method in Subscription Management by integrating with Oracle Receivables. To use credit cards, you:

- Add a new credit card to the billing site and select that card in the Subscription Management UI.

For more information, see the *Customer Account Information* topic in the *Implementing Receivables Credit to Cash* guide.

Note in the Subscription Management UI, you can't:

- Add a new credit card payment method.
- Enter credit card token numbers.

Here are a couple of other ways use credit cards as the payment method in Subscription Management:

- Enable tokenization and use Subscription REST APIs to pass the token number of a new credit card. Once the token number is passed, the application automatically adds this card as a payment method for the billing site. For more information about enabling tokenization, see the *How You Enable Credit Card Tokenization* topic in the *Implementing Receivables Credit to Cash* guide.
- Perform credit card authorization during subscription activation by configuring the event model and using an authorization API provided by Subscription Management.

Refer to the REST documentation for sample payloads that pass token numbers to use credit cards as payment methods.

Set Up Credit Card Authorization

Before activating a subscription, you can authorize a credit card used as the payment method. The authorization helps you ensure that a valid credit card is used as the payment method. To use credit card authorization, you configure the event model.

Here are the steps to enable credit card authorization:

1. Sign in to the application as a setup user.
2. Ensure you're working in an active sandbox with the **Configure Business Objects** tool enabled.
3. Navigate to **Subscription Configuration > Subscription State Management > Event Models**.
4. Use the Event Models task to configure events and actions for the `oracle.apps.subscriptionManagementsubscriptionService.view.SubscriptionsVO` business object.
5. In the States section on the Edit Event Model page, select **General**.

6. In the General: Details section, configure the VALIDATE event and add an action to perform a credit card authorization using the API call in Groovy script as follows:

```
eventModel.execute('StatusManagementAM').authorizeCreditCards(SubscriptionId,1.0,eventModel.eventData.SequenceId,'E');
```

Note: The parameter 1.0 is the authorization amount, and you can change it based on your business need. Use the parameter `e` if you want this validation to be an error. Use the parameter `w` instead if you want this validation to be a warning.

7. The API returns an Array List whose first element is Success or Failure. In case of failure, the second element of the Array List returned is a list of error messages for each credit card authorization that failed. If required, you can use these return values to write any custom business logic.
8. Test your changes and publish the sandbox.

Refer to the Oracle Financials documentation to understand more how credit card authorization, funds capture, and settlement flows work in the application.

If customer acceptance is required, who receives the email notification?

The notification is sent to the email address entered on the quote in Renewal Controls > Negotiation Settings > Quote To section.

For more details, see the article Renewal Reminder Email Notification for Subscriptions And Contracts Technical Brief (Doc ID 2731244.1) on My Oracle Support.

How do I set up VAT or other tax policies for CX?

VAT and other tax-related setups for CX are done in the Oracle ERP applications, such as Oracle Financials; the application you use depends on your configuration. On [Oracle Help Center](#), search using keywords for what you need, such as "VAT" or "tax".

Can I pass custom fields to Accounts Receivable?

Yes, you can. You can create custom fields for Subscription Management and then pass them to Oracle Accounts Receivable (AR) or Oracle Revenue Management Cloud (RMCS). This type of configuration uses service mappings and integration algorithm customizations.

As a part of the prebuilt integration between Subscription Management and AR or RMCS, Subscription Management sends a fixed list of fields for each billing line to the ERP applications. You might have unique use cases where you want to pass additional custom or standard attributes from Subscription Management to AR or RMCS standard fields

or to custom descriptive flexfields. This types of customizations use service mappings and integration algorithm customizations.

For more information, see [Subscription Management and Account Receivables Integration Algorithm Customization Whitepaper \(Doc ID 2732008.1\)](#) on My Oracle Support.

Can I automatically generate the billing schedule after updating products?

You can by using the API `GenerateBillingSchedule` set to Y.

Can I see prior changes to a field after I've added it to the application?

No, you can't. Audit history (also called change history) for a field only shows up in audit results after it's been added to the application.

See [What fields can I audit for Sales?](#) for details on the supported objects and how to enable change history in the application.

How do I initiate a customer asset transfer with included warranty?

Here's how:

1. In the Subscription Configuration area, Asset overview page, change the Customer and Account for the asset.
2. Check the asset in the Reprocess Installed Base Updates area.
3. Run the reprocess job.
4. Check the Subscription Details subtab against the asset and check that the new included warranty is available.

Note: The item that the asset has been created against needs to have an included warranty associated with it.

Why wasn't a coverage template auto-populated based on default coverage setup?

If you've set up default coverage on a global or customer level, the coverage doesn't get automatically applied on coverage products in subscriptions. You need to select a coverage at the product level.

As a prerequisite, ensure that a warranty item is set up in the Oracle Product Information Model (PIM). After you set up the product as a warranty item, then you can manually select standard coverage for the product. The navigation in the product model is Product Management > Product Information Management > Manage Items > select a warranty item > Specifications > Service > Standard Coverage.

Can I update multiple subscriptions at the same time?

Yes. Instead of managing each subscription individually, you can click **Actions** and select these operations to manage multiple subscriptions at once:

- Close
- Cancel
- Update
- Suspend
- Resume

Steps to Update Many Subscriptions at Once

Here are the steps to mass update many subscriptions at once:

1. Navigate to the Subscription landing page.
2. Select **Actions** and then the action you want to use, like Close, Update, and so on.
3. Select the subscriptions you want to update.
4. Finally, in the resulting page, make your selections and save your changes.

Important Points

Keep these important points in mind:

- Your subscription application must be configured to use this functionality. Contact your help desk if this feature isn't available. Your application administrator can enable this feature using Application Composer.
- We recommended you to update up to 50 Subscriptions at once. However, administrators can configure the total amount allowed using the Maximum Number of Subscriptions to Update profile option.

Related Topics

- [Can users update multiple subscriptions at once?](#)
- [How do I search for subscriptions and use filters?](#)

Can users update multiple subscriptions at once?

As a part of sales transactions, a subscription specialist is required to perform the same actions on multiple subscriptions. Instead of performing these actions on each subscription individually, you can enable a subscription specialist to mass update subscription fields of multiple subscriptions at once.

Here are the steps to enable the Update action on the subscription landing page:

1. Sign in to the application as a setup user.
2. Ensure you're working in an active sandbox with the **Application Composer** tool enabled.
3. Click **Navigator > Configuration > Application Composer**.
4. On the Application Composer page, select **Objects > Standard Objects > Subscription > Pages**.
5. In the Landing Page Layouts section, click **Actions > Duplicate** or edit your existing custom layout.
6. On the Landing Page Layout: Default custom layout page that opens, click the **Edit** icon for Subscription Overview Table.
7. Move the **Update** field from the **Available Actions** section to the **Selected Actions** section.
8. Click **Save and Close**.
9. Click **Done**.
10. Publish the sandbox according to your company's business practices.

Related Topics

- [Can I update multiple subscriptions at the same time?](#)
- [How do I search for subscriptions and use filters?](#)

Can I sync my Financials accounts with Sales?

After users create accounts and contacts in Oracle Financials, use the scheduled process, Synchronize Financials Cloud Accounts and Contacts, to sync the data into Oracle Sales. This process is one-way, from Financials to Sales.

Here's how the process works:

1. The scheduled process checks for all party records (organization and person) that have the Customer usage in Financials and that don't have a record in the Sales Accounts table (ZCA_SALES_ACCOUNTS) in the sales application.
2. For the identified records, the process inserts new records in the Sales Accounts table, and in the Party Usages table (HZ_PARTY_USG_ASSIGNMENTS), for Organization, Sales Account, and Person.

Important Points

Keep these points in mind as well:

- After the billing process finishes, the application creates billing accounts and contacts in Financials.
- The party used for the Sales account customer is available in Oracle ERP after you convert it to a billing account from the Oracle Accounts Receivable UI.
- The process supports addresses associated with customer accounts and contacts. It also supports address purposes, such as bill-to.
- Enable the Billing Accounts subtab from Application Composer to let your users see the customer account number and the description.
- If you need your data to refresh regularly, it's a good idea to set up a schedule for the process using the advanced option in the scheduled processes window.

Steps to Sync from Financials to Sales

To sync accounts and contacts data from Financials to your sales application:

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. Click **Actions** > **Schedule New Process** and search for the `synchronize Financials Accounts and Contacts with cx sales` process.
3. Verify that the data is synchronized in your sales application: Sign in to the Accounts pages as a user who has access to the sales pages, such as the sales administrator or a salesperson, and view the new data.

Related Topics

- [How do I allow the update of sales contacts while protecting ERP contacts from being edited?](#)
- [Why are my accounts created in Sales appearing in Accounts Receivable?](#)

How do I search for subscriptions and use filters?

You can search for a subscription using the subscription number from the Subscription Management landing page.

On the Subscription Management landing page, enter the subscription number you are searching for in the **Find** search box and click the **Search** icon.

Search Using Advanced Search

1. On the Subscription Management landing page, click the **Show Advanced Search** icon (filter icon).
2. Use the search criteria in Advanced Search to search subscriptions. This table describes a few criteria you can filter your search by:

Field	Description
Subscription Number	Filter search by subscription number
Customer	Filter search by customer name
Status	Filter search by the status of the subscription. For example, active or expired.
Days to Expiration	Filter search by the expiration time frame. For example, subscriptions expiring in 30 days
Product Name	Filter search by product
Covered Asset Number	Filter search by covered asset

3. To add more search criteria or filters, click **Add** and select the filters.
4. Click **Search**.

Note: The list page doesn't show decimals for amount fields.

Search Using Saved Search

You can save the criteria that you use the most for quick access.

1. On the Subscription Management landing page, click the **Show Advanced Search** icon.
2. Select the search criteria to filter your search results.
3. Click **Add** to add more search criteria if needed.
4. Click **Save**.
5. In the **Name** field on the Create Saved Search dialog box, enter a name for your saved search. This will appear in the Saved Search menu in Advanced Search.
6. Select **Set as Default** to set it as the default search criteria.
7. Select **Run Automatically** to ensure that the application runs this search automatically every time you navigate to the Subscriptions landing page.
8. Click **OK**.

