Subscription Cancellations Blueprint

What is this document | Accounting Seed is a flexible accounting platform where you can add, build and layer your own customizations on top of the platform. Accounting Seed Blueprints provide an example of a specific use case that can serve as a template to implement a feature for your organization, but also can be tweaked or modified in any way you need to achieve your exact requirements. Blueprints serve as a design template or starting spot for your own feature.

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What is the feature?

In Accounting Seed customer subscriptions are tracked on the recurring billing object. A recurring billing can be created directly from the Opportunity. The purpose of this article is to automatically set the recurring billing to cancel at a future date and alert the respective salesperson of the upcoming cancellation for consultation with the customer with regards to renewal.

When is this feature set used?

This is used to help automate subscription cancellations and renewals.

What terms or definitions do I need to understand?

Recurring Subscriptions	There is an agreement/contract between you and your customer to charge them over specified intervals.
Recurring Billings	Synonymous with recurring subscriptions.
Alert Date	Date the salesperson is alerted to the upcoming cancellation. Typically set 30 or more days prior to the end date.
End Date	The date the subscription is scheduled to end.

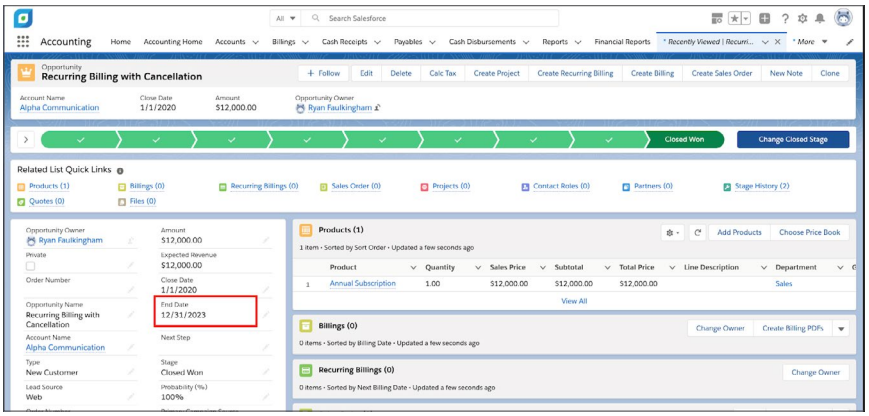
Can you give me an overview of how this works?

As a Recurring Billing record is created from an Opportunity, the system will populate the end date with the contract termination date. It will also send an alert with a specified number of days to the related sales rep prior to the end date so the assigned rep can consult with the customer with regards to renewal. This automation is created as a daily job that will inactivate the recurring billing when today's date equals the end date. On this day the system will update the status on the recurring billing from active to inactive so that no more billings are created.

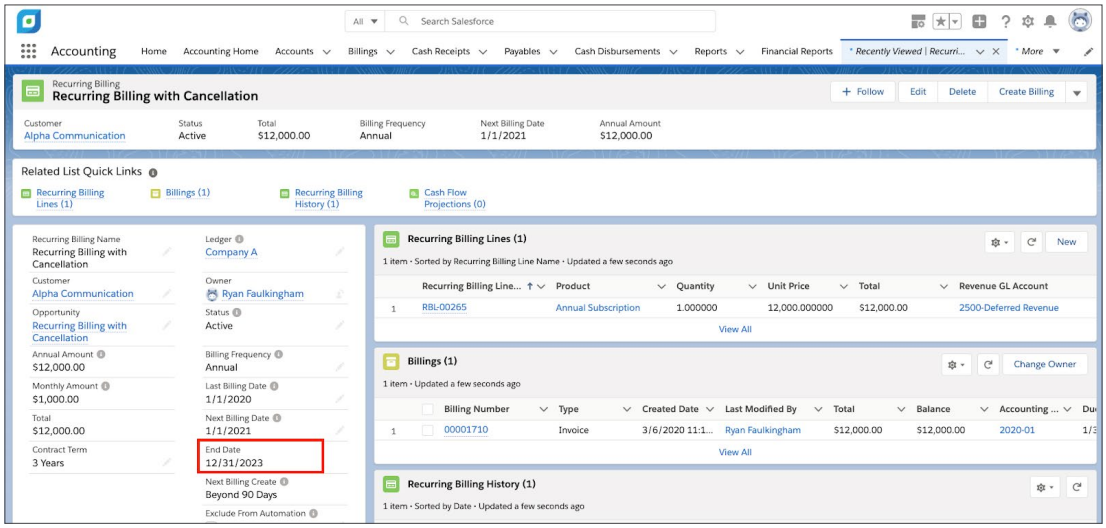
What object model changes are required?

