

# Steve Rubenstein's Recurring Billing Integration Manual

Version 1.1

Last Updated October 15, 2013

This document covers the various aspects required to integrate the billing system into your operations. This document applies both to software and hosted customers.

The system provides a comprehensive web services interface which enables you to perform all core functions necessary for integration and day-to-day usage. All functions available via web services may also be accomplished via the browser-based interface. However, some web services functions combine several browser-based screens into a single function.

There are 5 primary steps necessary to integrate the billing system with your system:

1. Importing existing customers
2. Adding new customers
3. Updating existing customers
4. Variable-quantity subscriptions
5. Exporting data

## 1. Importing Existing Customers

In most instances, customers will already have existing customers, meaning those customers and their products must be entered into the system. More importantly, the transition must be handled in a seamless manner without mistakes.

Importing customers includes inserting the following primary information:

- Company – custom fields, groups, custom status
- User(s) – custom fields, groups, custom status
- Subscriber(s) – payment method, notification, processing method
- Subscriptions – parameters, custom prices
- Address(es) & phone number(s)
- Bank and credit card information
- Salesperson(s)

All primary information can be inserted via the web services interface.

Secondary information includes:

- Notes

- Contact management
- Historical invoices
- Historical payments
- Historical sales commissions

The web services interface does not currently support inserting notes, contact management entries, or payments. It can be used for inserting previous invoices, but it is not expecting those invoices to have been closed on an earlier date. The closing date is automatically set as the date the invoice is marked as closed. You cannot manually set the closing date. Sales commissions can be inserted manually, but only via the browser.

If necessary, it is possible to import this data via a custom script.

The primary web services functions that will be used for import include:

- `insertCompany_extended` – once for each customer
- `insertUser_extended` – once for each user; if only one and no user-specific values for custom fields, custom status, groups, address or phone, can use `insertCompany_extended` instead
- `insertSubscriber` – if only one, can use `insertCompany_extended` instead
- `insertSubscription` – once for each customer subscription
- `insertCommissionCustomer` – once for each customer salesperson

These web services functions are defined in detail in the Billing Web Services Manual.

## **2. Adding New Customers**

Inserting new customers is generally the same process as importing, except that it can be done in real time via web services as opposed to en masse like the initial import. The process for integrating this into your system will vary based on how customers are created in your own system.

It is not necessary that the web services requests to add a new customer be sent in rapid succession. The process can be split into the same steps used on your own system. You simply send the appropriate web services request to the billing system at each step in the process.

### **3. Updating Existing Customers**

Updating an existing customer is not significantly different than inserting a customer. Again, the web services manual provides complete documentation on how to update all customer information. In general, wherever information is updated in your system (either via your employees or by customers directly), in the same code where you update your database, you simply need to add a web services request to update the corresponding data in the billing system.

### **4. Variable-Quantity Subscriptions**

A variable-quantity subscription refers to a product that the customer is “subscribed” to, meaning they automatically purchase that product or service in each billing period, e.g., wireless phone service. A subscription can either be a fixed quantity, e.g., your cable bill, or the quantity could vary with each month, e.g., your wireless or long distance minutes.

For each billing period, a subscriber (e.g., a customer with subscriptions) cannot be processed until all the quantities for all variable-quantity subscriptions for that billing period have been entered either manually via the browser or submitted via web services. If the subscriber has no variable-quantity subscriptions, then the subscriber is automatically processed.

This is the one function in the billing system where you must build an automated capability in your system. Each variable-quantity subscription must be submitted a separate web services request. For companies that currently manually determine variable quantities or manually generate invoices, this will require writing a script to calculate the quantity for each subscription and then submitted these to the billing system.

### **5. Exporting Data**

Data can be exported from the system via the browser-based screens or via web services. Browser-based export options can be customized via the Setup area to use your field names instead of the default field names. This method has not been implemented via web services though.

For both web services and browser-based export, the process is simply selecting data. When exporting via the browser, you may select from XML, tab-delimited or Excel file. The difference between tab-delimited and Excel export is that the first row in the tab-delimited export file is the field name and the Excel file has a text column header. The tab-delimited file also has data as it is returned from the database, as does the web services interface. The Excel file however translates the data into meaningful text. In other words, the tab-delimited file is intended for data import and the Excel file is designed to be read and analyzed by humans.