Can I implement standalone subscriptions without other Oracle Fusion applications?

You can't use Subscription Management in a standalone implementation with no other Oracle Fusion applications.

How do I amend or close included warranty subscriptions?

To close a covered asset for an included warranty:

1. End date the asset on the included warranty subscription by setting Customer Asset End Date and Asset End Date.
2. Submit the change by running the scheduled process, Reprocess Installed Base Updates.
3. Run the scheduled process, Process Customer Asset Updates.
4. Run the scheduled process, Update Subscription Status after two days of customer asset return or termination, so that the respective covered asset status is updated to Closed.

Note: The included warranty product line will still appear as active on the subscription, but the asset in Covered Levels will appear as closed. The included warranty takes the end date from the Subscription end date and can't be modified. An included warranty can't be terminated or amended. You can only terminate/modify the covered level asset, but the included warranty will remain as is.

You can also renew an included warranty and make it an extended warranty. See the next section for more information.

Renew Included Warranty

You can use the Renew action available for an included warranty and renew it to an extended warranty. You can manually renew an included warranty when the subscription is in the Active status.

1. Open an included warranty subscription.

2. Click **Actions > Renew**
3. On the Renew Subscription window, enter a value in the **Renewal Duration** and **Renewal Period** field.
4. Click **Save and Continue**.

Once you renew an included warranty subscription, it's created in the draft status. You can navigate to the **Relationship** tab to find the included warranty subscription used to renew the new subscription in the draft status.

Note: Coverage products can only be renewed when they're mapped to an extended warranty item in Product Information Management.

Why am I getting the error, "Unable to retrieve content. Additional information for Remote Region error #5?"

If you're getting the error, "Unable to retrieve content. Additional information for Remote Region error #5" when setting up products, it's possible that you haven't set the profile option, Sales Products Item Organization.

Set the profile option and try again.

How can I bill using estimated usage?

For a usage-based subscription product, you can bill your customer in advance based on estimated usage.

In the Pricing tab, you can price your usage charge based on:

- The estimated amount or estimated quantity, along with an invoicing rule
- The minimum amount or minimum quantity

Once you've billed your customer based on estimated usage, you can run the **True Up Usage Bill Lines** scheduled process -- after you get the actual usage -- to true up the billed amount. This scheduled process compares the amount that was billed based on estimated usage against actual usage and creates a settlement.

You can also define a minimum committed usage threshold per charge period, either in conjunction with or independent of defining an estimate. If the actual usage for the billing period falls below the defined minimum threshold, the application uses the minimum usage value for billing.

Also note these points:

- If you set up both the minimum and estimated usage, the estimated usage value must be higher than the minimum usage value.
- You can set up the minimum or estimated usage for subscriptions in the draft status. Once a subscription is activated, these fields become read-only, but you can amend the subscription to change them.

Steps to Add Estimated Usage

Here's how you can define estimated usage values and true up the billed amount:

1. Navigate to the Subscription details page.
2. From the Products section, select a usage-based product.

3. On the Edit Product page, click the **Pricing** subtab.
 - a. Optionally, enter a value in the **Minimum Amount** or **Minimum Quantity** field.
 - b. Click the **Add** icon in the **Estimation** column to add estimation values.
 4. In the Usage Estimation window:
 - a. Select the **Estimation Method** value as Estimated quantity or Estimated amount.
 - b. Enter a value in the **Estimated Quantity** or Estimated Amount field.
 - c. Select **Invoicing Rule** as Advance Invoice or Arrears Invoice.
 - d. Click **Save and Close**.
- Note:** The application populates the usage charge type only when you're using estimated usage, because:
- You estimate usage, and the application generates a new line with the estimated amount.
 - At the end of the month, the application calculates the difference. A third line holds the true up value (which can be billed if it's more than the estimated value or credited if it's less).
- Usage charge type will have one of the following values: Actual, Estimated, or Trueup.
5. Click the **Billing Summary** tab to see the new rows added for the estimated charge and to verify the usage quantity and amount.
 6. In the Billing Summary tab page, click **Actions** and select **Generate Billing Schedule Lines** to generate the billing schedule lines.
 7. Activate the subscription.
 8. From a row with the usage quantity, click **Action** and select **Update Usage Quantity** to change the usage quantity.
 9. Run the **Acquire Subscription Usage Data from an External Web Service** scheduled process to obtain usage quantity values for actual bill lines.
 10. Run the **Fetch Pricing Information for Subscriptions and Generate Billing Schedule** scheduled process to obtain the amount for actual bill lines.
 11. Run the **Send Subscription Billing Information to Receivables** scheduled process to interface bill lines. After running this scheduled process, the application updates the Interfaced value for the estimated bill lines as **Y** in the **Billing Summary** tab.
 12. Run the **True Up Usage Bill Lines** scheduled process to adjust or true up the billed amount.

Bill Lines with the Same Charge ID

For bill lines with the same charge_id, if one of the bill periods doesn't have any readings, usage readings won't get updated correctly. Say, for example, there are 4 bill lines with same charge_id and all of them have meter readings except line 2. In this case, the application updates meter readings only for bill line 1.

Keep in mind:

- Every meter should have an initial reading.
- All past bill periods should have at least one reading.
- You can run the Acquire Subscription Usage Data from an External Web Service scheduled process only once for a bill period. Any meter reading entered after running the process is computed against the following month.

Update Estimated Usage Quantities

You can update estimated usage quantities of usage-based subscription products over the contract period based on past or projected consumption. You can update the estimated usage quantities on non-interfaced lines only.

Here's how:

1. Navigate to the Edit Product page of a usage-based subscription product.
2. Click the **Billing Summary** tab.
3. Navigate to a non-interfaced billing line and click the gears icon in the Actions column.
4. Click **Update Usage Quantity**.
5. In the Usage Estimation Window:
 - o Select the Estimation Method value as **Estimated Quantity**.
 - o Enter the updated value of estimated usage quantity in the Estimated Quantity field.
6. Click **Save and Close**.

Note: Regenerate Billing Lines once Estimated Quantity is updated at Product Charge level.

Things to Keep in Mind

Here are a few things to keep in mind when using estimated usage:

- If billing occurs more frequently than the charge period or if there's a partial period billing, the estimate and minimum usage value are prorated for that bill line accordingly.
- You can't interface the **Actual** bill line to Accounts Receivable and this usage charge type doesn't show any invoice details such as Interface Date, Invoice Text, Invoice Date, Invoice Number, and so on.
- When you terminate a subscription before the application obtains actual usage values and the **True Up Usage Bill Lines** scheduled process completes, the application generates a credit based on the billed amount. This amount is prorated based on the closed or suspended date. Once the actual usage is available, the true up scheduled process makes necessary adjustments based on the billed amounts.
- When amending a subscription, the application copies estimation attributes to the new draft subscription line. But, when duplicating a subscription, the charges aren't copied. Therefore, no estimation attributes are copied from the original to the new subscription.
- In the Usage Estimation window, when you select the invoicing rule as Advance Invoice:
 - o The application bills the usage charge in advance based on the estimation method.
 - o The application creates settlements for the billing period when the actual usage values are obtained.
 - o The date of the settlement credit memo is tied to the last month's invoice.
- In the Usage Estimation window, when you select the invoicing rule as Arrears Invoice:
 - o The application bills the usage charge based on the actual usage if the usage reading is available.
 - o The application uses estimated reading when the actual usage reading isn't available. After the actual usage values are obtained, the application creates settlements for the billing period.
- You can only update estimated usage quantities and not the estimated usage amount.
- You can't update the estimated usage quantities of interfaced bill lines.

Why does my inactive bill-to site still appear in search results?

Even after you end date a bill-to site in Oracle Accounts Receivable, it still appears in Subscription Management search results until you raise a service request with My Oracle Support to get it removed.

What descriptive flexfields can I use in subscriptions?

You can enable descriptive flexfields for subscriptions and subscription products using the Manage Descriptive Flexfields task in the Setup and Maintenance work area.

Once you define the descriptive flexfields, you can access these on the Subscription Number and Edit Product page by navigating to **Actions > Edit Additional Information**.

In Subscription Management, descriptive flexfields coexist with Application Composer custom attributes. Oracle recommends that you use descriptive flexfields only for choice lists that can't be created using the Application Composer fixed choice list and dynamic choice list.

Here are the descriptive flexfields types you can define at the subscription and subscription product level:

- Character: 30 attributes
- Number: 10 attributes
- Date: 10 attributes

Subscription Management supports the use of the following subscription attributes for setting the initial value of segment values:

- Customer
- Bill to Account
- Bill to Site
- Ship to Account
- Ship to Site

For subscription products, only Inventory Item or Inventory Product is supported to set the initial value of a segment.

Here are a few limitations of using descriptive flexfields in Subscription Management:

- Descriptive flexfields segments aren't visible in service mappings. You must use algorithm extensions to interface descriptive flexfields values to Oracle Accounts Receivable and Oracle Revenue Management Cloud Services.
- Column names in an import CSV file don't match the descriptive flexfields segment names. You must do manual mappings.
- Hierarchical import of Subscription and Subscription Product descriptive flexfields isn't supported. You must import these independently.

- Search based on descriptive flexfields segments on the Subscriptions landing page isn't supported.
- Descriptive flexfields segments aren't supported in Subscription SOAP services.

Subscription Import and Descriptive Flexfields

- The descriptive flexfield attributes can be imported and updated in all subscription statuses.
- No validations are performed during import of descriptive flexfield attributes.
- Descriptive flexfield attributes can't be deleted using Import Management.