Object model changes are additional data objects or fields that you would add to Accounting Seed to achieve the customization. We suggest the following changes:

On the Opportunity, add a date field to key in the End Date of the contract:



On the Recurring Billing object, add a formula field named “End Date” to pull through the End Date from the Opportunity:



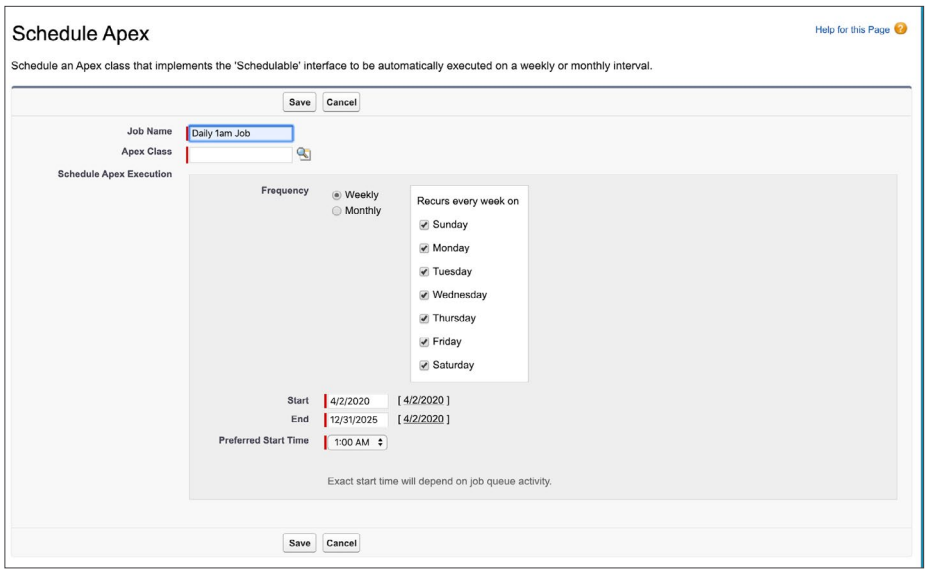
What code is needed for this process?

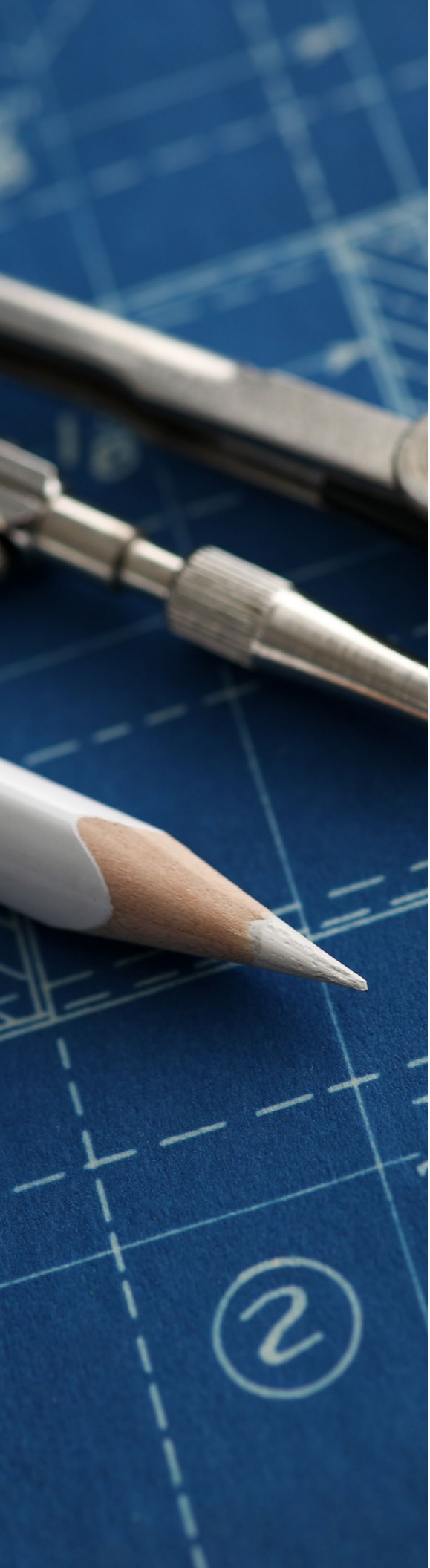
Accounting Seed recommends creating an asynchronous scheduled job to create a task for the Sales rep 30 days prior to the end of the subscription for follow up to the customer for renewal and automatically mark recurring billings as inactive when they reach their end date. The logic for the job is detailed out below:

To create a task for the sales rep
Select all Recurring billing records where:
Status = Active AND
End date = Today() +30
Create a task for the owner of the recurring billing to follow up for renewal

To automatically terminate the subscription
Select all Recurring billing records where:
Status = Active AND
End date = Today()
Update Recurring Billing Status to Inactive

The screen below shows the interface for setting up the scheduled Apex Job.





What does a successful outcome look like?

A user will be able to set up Recurring Billings with end dates to help automate the cancellation process and avoid overcharging their customers. They will also receive alerts to help with the renewal process.

What process or policy changes should I consider with implementing this solution?

1. Training the sales reps to use the end date on the opportunity.
2. Training the sales reps to follow up with the customer as they receive renewal alerts.
3. The scheduled job for automatically terminating subscription should be run prior to the standard Accounting Seed billing routine.

About Accounting Seed

Accounting Seed is a modern, robust accounting platform powered by the Salesforce platform. We're committed to breaking down silos and building connections in order to take your business to the next level. Schedule a free demo here or contact us today to begin our conversation.

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