Subscription Management

User Guide · Odoo 18 / 19

Subscriptions & Recurring

Technical module name: gb_subscription_management
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Table of Contents

1. Overview
2. Installation
3. Configuration
4. Step-by-step Walkthrough
5. Feature Reference
6. Tips, Troubleshooting & FAQ
7. Support

1. Overview

Odoo's Subscriptions app is Enterprise-only. This module brings a full subscription engine to Community: recurring plans, automatic invoice generation, upgrades and downgrades with proration, and MRR/ARR and churn analytics.

Subscriptions are built from plans and lines, run on a recurring cycle, and generate invoices automatically. Every change in recurring revenue is captured in an MRR movement log so you can see new, expansion, contraction and churned revenue.

Who is it for?

- SaaS and services businesses billing recurring revenue
- Finance teams tracking MRR / ARR and churn
- Community users who need subscriptions without Enterprise

2. Installation

The module is delivered as a standard Odoo application and installs cleanly on both Odoo 18 and Odoo 19 Community or Enterprise.

Step	Action
1	Enable developer/apps — Log in as an administrator and open the Apps menu.
2	Update the app list — Click Update Apps List so Odoo picks up newly added modules.
3	Search — Search for "Subscription Management" (technical name gb_subscription_management).
4	Install — Press Install. Required dependencies (sale_management, account) are installed automatically.

After installation a new top-level menu, Subscriptions, appears in the main menu bar.

3. Configuration

Open Subscriptions ▸ Configuration ▸ Plans and define your recurring plans (products, recurrence, pricing). Plans drive the lines on each subscription.

Create subscriptions from plans; each subscription has lines, a billing cycle and a draft → running → closed lifecycle.

Key configuration records

Field	Description
Subscription Plan	A reusable recurring offer (product, recurrence, price) used to build subscriptions.
Subscription	A customer's running agreement with lines, cycle and state.
Subscription Line	A single recurring product/charge on a subscription.
MRR Movement Log	Records each change to recurring revenue (new, expansion, contraction, churn).

4. Step-by-step Walkthrough

A subscription runs Draft → Running → Closed, and can be Paused:

Step	Action
1	Create plans — Define the recurring plans under Configuration.
2	Create a subscription — Add the customer and lines from a plan.
3	Start — Press Start to activate the subscription (Running).
4	Generate invoices — Invoices are generated on the cycle; use Generate Invoice to bill the current period.
5	Upgrade / downgrade — Change lines mid-cycle; proration adjusts the charge and an MRR movement is logged.
6	Pause / resume — Pause a subscription and resume later as needed.
7	Close — Press Close to end the subscription; churn is recorded in the MRR log.
8	Review MRR — Open MRR Analysis to see recurring-revenue movements.

Status flow

Records move through the following statuses:

- Subscription: Draft → Running → Closed (Pause / Reset to Draft available)

5. Feature Reference

Recurring plans

Reusable plans define the product, recurrence and price that subscriptions are built from.

Automatic invoicing

Subscriptions generate invoices on their billing cycle so recurring revenue is billed without re-keying.

Upgrades & downgrades with proration

Mid-cycle changes are prorated and reflected in the next invoice.

MRR / ARR analytics

The MRR movement log captures new, expansion, contraction and churned revenue for MRR/ARR reporting.

Churn tracking

Closing a subscription records the churn so you can measure retention.

Per-customer view

Each customer shows their subscriptions for an at-a-glance account picture.

6. Tips, Troubleshooting & FAQ

Q: Do I need Enterprise?
A: No — this delivers subscriptions on Community. It depends on Sales and Accounting.

Q: How are invoices raised?
A: On the subscription's billing cycle; Generate Invoice bills the current period and links it to the subscription.

Q: How is proration handled?
A: Upgrades/downgrades mid-cycle are prorated and the adjustment flows into the next invoice and the MRR log.

Q: Where do I see MRR?
A: MRR Analysis aggregates the movement log into new, expansion, contraction and churn.

Q: Can I pause a subscription?
A: Yes — Pause holds billing; resume to continue, or Close to end it.

Q: What counts as churn?
A: Closing a running subscription records a churn movement in the MRR log.

7. Support

We are glad to help you get the most out of Subscription Management.

- Email: support@pokutsoft.com
- Apps & documentation: https://pokutsoft.com
- Please include your Odoo version (18 or 19) and the module version (18.0.1.0.0) when contacting support.

This module performs format generation and in-Odoo bookkeeping only. Where a third party (HMRC, a pension provider, a payroll bureau, a bank) is involved, the customer uses their own credentials/account to file or transmit. No filing is done on your behalf.