Subscription Lifecycle and Descriptive Flexfields

- Descriptive flexfields are copied to the new subscription or subscription product when the subscription header or subscription product is copied.
- Descriptive flexfields are copied to new product line when a subscription product line is amended separately or amended using mass update.
- Descriptive flexfields are copied to a new product line when Schedule Product Change is performed, when a subscription is renewed, and on resumption of a suspended product line. During consolidation at time of renewal the descriptive flexfields aren't copied.

You can use descriptive flexfields to create global and context-sensitive segments. This feature lets you write SQL queries to retrieve data from other products, such as Oracle Order Management and Oracle Accounts Receivable.

For more information about descriptive flexfields, see the *Oracle Applications Cloud Implementing Applications* and the *Oracle Applications Cloud Configuring and Extending Applications* guides.

Related Topics

- [Overview of Descriptive Flexfields](#)
- [Overview of Transactional Business Intelligence Configuration of Descriptive Flexfields](#)

How can I send bill lines to Accounts Receivable

You can send bill lines to Oracle Accounts Receivable by either:

- Running the Send Subscription Billing Information to Receivables scheduled process
- Using the **Action > Send Bill Lines to Receivables** on the subscription landing page or on the subscription products page to directly send bill lines to Accounts Receivable

You can use the **Send Bill Lines to Receivables** action when a subscription or subscription product is in one of these statuses:

- Active
- Under amendment
- Closed
- Expired

The administrator must enable the action before you can see it in the UI. See the *section later in this topic* for more information.

On the Billing Summary tab, the Sent Date column displays the date that a bill line was sent to Account Receivables. This field is disabled by default. To enable this field, see the *Enable Sent Date in Billing Summary* topic.

Note: Closed and on-hold products lines aren't sent to Accounts Receivable during the Send Subscription Billing Information to Receivables process, even if the subscription is active. This process only looks at product status and not at subscription status. It only sends data from products data, not from subscriptions.

Enable Sent Date in Billing Summary

You enable the Sent Date field on the Billing Summary tab using Application Composer:

1. Sign in to the application as a setup user.
2. Ensure you're working in an active sandbox with Application Composer enabled.
3. Click **Navigator > Configuration > Application Composer**.
4. Select **Objects > Standard Objects > Subscription Product > Pages**
5. In the Details Page Layouts section, click **Actions > Duplicate** and click **Save and Edit**.
6. On the Details Layout: Default custom layout page, select the **Billing Summary** subtab, and click the **Edit** icon in the Subtabs Region section.
7. On Details Layout: Default custom layout: Subtab: Billing Summary page, move the **Sent Date** field from the **Available Fields** section to the **Selected Fields** section.
8. Click **Save and Close**.
9. Click **Done**.

Restrict Send Bill Lines to Receivables Option

The **Send Bill Lines to Receivables** action on the subscription or subscription products page is enabled by default. However, you can disable this action:

1. Sign in to the application as a setup user.
2. Ensure you're working in an active sandbox with the Application Composer enabled.
3. Click **Navigator > Configuration > Application Composer**.
4. Select **Objects > Standard Objects > Subscription > Pages**
5. In the Details Page Layouts section, click **Actions > Duplicate** and click **Save and Close**.
6. On the Details Layout: Default custom layout page, click the **Edit** icon beside the Actions, Save, Save and Close, and Cancel fields.
7. On the Details Layout: Default custom layout: Buttons and Actions page, move the **Send Bill Lines to Receivables** field from the **Selected Actions** section to the **Available Actions** section.
8. Click **Save and Close**.
9. Click **Done**.

How can I generate invoices in Revenue Management?

After the integration with Oracle Revenue Management has been established, you need to set up service mappings to map fields between the two applications.

What are service mappings?

Service mappings let you extend the subscription data that gets sent to a destination application, such as Revenue Management.

Service mappings are divided into three categories: Entities, Sources, and Services:

- **Entities** are used to create custom fields or identify standard fields that receive their input values from view object attributes identified in **Sources**.
- **Services** are the algorithms that can be used to change or transform a field in an entity, based on Groovy script. Services define the entity attributes that can be read and written by algorithms.

Change the Service Mappings

If you change the predefined algorithm, then you need to enable the change by setting the value of the `CustomizationFlag` to `true`.

Note: You should only change the latest algorithm.

If CustomizationFlag is False

If the last-published-version algorithm variable has its `CustomizationFlag` as false, this means you want to process the Revenue Management data without any customizations.

If CustomizationFlag is True

If the last-published-version algorithm variable has its `CustomizationFlag` as true, this means you want to process the Revenue Management data with the customizations made in that version.

1. Create a sandbox with Extensibility and Manage Service Mappings tools enabled.
2. Enter the sandbox.
3. Navigate to **Manage Service Mappings** and open **Subscription RMCS Integration**.

To create a custom variable in the Subscription entity:

1. Select **Subscription Entity** in the **Entities** tab.
2. In the details table, click the plus icon to add a custom variable
3. If you're creating a row for `SubscriptionNumber`, which isn't available by default in the service mapping, enter the Attribute Name as `subscriptionNumber_Custom`. Note that `_custom` is mandatorily followed for custom variables. For Type, use `string`, since Subscription Number is a string.
4. Click the **Sources** tab.
5. Select the **Subscription** entity.
6. In the child table, add a row.
7. Select the **SubscriptionNumber_Custom** lookup from Entities.
8. The name used in Subscription Entity is View Object Attribute.
9. Go to the **Services** tab and select the **Subscription** entity. Create a row in the details table, and select **SubscriptionNumber_Custom** . Give it read and write operations.
10. Navigate to the algorithm, **Subscription Management and RMCS Integration**.
11. Create or select a latest version algorithm that's active. Deactivate it, and re-activate it, to move the algorithm to an in-progress state.
12. Open the in-progress algorithm. It has two steps: Documents and Document Lines.
13. Write a Groovy script per your business requirements.
14. Navigate to the **Variables** tab and change the default expression of `CustomizationFlag` to true.
15. **Save and Close** the algorithm and **Publish** it.

Useful Tips to Manage Service Mappings

- Service mappings are the initial landing point to map attributes that need to be used to extend Subscription Management.
- As delivered, Oracle provides only primary attributes in service mappings. To add more attributes, you need to define in Entities, Sources, and Services.
- Any new variable you create in a service mapping -- even if it points to a standard attribute or to a customer-defined attribute -- needs to be named <VariableName_Custom>.

You can find more information on this subject in the My Oracle Support article, [How To Skip Subscription Charge Lines To Be Sent To RMCS From Subscription Management? \(Doc ID 2665162.1\)](#).

Why aren't the billing summary and pricing information getting generated for included warranty products?

Included warranties shouldn't have billing schedules. Only extended warranties (or other types of subscriptions) have billing schedules and pricing information.

How can I integrate subscriptions with order management?

The Integrate Order Management with Subscriptions feature lets you bring your orders in from a third-party system, with products and subscriptions or coverages, into Oracle Order Management, and then use the orchestration flow to send them to the appropriate fulfillment system at the correct time. All of the revenue data is communicated to Oracle Revenue Management for revenue capture and management.

Read the article on [Integrate Fusion Order Management with Subscription Management \(Doc ID 2965384.1\)](#) on My Oracle Support to understand how to manage the integration between Oracle Order Management and Oracle Subscription Management.

How do I set up and use the invoice workbench?

The Subscription Management Invoice Workbench lets you change invoices in Accounts Receivable. You can correct, recall, and approve subscription invoices from the subscriptions UI.

The Invoice Workbench lets you reverse an invoice that's incomplete, update a bill line amount in the billing summary, and send the updated bill line to Fusion Receivables to complete the invoice. This feature is useful to prevent incorrect invoices being sent to your customers, thereby reducing invoice disputes.

For more information, see the article on My Oracle Support, [How to set up and use the Invoice Workbench in Subscription Management? \(Doc ID 2965387.1\)](#).

How do I set up rate charges and usage plans?

Set up a rate plan in a price list so that you can create and manage charges for each of the subscriptions that you have in Subscription Management. Set up usage charges for your rate plans so you can bill your customers according to usage.

The Usage Rating feature supports both prerated events (where events are captured and rated in an external system and Subscription Management is used as a pass-through for billing) and events to be rated.

For more information, see [Usage Rating for Fusion Administered Rate Plans Technical Brief \(Doc ID 2978638.1\)](#) on My Oracle Support.

How can I set up an event-level usage rating for a usage charge?

You can set up an event-level usage rating for a usage charge. And, you can load multiple usage events from any pass-through application into Subscription Management for rating and billing.

The Usage Rating feature supports both prerated events (where events are captured and rated in an external application and Subscription Management is used as a pass-through for billing) and events to be rated.

For more information, see [Event Level Usage Rating for Pre-priced Flows Technical Brief \(Doc ID 2978640.1\)](#) on My Oracle Support.

How can I set up balance management with usage ratings?

The Balance Management feature lets you track quantity-based allowances and usages in a balance register. You can configure balance codes and associate a condition to decide which usage events or allowances are considered while tracking a given balance.

For more information, see [Balance Management \(Quantity based Allowances\) Technical Brief \(Doc ID 2978639.1\)](#) on My Oracle Support.

What do I need to know about streamlined subscription attributes?

Some subscription attributes are read-only based on specific conditions. In addition, updates to certain records are restricted when they're in specific states and statuses. The streamlined attributes ensure that data integrity across Q2R applications is upheld and improves application performance.

Here are some benefits and rationale for streamlined subscription attributes, emphasizing the need-to-know information for our customer's information technology resources:

- **Data Integrity:** By limiting data modifications, we uphold the accuracy and consistency of our records.
- **Performance Optimization:** The implementation of read-only attributes reduces resource-intensive operations, resulting in improved application performance.
- **Regulatory Alignment:** Previously we allowed updates on subscriptions which resulted in the associated revenue contract and performance obligations being out of sync. This resulted in compliance issues. By restricting updates, we ensure the revenue contract and revenue obligations don't get out of sync.
- **Streamlined Workflows:** Consistent data in restricted states minimizes errors, streamlining workflows and reducing the need for manual intervention.
- **Scalability:** The data model's scalability is enhanced, since restrictions prevent anomalies that can arise from incorrect data modifications, allowing the systems to handle growing data volumes effectively.

For more information, see [Streamlined Subscription Attributes Data Model Restrictions \(Doc ID 2978641.1\)](#) on My Oracle Support.

How can I set up custom validations for subscriptions?

By default, Subscription Management supports many application validations. You can add your own validations by using custom hooks exposed using Application Composer.

Here are some custom validations you can implement:

- The start date of a subscription can only be the first of a month. This is a header-level validation.
- A product line can't be pending activation if it's a Bill Immediately product line. This is a product-level validation.
- An invoice rule of a Coverage product line can't be Advance Invoice. This is a product-level validation.

For more information, see [Custom Validations – Subscription Management \(Doc ID 2913088.1\)](#) on My Oracle Support.

How do I enable audit for subscriptions?

Here's how to enable audit history so that your users can see the change history of subscription objects and attributes:

1. Sign in as a setup user.

2. In the Setup and Maintenance area, use the search pane to search for the Manage Audit Policies task.
3. In the Manage Audit Policies page, click **Configure Business Object Attributes** in the **Oracle Fusion Applications** region.
4. Select the Subscription Management business object from the list.
5. Select the objects and attributes you want to audit in the Audit Name table.
6. Click **Save and Close**.

Note: Administrators must have the Manage Sales Audit Policies (FND_MANAGE_SALES_AUDIT_POLICIES_PRIV) privilege to do these steps.

If users are unable to see audit history in subscriptions, follow these steps:

1. Create an access group in Sales and Service Access Management.
2. Select and grant the rule, All Subscriptions, to this user.
3. Activate the rule.
4. Run these two scheduled processes jobs to sync the data:
 - o Send Pending LDAP Requests
 - o Retrieve Latest LDAP Changes

For information on which subscription attributes are auditable, see *What fields or attributes can I audit for subscriptions?*.

What fields or attributes can I audit for subscriptions?

Audit history lets you track the change history of a subscription or subscription product. Here are the subscription attributes and subscription product attributes that support auditing:

Subscription Attributes	Subscription Product Attributes
<ul style="list-style-type: none"> • Automate subscription line numbering • Bill Service • Billing Account • Bill-to Site • Communication Channel • Contact Name • Contract Layout Template • Copy To • Customer Acceptance • Description • Enable Electronic Signature • Enable Renewal Reminders • Exemption Reason Code • Internal Approval 	<ul style="list-style-type: none"> • Accounting Rule • Display Sequence • Invoice Text • Payment Method Code • Payment Terms • PO Number • Product Status Change • Renewal Type • Ship-to Party • Ship-to Site • Transaction Type • Wire Number

Subscription Attributes	Subscription Product Attributes
<ul style="list-style-type: none"> • Language • Primary Salesperson • Renewal Process • Ship-to Party • Ship-to Site • Short Description • Tax Exemption Certificate Number 	

Access the Audit Reports

To access the data recorded by the audit process, you view audit reports in the **Audit** subtab. You can access the **Audit** subtab from the Subscription detail page and Edit Product page.

The default search in the **Audit** subtab displays a summary of the audit history in the search results table. It includes key data such as date, user, event type, and description. For a detailed report, search again with modified search criteria. You can export the report summary to Microsoft Excel.

This table lists the search parameters and the outcome of their selection in the detailed report.

Search Parameter	Result of Selection
Include Child Objects	<p>This parameter displays all the child objects that were listed for that business object when audit was set up. For example, a sales order object that contains several items as child objects.</p> <p>Note that it only displays the objects at the immediate parent-child level. You can view the children at subsequent levels by selecting the child object as the business object type and then searching again.</p>
Show User-Related Details	This parameter displays the details of the "impersonator" who modified the objects during an impersonation (delegation) session.
Show Attribute Details	This parameter enables the attributes list so that you can select either all attributes or a specific attribute to view the changes. Based on the selection, the search results indicate whether the attribute was created, updated or deleted, and the corresponding old and new values.
Show Additional Object Identifier Columns	This parameter displays the instances (contexts) in which the business object was used. The context values identify the objects and the transactions in which they were used. Each context is unique and assigns a unique description to the business object.

Remember, audit records change only for the objects and attributes enabled by your administrator. For setup information, see [How do I enable audit for subscriptions?](#)

How can I see if a subscription is suspended?

You can track the changes in Relationship tab of the subscription product.

Go to: **Subscriptions > Products > drill down into product > Relationships**. Suspended lines show a relationship as Resumed To or Resumed From.

Can I bulk update custom fields?

You can use Oracle Import Management to bulk update any of your custom fields.

Here's how to find the names of your custom fields:

1. Navigate to **Tools > Import Management > Import Objects**.
2. Search for `subscription Product`.
3. Select the **Attributes** tab.
4. The custom field name displays in the Attribute Name field.

Related Topics

- [How do I import subscription data?](#)

How do I enable prospective accounting?

The feature, Enable Prospective Accounting for Price Changes, Renewals, Amendments and Terminations, enables you to achieve prospective (immaterial changes) in Oracle Revenue Management (RMCS) for price changes (using pricing term/bill line adjustment/credit memo), renewals, amendments, and terminations. This means that when there's a contract modification, the remaining unrecognized, allocated revenue is reallocated across the existing open and new performance obligations. Recognized revenue is left untouched.

You can specify the type of accounting to be performed in RMCS when you:

- Adjust bill lines
- Create manual credit memos
- Renew subscriptions
- Amend subscriptions
- Terminate subscriptions

In addition, when you adjust bill lines and create manual credit memos, you can also specify the revenue periods that will be impacted because of the bill line amount adjustment in a billing period.

For more information, see the article on My Oracle Support, [Prospective Accounting for Subscriptions \(Doc ID 2996838.1\)](#).

What should the value of the pricing application profile option be when integrating with Oracle CPQ?

When you integrate Oracle Subscription Management with Oracle CPQ, the `OSS_PRICING_APPLICATION` profile option value should be set to `CPQ`.

The profile option, `OSS_PRICING_APPLICATION`, determines where pricing comes from (for example, Oracle Fusion or a third party). If you're using Oracle Fusion Pricing, then this profile option should NOT be set.

How does Price Override Adjustment work?

You can adjust the price for an asset at the covered level (known as "pricing override") based on this logic used in the total contract value calculation:

For example, if you set the adjusted price at 1000:

1. The price adjustment is set as follows: **Price** = 1000, **Type** = Price Override
2. The monthly price is calculated as follows: $1000/12 = 83$ (83.33)
3. The total price is calculated as follows: $83.33*12 = 999.96$

To know more about price override adjustments, see the article, [Price Adjustment Rounding Off \(2803609.1\)](#) on [My Oracle Support](#).

What's the role of Oracle Accounts Receivable accounting rule in a Subscription Profile, and does it impact the frequency of revenue recognition?

Oracle Revenue Management Cloud Service (RMCS) manages revenue recognition as a standard based on parameters you set. The accounting rule in receivables does impact the frequency of revenue recognition, but for this to happen you need to set the value of the accounting rule as fixed and not deferred.

For example, to bill on a quarterly basis, you should set the value of accounting rule to `3 months fixed`.

How do I stop active subscriptions from getting invoiced?

To stop active subscriptions from getting invoiced, set the **Bill Service** value to `Do not bill` while importing the converted subscriptions or contracts.

What table should I use for reporting coverage and entitlements?

For reporting coverage and entitlements, you can use the `OSS_PRODUCTS` table where `COVERAGE_SCHEDULE_ID` is the same as `COVERAGE_HEADER_ID` from the table `OSS_COVERAGE_HEADERS`.

For more information on tables, see [OSS_COVERAGE_AVAILABILITY](#), in the Tables and Views for Sales and Fusion Service guide.

How's currency assigned to an automatically created included warranty subscription contract?

An automatically created included warranty subscription contract is assigned the same currency value that's defined or entered in the ledger currency.

For example, if the ledger currency value is USD, the included warranty subscription will show the same currency (USD).

To change the currency in an included warranty subscription contract, you must change the ledger currency.

To change multiple currencies, see the article [How To Use Multi-Currency Pricing In Oracle Subscription Management \(Doc ID 2679478.1\)](#) on [My Oracle Support](#).

How do I get started with the Revenue Transformation Solution?

As revenue leaders look to modernize and compete, that often means pivoting to new business models or expanding to hybrid models that incorporate subscriptions, products, and services. Oracle Sales is powering this transition with end-to-end business flows that extend to the Oracle Fusion ERP Suite for orders, invoicing, payments, and revenue recognition, enabling organizations to effectively and efficiently transition from one-time selling to anything-as-a-service (XaaS) models.

Oracle's Revenue Transformation Solution enables you to connect business processes to reach your full revenue potential. Oracle's revenue transformation solution combines Oracle Sales, Oracle Configure, Price, and Quote (Oracle CPQ), Oracle Sales Performance Management, and Oracle Subscription Management – plus a host of Oracle's other revenue operations applications – to establish and accurately manage sales targets, sell any combination of products and services on a subscription basis, and provide global visibility into sales performance and revenue reporting.

The solution lets you price your product competitively, leveraging Oracle CPQ pricing capabilities in a single, unified administration flow, offering a streamlined user experience.

For more information about how you can implement a complete revenue transformation solution using key integrated features of several Oracle applications or modules, see the [How do I get started with the Revenue Transformation Solution?](#) solution playbook on the [Oracle Help Center Sales > Playbooks](#) page.

How do I find the original subscription for a renewed subscription?

To find the original subscription for a renewed one, go to the SQL prompt and use the following SQL query: `Select SOURCE_SUBSCRIPTION_ID,TARGET_SUBSCRIPTION_ID,OPERATION_CODE from OSS_OPERATION_LINKS.`

You can also change the SQL query to get other details, such as subscription number, subscription product details, subscription dates, and so on. For more information on subscription operation links, see the [OSS_OPERATION_LINKS](#) table, in the Tables and Views for Sales and Fusion Service guide.

Can I implement standalone Subscription Management for accounting costs without other Fusion applications?

No, you can't use Subscription Management in a standalone implementation. We recommend that you use Revenue Management for accounting costs.

Can I add credit to a subscription that's billed through an external system?

No, you can't. If you try to add credit to a subscription that's billed through an external system, it would likely result in product functionality issues.

Can I create a quantity based on credit for usage?

No, you can't create quantities based on credit for usage. However, you might be able to use the Credit Memo Option field on the Subscription Profile page to automatically create on-account credit memos during closure or amendment of subscriptions.

The Credit Memo Option field has these values:

- On-Invoice: The application creates a credit memo that refers to the subscription bill line invoice, irrespective of whether invoice is paid or not.
- On-Account: The application creates an on-account credit memo, irrespective of whether the invoice is paid or not.
- Mixed: The application creates a credit memo that refers to the subscription bill line invoice if the invoice isn't paid. Or, it creates an on-account credit memo if the invoice has been paid.

The application checks whether the invoice impacted by amendment or closure has been paid in full or not. It then creates a credit memo based on the Credit Memo Option field value.

You can issue on-account credit memos from Subscription Management based on the subscription profile. This lets you preferentially create on-account credit memos and credit memos against invoices based on whether an invoice is paid in full.

Can I do a prepayment for a subscription?

You can bill your subscriptions up-front using the **Bill Immediately** check box in the Billing section on the Edit Product page. The invoicing rule to enable up-front billing must be Advance.

When you enable this field, the interface date and invoice date of all bill lines are the same as the first bill line, for both the subscription product and covered levels.

For example, consider a 2-year subscription product with a \$54,000 annual charge starting on July 1, 2021.

The billing configurations for this subscription are:

Product	Quantity	Start Date	End Date	Bill Frequency	Invoicing Rule	Billing Date
Product 1	1	01-Jul-21	30-Jun-23	Year	Advance	Period Start

The billing summary of this product line is:

Period	Charge	Sequence	Interface Date	Invoice Date	Bill-from Date	Bill-to Date	Amount
1	Annual Charge	1	01-Jul-21	01-Jul-21	01-Jul-21	30-Jun-22	\$54,000
2	Annual Charge	2	01-Jul-21	01-Jul-21	01-Jul-22	30-Jun-23	\$54,000

Period	Charge	Sequence	Interface Date	Invoice Date	Bill-from Date	Bill-to Date	Amount

Things to Keep in Mind

Keep these points in mind:

- The application copies the Bill Immediately selection when you duplicate, renew, suspend/resume, or amend a subscription product.
- Bill Immediately isn't supported for evergreen subscriptions or subscriptions with pricing terms.

How does tax get calculated on subscriptions?

Tax gets populated on a subscription based on a value from Accounts Receivable. It displays in the Estimated Tax number field on the subscription summary page.

Estimated tax is always recalculated based on certain factors and you can't populate it manually, like, for example, through import. Additionally, the Estimated Tax field isn't exposed automatically. You need to enable it using Application Composer.

How do I close a covered-level asset in an included warranty?

There are a few steps to close a covered asset for an included warranty.

High-Level Steps to Close an Included Warranty

Here are the high-level steps:

1. End date the asset for the included warranty subscription by setting **Customer Asset End Date** and **Asset End Date**.
2. Submit the change using the Reprocess Installed Base Updates scheduled process.
3. Run the scheduled process, Customer Asset Updates.
4. To update the respective covered asset status to Closed, run the scheduled process, Update Subscription Status, at least two days after the customer has returned the asset or it's been terminated.

Things to Keep in Mind

- The included warranty takes the end date from the subscription end date and can't be changed.
- The Included Warranty product line will still appear as active on the subscription. But the asset in the Covered Levels UI will appear as closed.

- An included warranty can't be terminated or amended. You can only terminate or change the covered level asset. The included warranty will remain as-is.

Can I bill a customer on a monthly basis even if the product's billing cycle is quarterly?

Yes, you can bill your customers on a monthly basis according to product usage.

Here are the high-level steps:

1. Create separate products for recurring and usage-based charges.
2. Configure the expected billing frequency at the respective product levels.

For more information about setting up charges, see [How do I set up rate charges and usage plans?](#)

Does it impact Oracle Revenue Management if I update a subscription without amendment?

No, updating a subscription without amendment doesn't impact Oracle Revenue Management, because the contract value isn't altered.

How do I close a covered-level asset in an included warranty?

There are a few steps to close a covered asset for an included warranty.

High-Level Steps to Close an Included Warranty

Here are the high-level steps:

1. End date the asset for the included warranty subscription by setting **Customer Asset End Date** and **Asset End Date**.
2. Submit the change using the Reprocess Installed Base Updates scheduled process.
3. Run the scheduled process, Customer Asset Updates.
4. To update the respective covered asset status to Closed, run the scheduled process, Update Subscription Status, at least two days after the customer has returned the asset or it's been terminated.

Things to Keep in Mind

- The included warranty takes the end date from the subscription end date and can't be changed.

- The Included Warranty product line will still appear as active on the subscription. But the asset in the Covered Levels UI will appear as closed.
- An included warranty can't be terminated or amended. You can only terminate or change the covered level asset. The included warranty will remain as-is.

Can I create a deep link to the order creation page?

Yes, you can use the deep links functionality to create a deep link to the order creation page.

Here are the high-level steps:

1. Sign in as a setup user and go to **Tools > Deep Links**.
2. Search for `order`.
3. Select the **Manage Orders (SALES_ORDER,CREATE)** link.
4. Create your link and use it in your UI as needed.

See the *Deep Links* topic in the *Configuring and Extending Applications* guide for more information.

Can I change the subscription number of a renewed subscription?

In the renewal rules template, simply leave a blank option for the Renewed Subscription Number list of values. This option lets you enter your own subscription number upon renewal.

Here are the steps:

1. Sign in as a setup user and navigate to Subscription Management.
2. On the Subscription Configuration page, click the **Subscription Configuration** tab.
3. Click **Manage Subscription Rules**.
4. Click the **Renewal Rules Template** subtab.
5. In the Renewal Templates page, click **Create**.
6. As you create the template, leave the Renewed Subscription Number field blank. This option lets you enter your own subscription number upon renewal.

Related Topics

- [How do subscriptions automatically or manually renew?](#)
- [How do I create and manage subscription renewal templates?](#)

How do subscriptions automatically or manually renew?

You can set up subscriptions to automatically renew or you can manually renew them.

You can manually renew a subscription when it's Active or Expired. To manually renew a subscription:

1. In the Subscriptions page, open a subscription and click **Actions > Renew**.

2. On the Renew Subscription page, enter the new subscription number.
3. Click **Save and Continue**.

Your renewed subscription is created according to the configured subscription profile. When one-time charges are associated with your subscription, these charges are added to your new subscription. You can also see the source and any renewed subscriptions in the Relationship subtab, which is included in the renewal rules template. This means that the general information in that subscription profile is used to renew the subscription. For example, the billing frequency is taken from that subscription profile and included in the renewal template. If you need to manage the billing frequency separately, the subscription profile should be removed from the renewal template.

Note: You can override renewal settings at the covered product level. For example, when you select **Do not renew** at the product level, then -- upon renewing a subscription -- the renewed subscription doesn't contain that product.

You can also set up your subscriptions for automatic renewal. You must have setup and administrator privileges to perform this action:

1. From the Navigator, select **Scheduled Processes**.
2. On the Scheduled Processes overview page, click **Schedule New Process**.
3. Select **Automatically Renew Eligible Subscriptions**.
4. Click **OK**.
5. Select your business unit and click **Submit**.

Go to the **Renewal Controls** subtab to override renewal settings on the renewal rules template. This table describes the combinations of renewal process, customer acceptance, and internal approval criteria:

Renewal Process	Customer Acceptance Required	Internal Approval	Description
Automatic	Not required	Not required	The application renews and activates the subscription.
Automatic	Not required	Required	The application renews the subscription and then sends it to an internal approver for approval.
Automatic	Required	Required/Not required	The application renews the subscription and leaves it in the subscription administrator's queue for further action. You can configure event notification rules to automatically send the subscription to the customer for acceptance.
Manual	Required/Not required	Required/Not required	The application renews the subscription and leaves it in the subscription administrator's queue for further action.
Do not renew	N/A	N/A	The application doesn't renew the subscription.

You can control which renewal period is used by the automatic renewal process on the Edit Renewal Rules Template page.

Example of a One-Month Subscription

Consider the following example of a one-month subscription:

Duration of Existing Subscription	Minimum Renewal Duration	Renewal Duration	Renewal Period
1 Month	60 Days	1	Year

By default, the subscription is automatically renewed for either the minimum renewal duration or the duration of the existing subscription, whichever is greater. In this case, the automatic renewal process will renew the subscription for 60 days. You can select the **Use renewal term for automatic renewal** check box to override this default. When selected, the automatic renewal process uses the Renewal Duration and Renewal Period values for the automatic renewal. In this case, the subscription will get automatically renewed for a period of 1 year.

Override Renewal Duration

You can override the renewal duration for subscriptions and subscription products, even if they are renewed automatically. You can use the Renewal Duration and Renewal Period fields from the Renewal Controls tab to override the automatic renewal duration at the subscription level. This duration is considered as an exception, and a renewed contract is created.

Similarly, you can use the Renewal Duration and Renewal Period fields on the Summary tab of the Edit Product page to override the automatic renewal duration at the product level. This duration is considered as an exception, and a renewed contract is created for the subscription product.

Automated Renewal Consolidation

Use the Consolidate Subscriptions feature to consolidate all the subscription due to be renewed over a given period into a single, renewable subscription. The application consolidates all subscriptions that belong to the same business unit or that have the same legal entity, primary party, pricing strategy, renewal process, or currency. When both your source and target subscriptions have the same service, the covered levels are consolidated into a single line in the target subscription.

Use the Consolidate Subscriptions option in the renewal rules template to consolidate subscriptions during the renewal process.

In the renewal rules template, you can use the Renewal Consolidation Grouping section to select criteria for merging two or more renewal subscriptions. The application performs subscription consolidation based on the default grouping rules and the rules selected by you.

Here are the grouping rules that the application uses by default:

- Business Unit
- Primary Party
- Legal Entity
- Currency
- Pricing System
- Renewal Process

Here are the grouping rules that you can select:

- Billing Account

- Bill-to Site
- Ship-to Party
- Ship-to Site
- Price Adjustment Type
- Payment Method

Note: In the case of Automated Renewal Consolidation, custom field values for the Subscription header, product, and covered level aren't carried over into the newly created subscriptions. Custom fields only get carried over when "Consolidate subscriptions" is unchecked under **Subscription Configuration > Renewal Rules Template**.

Coterminate

Use the coterminate feature to align the end dates of the renewed line. You can set the end dates of all the eligible lines to the latest end date, and the target subscription is also adjusted according to the latest end date of the subscription lines.

How do I create and manage subscription renewal templates?

Subscriptions can be renewed either manually or automatically. A subscription user can manually renew subscriptions using the Renew action, or you can configure the application to automatically renew subscriptions. Renewal rules determine the default renewal actions.

The application uses the renewal rules template associated with a subscription to get this information:

- Renewal process
- Customer acceptance criteria
- Internal approval criteria

When you renew a subscription, the application makes a copy of the existing source subscription. The source subscription can be Active or Expired. The application changes the effective and pricing details on the renewal subscription based on the default setup.

The life cycle of a renewal subscription is similar to a newly authored subscription. However, you can configure a different life cycle for a renewal subscription using the Event Model configuration. You can configure an event model to route the renewal subscription to the customer for acceptance, or to the subscription administrator for internal approval. You can also activate the subscription without either Customer Acceptance or Internal Approval.

Here's how to create a new template:

1. Sign in as a setup user and navigate to Subscription Management.
2. On the Subscription Configuration page, click the **Subscription Configuration** tab.
3. Click **Manage Subscription Rules**.
4. Click the **Renewal Rules Template** subtab.
5. In the Renewal Templates page, click **Create**.
6. On the Create Renewal Rules Template page, enter the details of the template.
7. Enter a name for the template.

8. Select the renewal level. All lines include all the lines from the subscriptions that might also include other lines. Eligible lines include only eligible lines from subscriptions.
9. Optionally, select **Consolidate subscriptions**. This option decides whether to consolidate subscriptions during the renewal process or not. The consolidation process applies to automatic renewals. If you select this option, then all subscriptions to be renewed over a given period are consolidated into a single subscription.
10. Select the **Price Adjustment Type**.
If you select Reprice, then the application calculates the latest price of the item at the time of renewal. If you select Markdown or Markup, then you must enter **Price Adjustment Basis** and **Price Adjustment Value** to adjust the list price of the product. Markup increase the price by the adjustment basis and value. Alternatively, markdown decreases the price by the adjustment basis and value.
11. If there's no price at the time of the renewal, the renewed subscription has no price. In this scenario, the subscription renewal rule should be:
 - o Price Adjustment Type: Markup
 - o Basis: Net Price
 - o Value: 0
12. Enter a value in **Days Before Expiration**. This is the number of days prior to expiration before the renew eligible subscriptions process picks the subscription for renewal.
13. Enter the minimum renewal duration. This is the minimum number of days for which the subscription is renewed.
14. Select the **Renewal Period**. The renewal is based on the renewal duration and period.
15. Select the **Use renewal term for automatic renewal** check box to automatically renew subscriptions based on the values defined in the **Renewal Duration** and **Period** field. This field provides you with additional flexibility in deciding the duration of your automatically renewed subscriptions.
16. Select the **Renewal Process**.

The three options to configure the renewal process at the time of subscription creation are:

- o Automatic: The application automatically renews and activates the subscription.
- o Manual: The renewed subscription is created and placed in draft status.
- o Do not renew: This option prevents the application from automatically renewing the subscription. If you select this option, the application removes the Renewal Type column from the dashboard for all lines and covered assets of the subscription. The subscription specialist can manually renew and email active and expired subscriptions.

The application renews all subscriptions that you identify for automatic or manual renewal.

17. Select the **Customer Acceptance Required** and **Internal Approval** criteria.

This table describes the combinations of Renewal Process, Customer Acceptance, and Internal Approval criteria:

Renewal Process	Customer Acceptance Required	Internal Approval Required	Description
Automatic	No	No	The application renews and activates the subscription.
Automatic	No	Yes	The application renews and submits the subscription for approval.

Renewal Process	Customer Acceptance Required	Internal Approval Required	Description
Automatic	Yes	N/A	The application renews the subscription and leaves it in the subscription administrator's queue for further action. You can configure event notification rules to automatically send the subscription to the customer for acceptance.
Manual	N/A	N/A	The application renews the subscription and leaves it in the subscription administrator's queue for further action.
Do not renew	N/A	N/A	The application doesn't renew the subscription.

18. Select the **Subscription Profile**.
19. Select the communication channel. This determines how you want to communicate and engage with your customers.
20. In the Renewed Subscription Number field, you have three options:
 - Leave blank: Leave this option blank if you want to enter your own subscription number upon renewal.
 - Autogenerated: Select this option to use an application-generated number for the renewed subscription.
 - Retain number: Select this option to keep the same subscription number.
21. Optionally select **Enable Reminders**. This option indicates whether or not your customer receives reminders.
22. Select the applicable **Coterminate** option.

If you select **Latest end date**, the all target lines are aligned to the latest target end date. The target subscription header is also adjusted according to the target lines.
23. In the Renewal Consolidation Grouping section, select the required consolidation criteria. The application performs subscription consolidation based on the default grouping rules and the rules selected by you. For more information about the available consolidation criteria, see the Automated Renewal Consolidation section in the Renew Subscriptions topic.
24. Click **Save and Close**.

Related Topics

- [How do subscriptions automatically or manually renew?](#)

How can I associate assets with subscriptions?

After you enable the Associated Assets subtab on the Edit Product page, subscription users can capture the details of assets on a subscription. In the Associated Assets subtab, users can easily identify which devices are using a subscription product.

To enable the functionality:

1. Navigate to the **Setup and Maintenance** work area.
2. Select the **Sales** offering and click **Change Feature Opt-In**.
3. On the Opt-In page, select **Subscriptions** and click the **Edit Features** icon.
4. On the Edit Features page, select the **Enable** option for the **Associate Assets with Subscriptions** feature. If the Enable column includes an Edit icon instead of a check box, then click the icon, select your feature options, and click **Save and Close**.
5. Click **Done**.

To associate a new asset with a subscription:

1. On the Edit Product page of a subscription product, click the **Associated Assets** subtab.
2. Click **Add Assets**.
3. Search and select the asset from the Search and Add: Assets page.
4. Click **OK** to associate the selected asset with the subscription product.

To add multiple child assets to a covered level:

1. While adding an asset, click the hierarchy icon in last column of the popup window.
2. Select the parent and child assets.
3. Save the changes.

Note: The Associated Assets subtab is only enabled for products that are marked as subscription-type sales products in Product Information Management's Order Management attribute.

How do I update contract attributes when I renew or duplicate a contract manually?

You can update contract attributes when you renew a contract manually, but you need to provide a new term for it, and the rest is automatically copied from the original.

Remember that you can't change the currency, the subscription profile, the price list, or the customer. The reason being, when submitting that action the intention is to renew the subscription in similar terms using the same customer, the subscription profile and the price list - otherwise it would mean creating a new subscription altogether.

When duplicating a subscription the only fields you can change are - **Customer, Bill to Customer, Billing Account, and Bill-to-Site**. The intention of doing this is to duplicate a similar existing subscription (probably for another customer), and that's why those parameters are editable. However, the intention is to do it as well in similar terms.

You could also try getting the information of an existing subscription through REST API. Change the attributes you want in the payload and create a new subscription with the changed payload.

For more information, see *REST API for Sales and Fusion Service in Oracle Fusion Cloud Customer Experience*.

Does a revenue contract get duplicated when integrating Subscription Management with Order Management?

No, revenue contracts aren't duplicated while integrating Subscription Management with Order Management.

For more information, see the **Integrate Order Management with Subscription Management** section in the **Implementing Order Management guide** on Oracle Help Center.

How do I stop active subscriptions from getting invoiced?

To stop active subscriptions from getting invoiced, set the **Bill Service** value to `Do not bill` while importing the converted subscriptions or contracts.

Is included warranty created automatically when I create a customer asset?

No, included warranty isn't created automatically when you create a customer asset.

When a customer asset is created, it creates a pending customer asset creation transaction in Subscription Management. For the included warranty to be created, you must process such transactions.

Here are the steps:

1. Go to **Subscription Management > Subscription Configuration > Asset Lifecycle Management > Reprocess Installed Base Updates**.
2. Search asset transactions by selecting **Customer asset creation** for Asset Transaction Type and **Pending** for Status.
3. Click **Submit** to process the pending asset transactions.
4. If any asset transactions fail to proceed due to an error, you can select the transactions using the check box and then Submit them again.
5. Run the Process Installed Base Updates process, which processes the asset transactions to create included warranty subscriptions. You can also schedule this process to run regularly and create included warranties automatically.

The included warranty is created by default for the business unit associated with the asset. If the asset business unit isn't available, then the application uses the default business unit from the subscription rule Asset Lifecycle Management specifications.

You can change the business unit associated with the asset, if needed:

1. Go to **Subscription Configuration**.
2. Click **Manage Subscription Rules**.
3. Click **Asset Lifecycle Management**.
4. In the Included Warranty Section, select the business unit you want to be the default business unit for the asset.

The Process Installed Base Updates process creates included warranty subscriptions for new customer assets. This process uses specific consolidation rules to determine whether the new customer asset should be added as a covered level for an existing included warranty line or if a new included warranty should be created:

1. Included warranty selection rules:
 - a. Find an active included warranty whose source order and business unit match the order reference and business unit associated with the customer asset.
 - b. If (a) doesn't return a match, find an active included warranty whose customer matches the sold-to party associated with the customer asset.
 - c. If the application doesn't find the included warranty in (b), then create a new included warranty.
2. If an included warranty is found in (1), these rules determine the line-level consolidation:
 - a. Find an active included warranty line that has a bill-to account and ship-to party (or party site) similar to the one associated with the customer asset and the included warranty product related to the product associated with the customer asset.
 - b. If no active line is found in (a), create a new line, and add the asset as a covered level.

Note: Typically, invoices aren't generated for included warranty items.

Can I change Detailed Billing of an active subscription to Summarized Billing?

No, you can't. When a subscription becomes active the **Summarized Billing** field can't be edited.

How's currency assigned to an automatically created included warranty subscription contract?

An automatically created included warranty subscription contract is assigned the same currency value that's defined or entered in the ledger currency.

For example, if the ledger currency value is USD, the included warranty subscription will show the same currency (USD).

To change the currency in an included warranty subscription contract, you must change the ledger currency.

To change multiple currencies, see the article [How To Use Multi-Currency Pricing In Oracle Subscription Management \(Doc ID 2679478.1\)](#) on [My Oracle Support](#).

How do I import Subscription Management data using the FBDI template?

You can import subscription management data by importing data from external sources to interface tables and then importing them to production tables using the FBDI template.

Here are the high-level steps:

1. Organize your data in the FBDI spreadsheet import template.
2. Generate the CSV file.
3. Upload the CSV file to Oracle WebCenter Content.
4. Load data from Oracle WebCenter Content to interface tables.
5. Import data from item Management interface tables to item management production tables.

For detailed steps on using the FBDI template, see **Import Data using FBDI** in the Implementing Product Management guide on Oracle Help Center.

To know about importing subscription data using Import Management, see *How do I import subscription data?* in the Understanding Import and Export Management for Sales and Fusion Service guide on Oracle Help Center.

What's the role of Entitlement Precedence in Subscription Management?

Entitlement precedence decides which entitlement plan is assigned to a product.

When an entitlement plan is assigned to a product, the entitlement plan with the least precedence is assigned to the product by default.

For example:

Product A has an Entitlement Plan 1 with a Precedence of 20.

Product A has an Entitlement Plan 2 with a Precedence of 40.

In this case, when you create a subscription with Product A, entitlement plan 1 is assigned to the product.

You can assign an entitlement precedence on the **Manage Entitlement Plan Assignments** page in the application.

For more information, see **Coverage Entitlements** in the Using Subscription Management guide on Oracle Help Center.

How can I show extended warranty charges in a subscription product?

You can show extended warranty charges in the Subscription Management coverage templates to manage the warranty contracts that you sell to your customers.

Coverage items can be sold as separate items themselves, and you can set up pricing for these items as well.

Note: Before creating the coverage item, you must first set up the standard coverage you want to provide as a part of your coverage item.

Before creating standard coverage templates, be sure that you've defined these:

- **Business Processes:**
Business processes are an aggregation of service activities applicable for Depot Repair, Field Service, and so on.
- **Service Activities:**
Service Activities are the representation of the activities performed by a service technician, field service technician, the customer, or customer support executive, like labor activities, toll expense, parts return, and so on.
- **Time Zones**
- **Service Request Severity**
- **Billing Types:**
All Service Activities must be associated with a Billing Type. The Billing Type indicates which type of activity is performed, for example, labor, material charge, or expense.
- **Price Lists**
- **Adjustment Type**
- **Adjustment Basis**
- **Entitlement Type**

To create billing types and business processes, see the Getting Started with Service Logistics Cloud Implementation guide on Oracle Help Center.

1. Navigate to the **Subscription Configuration** work area.
2. Select **Standard Coverage** in the Entitlements Management section.
3. On the Manage Standard Coverage page, click **Create Standard Coverage**.
4. Enter template name, description, and start date.
5. Select an entitlement type.
6. Click **Save and Continue**.

To add entitlements:

1. On the Edit Standard Coverage page, select **Entitlement Rules**, and click **Actions > Add Row**.
2. Select the appropriate conditions from the Entitlement Rules section.

3. Select the appropriate result columns and click **Save**.

You can add more entitlement rules in the Entitlement Rules section.

The criteria in the Condition column are matched against the attributes of transactions, like a service request, and the application's Resolution Times and Reaction Times for the time zone are returned to the requesting application.

The requesting applications are Fusion Service (formerly B2B Service) and Service Logistics.

In the Entitlement Rules you can mention the following:

- Coverage Calendar: This is the Availability Calendar.
- Reaction Times: These define the amount of time by which an action must be initiated for a requested process. Reaction times are tied to severity.
- Resolution Times: These define a fixed time, according to the contract, by which normal operation should be restored. The Resolution Times are made available to other functions.

Note: You can edit the condition and result columns applicable for your entitlements by modifying the Subscriptions Entitlements Matrix Class.

The **Adjustments** tab in the Standard Coverage section lets you specify billing adjustments for work performed on covered products, for various business processes and service activities. The Subscription Management-Service Logistics integration uses these coverage adjustments to accurately determine service entitlements when a repair activity or field service activity is completed.

1. Navigate to the **Subscription Configuration** work area.
2. Select **Standard Coverage** in the Entitlements Management section.
3. On the Manage Standard Coverage page, click a template name you want to edit. Or, click **Create Standard Coverage** to create a new template.
4. On the edit or create page page, click the **Adjustments** tab
5. Select a business process from the **Business Process** drop-down list.
6. Select a service activity type from the **Service Activity** drop-down list.
7. Select a value from the **Billing Type** drop-down list. The values in this field are displayed based on your selection in the **Service Activity** drop-down list.
8. Select a value from the **Adjustment Type** drop-down list to add the markup or discount for the service activity.
9. Enter a percentage value in the **Value** field.
10. Select a value from the **Adjustment Basis** drop-down list.
11. Select the **Allow custom adjustments** check box to indicate if custom adjustments are allowed for standard coverage.
12. Enter the start and end date.
13. Click **Save and Close**.

Note: To support custom requirements for your implementation, you can extend standard coverages using Application Composer. Standard Coverage also is a REST-supported object.

What REST APIs do I use to create, amend, renew or terminate a subscription?

To create, amend, renew or terminate a subscription, see the Subscriptions REST Endpoints in the *REST API for Sales and Fusion Service in Oracle Fusion Cloud Customer Experience* guide.

Can I send subscription billing information to Accounts Receivables in parallel to multiple business units?

No, you can't send subscription billing information Accounts Receivables in parallel to multiple business units.

When you send billing data to Accounts Receivables in this way, the billing process updates multiple tables, and an invoice number is generated. However, when you run the job for another business unit, it gets blocked.

How do I create deep links in Subscription Management?

Deep links are links that point to another page. Deep links come in handy when you want to enable direct navigation into Oracle applications.

You can use deep links in Subscription Management to access a subscription or a subscription product without navigating through the subscription landing page. For example, you can create a deep link to a subscription, then copy and paste that link to an email message or notification. The recipient can use the link to directly access the subscription from the email or notification.

Subscription parameters used in deep links

To directly access a subscription using deep links, you can use:

- Subscription Number
- Subscription ID

To directly access a subscription product using deep links, you can use:

- Subscription Product ID
- Subscription Product PUID

Create Subscription Links

Here's the URL syntax you can use to construct a link to open a subscription:

```
https://{ServerURL}/fscmUI/faces/deeplink?objType=SUBSCRIPTION&objKey={ObjKey}%3D{ParameterID}&action=EDIT
```

1. Replace Server URL with the URL of your environment.
2. Replace ObjKey with either subscriptionNumber or subscriptionId.
3. Based on the selected ObjKey type, replace ParameterID with either subscription ID or number.

For Example:

- The URL for a link to open the subscription number Subs2401 might look like:

```
https://subscription.oracle.com/fscmUI/faces/deeplink?objType=SUBSCRIPTION&objKey=subscriptionNumber%3DSubs2401&action=EDIT
```

- The URL for a link to open subscription ID 700100177392474 might look like:

```
https://subscription.oracle.com/fscmUI/faces/deeplink?objType=SUBSCRIPTION&objKey=subscriptionId%3D700100177392474&action=EDIT
```

Create Subscription Product Links

Here's the URL syntax you can use to construct a link to open a subscription product:

```
https://{ServerURL}/fscmUI/faces/deeplink?objType=SUBSCRIPTION_PRODUCT&objKey={ObjKey}%3D{ParameterID}&action=EDIT
```

1. Replace Server URL with the URL of your environment.
2. Replace ObjKey with either subscriptionProductId or subscriptionProductPuid.
3. Based on the selected ObjKey type, replace ParameterID with either subscription product Id or PUID.

For Example:

- The URL for a link to open the subscription product ID 00100177392480 might look like:

```
https://subscription.oracle.com/fscmUI/faces/deeplink?objType=SUBSCRIPTION_PRODUCT&objKey=subscriptionProductId%3D00100177392480&action=EDIT
```

- The URL for a link to open subscription product PUID 700100177392474 might look like:

```
https://subscription.oracle.com/fscmUI/faces/deeplink?objType=SUBSCRIPTION_Product&objKey=subscriptionProductPuid%3D700100177392474&action=EDIT
```

What table should I use for Close Reason and Amendment Reason on the Subscription Product page?

For close reason and amendment reason, see the *OSS_SUBSCRIPTONS* and *OSS_PRODUCTS* tables in the Tables and Views for Sales and Fusion Service guide .

How to make pricing appear in a Subscription?

To make pricing appear in a subscription, you need to enter information about a business unit, legal entity, subscription profile and the primary party or customer, when you create a subscription. When you add the subscription lines, pricing information is retrieved automatically in the **Pricing** tab of the respective product.

For more information on pricing setup, see the article [Subscription Management Pricing Setup Requirements \(Doc ID 2770185.1\)](#).

How can I restrict the creation of another subscription when an active subscription already exists for a covered asset?

To restrict the creation of a second subscription when an active subscription already exists:

1. Navigate to the Subscription Management work area.
2. Select the gear icon (Subscription Configuration).
3. Select the **Manage Subscription Validations** task.
4. Select the appropriate rule from the predefined set of rules and save the configuration.

How do I show the preventive maintenance tab in the standard coverage template?

The preventive maintenance tab is for associating the maintenance program template to the standard coverage in Subscription Management. This maintenance program is converted to one or more work orders and service requests in the downstream applications to support the preventive maintenance for the covered levels.

For the preventive maintenance tab to show in subscriptions, the administrator or implementor must define a subtype for the program template. This subtype should be defined in the look up type `ORA_MNT_MX_PROGRAM_SUB_TYPE` and the look up code should be `OSS_PROGRAM_TEMPLATE`. Once the subtype is defined, it should show the program templates when trying to associate the maintenance program template to the standard coverage.

If a subscription product is scheduled to be closed at a future date but is renewed before that date, does the renewal line get terminated at the scheduled future date?

No, the renewal line of a product doesn't get terminated at a scheduled future date when the product is scheduled to be terminated or closed.

A renewed subscription is self sustained and isn't affected by its previous version. To know more about relationship subtabs between source and renewed subscriptions, see how do I automatically or manually renew Subscriptions?

How can I synchronize the asset status of a product with an updated installed base asset?

Subscription Management integrates with Oracle Asset Lifecycle Management to manage changes made to an installed base asset. For example when an asset is returned, expired, or transferred.

When assets change, included warranties and coverage lines must reflect such changes. For example, there can't be an active included warranty for an asset that's been returned. The applications start specific asset transactions that update the included warranties and coverage lines.

Subscription rule Asset Lifecycle Management settings decide how the applications change the impacted subscription contracts for installed base updates or asset transactions.

To set the rules:

1. Sign in as a setup user.
2. Navigate to the **Subscription Configuration** work area.
3. On the Subscription Configuration page, click the **Subscription Configuration** tab.
4. Click **Manage Subscription Rules**.
5. Click **Asset Lifecycle Management**.
6. Select the Common Rules:
 - o The **Close Reason** is the default close reason when a covered asset line is closed.
 - o The **Cancellation Reason** is the default cancellation reason when a covered asset line is canceled.
 - o The **Transfer** option specifies the covered asset line change that happens when an asset is transferred.
 - o The **Termination Credit Method** is the default credit method used when covered asset lines are terminated.
7. Select the covered asset line change for included warranties and coverage lines when an asset is transferred.
8. Save your changes.

This table explains the various asset lifecycle transactions, the asset transaction updates that they trigger, and the synchronization behavior with Subscription Management.

Asset Change	Asset Transaction Type	Impact on Asset Transaction Updates for Included Warranty/Coverage Line	Impact on Revenue Contract in Oracle Revenue Management Cloud
An asset is expired in Installed Base/Asset Lifecycle Management	Customer Asset Expiration	<p>Asset transactions are visible in Reprocess Installed Base Updates in Pending status.</p> <p>Covered asset lines are closed on the included warranty/coverage subscription line.</p> <p>Closed Date is the customer end date of the asset (expiration date), plus 1 day.</p> <p>Close credit, close, and cancel reasons are set according to the Manage Subscription Rules > Asset Lifecycle Management tab settings.</p>	Material revision of the associated revenue contract is initiated.
An asset is reinstated in Installed Base	Customer Asset Reinstatement	<p>Asset transactions are visible in Reprocess Installed Base Updates in Pending status for Included Warranties only.</p> <p>Asset transactions update only included warranties. As a result of customer asset reinstatement, covered asset line status becomes Active or Expired, depending on whether the covered asset end date is in the future or past, respectively.</p> <p>Extended Warranties aren't reinstated.</p>	No impact
An asset is returned to the supplier	Customer asset return	<p>Asset transactions are visible in Reprocess Installed Base Updates in Pending status.</p> <p>Covered asset lines are closed for included warranties and coverage subscription lines.</p> <p>Closed Date will be the customer end date of asset (expiration date), plus 1 day</p> <p>Close credit, close, and cancel reasons are set according to the Manage Subscription Rules > Asset Lifecycle Management tab settings.</p>	Material revision of the associated revenue contract will be initiated
An asset is transferred to another customer	Customer asset transfer	<p>Asset transactions are visible in Reprocess Installed Base Updates in Pending status.</p> <p>The impact of the asset transaction update on included warranties and coverage subscription lines</p>	<p>Material revision of the associated revenue contract is initiated for the terminated line.</p> <p>A new revenue contract is created for the new coverage subscription,</p>

		<p>is determined by the Transfer option selected in the Manage Subscription Rules > Asset Lifecycle Management tab.</p> <p>If the transfer option is Transfer:</p> <p>The applicable covered asset lines are closed. New covered asset lines are created for the new customer for the remaining duration, starting from transfer date plus 1 day.</p> <p>If the transfer option is Terminal:</p> <p>The applicable covered asset line is closed as of asset transfer date plus 1 day.</p> <p>Close credit, close, and cancel reasons are set according to the Manage Subscription Rules > Asset Lifecycle Management tab settings.</p> <p>If the transfer option is Do Not Change or if no transfer option is selected, included warranties and coverage lines are updated.</p>	<p>covering the transferred covered asset.</p>
<p>An asset under warranty is returned due to fault, and the supplier initiates a replacement by shipping a new asset</p>	<p>Customer Asset Replacement</p>	<p>Asset transactions are visible in Reprocess Installed Base Updates in Pending status for Included Warranties only.</p> <p>The applicable covered assets are terminated on the replacement date plus 1 day.</p> <p>A new covered level is created for the replacement asset, starting the replacement date, plus 1 day, until till the original covered asset end date.</p> <p>Extended Warranties aren't replaced.</p>	<p>No impact</p>

How do I tell if subscription lines have been processed to Revenue Management?

When a sales order is created or processed and pushed to Revenue Management, a contract is created with a particular version, say version 1, of the revenue line. After sales order fulfillment, all order lines are processed to Subscription Management and corresponding subscriptions are created, and a contract is created with the lines of version 1.

These subscription are then processed to Revenue Management, which creates an updated version of the original Order Management lines for the same contract.

To make sure if the revenue lines are pushed to Revenue Management, check the PROCESSED_FLAG column in the database tables OSS_RMCS_DOC_T, OSS_RMCS_DOC_LINES_T and OSS_RMCS_DOC_SUB_LINES_T.

Subscription Management pushes the revenue lines to Revenue Management's Vendor Relationship Management (VRM) tables and revenue contracts are generated based on these revenue lines.

How do I pause subscription billing at multiple levels in a subscription?

You can pause or skip subscription billing or charge lines to be sent to Revenue Management by using certain algorithms configured specifically for billing.

For more information see the article [How To Skip Subscription Charge Lines To Be Sent To RMCS From Subscription Management? \(Doc ID 2665162.1\)](#), on My Oracle Support.

Can I configure a specific price list for a customer?

Yes, you can configure price lists specifically for a customer by using pricing profiles and segments.

Before defining pricing for a customer, you must set up a pricing strategy for a subscription. The pricing strategy of the subscription is then retrieved when the Business Unit, Legal Entity, Contract Type, Number and Primary Party are entered during subscription creation.

When you add subscription lines, the pricing information is retrieved automatically.

Oracle Subscription Management supports:

- One-time charges, such as activation fees.
- Recurring charges, such as monthly membership charges.
- Usage-based charges, such as monthly cloud storage consumption fee.

The application identifies all the usage-based charges that you define using the charge prefix. You can configure this prefix using the profile option OSS_USAGE_CHARGE_IDENTIFIER.

Use this high-level procedure for quick setup of pricing lines, after your full pricing setups are done in Oracle Supply Chain Management (SCM) Cloud. See the related topics for additional details.

1. Sign in to the application with access to pricing administration.
2. Navigate to the **Pricing Administration** work area.
3. In the Pricing Rules tab, open the price list to which this item is associated.
4. Create a price list line for a coverage item. Click **Associated Items** to define unit price and percent price based on covered items.
5. Enter the recurring price details of the item.
6. Create a price list line for a subscription item.

7. Create different charges such as a one-time setup fee, recurring flat monthly fee, or recurring usage-based fee. Here's a summary of the steps that you need to perform to set up pricing.

Setup	Where you find more information
Create a customer.	The Create and Manage Customers topic in the Subscription Management Setup Checklist chapter
Set up pricing charge definition, charge types, and charge subtypes.	The Manage Pricing Charge Definitions topic in Administering Pricing guide.
Create pricing segment.	The Manage Pricing Segments topic in Administering Pricing guide.
Create customer pricing profile.	The Manage Pricing Profiles topic in Administering Pricing guide.
Create subscription, coverage, and covered asset items.	The Pricing for Covered Items topic in Administering Pricing guide.
Create and approve price lists.	The Manage Price Lists topic in Administering Pricing guide.
Add items to price lists and add one-time, recurring, and usage charges.	
Create a pricing strategy. Add price lists with items and charges. Approve pricing strategy.	Manage Pricing Guidelines topic in Administering Pricing guide.
Assign a pricing segment and pricing profile to a relevant pricing strategy.	The Strategies topic in Administering Pricing guide.
For auto adjustments, go to Manage Discount Lists and create a new Discount List, add items with auto adjustment rules and approve. Add Discount List to pricing strategy that's being used.	The Manage Discount Lists topic in Administering Pricing guide.

For details, see the Oracle Supply Chain Management Cloud, Administering Pricing guide.

