Managing Demo And Subscription Data

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Understand How Demo Data, Plans, Subscribers, and Invoices Connect

Pams keeps demo data and live subscription administration records separate in purpose, even though you may review them in the same administration areas. Demo data gives you sample **Subscription Plans**, **Subscriber Features**, **Subscribers**, and **Subscription Invoices** that you can use to understand how subscription records appear and relate to one another. Use these records for testing and familiarization, not for operational billing or subscriber administration.

The live subscription flow begins with a **Subscription Plan**. A plan defines the subscription offering that can be assigned to a subscriber. **Subscriber Features** describe the individual capabilities that are included in a plan or made available for a particular subscriber. A **Subscriber** receives a plan and may also have subscriber-specific feature access. **Subscription Invoices** record charges associated with the subscriber's subscription arrangement.

Before changing any subscription record, review the related records that may be affected:

- The current **Subscription Plan** and the features attached to it.
- Subscriber records using that plan.
- Subscriber-specific features that differ from the standard plan.
- Existing **Subscription Invoices**, especially invoices that still need review.
- Demo records that may look similar to live records.

Changes to a shared plan or feature can affect more than one subscriber. For example, changing the features available through a plan may change what administrators expect to see for every subscriber assigned to that plan. Similarly, renaming or withdrawing a subscriber feature can make existing plan assignments harder to interpret unless you first check where that feature is used.

[SCREENSHOT: Subscription administration records showing the relationship between a Subscription Plan, Subscriber Features, a Subscriber, and Subscription

Invoices]

Keep subscription access records focused on the subscriber's current arrangement. Keep subscription invoices focused on billing history. Do not treat sample invoice records as evidence of a real charge, payment, or active subscriber relationship.

If your organization also uses custom layouts to control which details are visible on administration records, review Managing Default Layouts before making broad changes to subscription screens.

Load, Review, and Remove Demo Data

Use **Manage demo data** in Pams when you need sample subscription records for testing or training. Loading demo data can provide sample **Subscription Plans**, **Subscriber Features**, **Subscribers**, and **Subscription Invoices** so you can review the expected relationship between plan access and billing records without changing live subscriber arrangements.

1. Open **Manage demo data** in **Configuration**.
2. Choose the available option to load demo data.
3. Wait for Pams to create the sample records.
4. Open the relevant subscription administration areas and review the created sample plans, features, subscribers, and invoices.
5. Compare the sample subscriber's plan with the subscriber features shown for that record.
6. Open the related **Subscription Invoices** to see how invoice details are displayed for a sample subscriber.

When reviewing demo records, identify the naming, description, or status information that Pams displays on the records in your environment. Use those visible details to distinguish sample records from operational records before editing, assigning, or removing anything. Do not assume that a sample subscriber is a live customer or that a demo subscription invoice represents a real amount due.

Demo data is useful for checking practical scenarios, such as:

- Whether a plan shows the expected subscriber features.
- How an individual subscriber can have access that differs from a standard plan.
- How subscription invoice details appear beside subscriber information.
- Whether layouts and labels make plan, feature, and invoice details easy to review.

When testing is complete, return to **Manage demo data** and use the available removal or reset option. Before removing demo records, open the related subscriber and subscription invoice records to confirm they are sample records. Remove related demo subscriptions and invoices together where Pams presents them as connected records, so sample billing history does not remain mixed with live records.

[SCREENSHOT: Manage demo data screen with sample subscription records available for review or removal]

Create and Maintain Subscription Plans

A **Subscription Plan** gives Pams a consistent definition of the access package you assign to subscribers. Create plans when you need a named subscription offering with a defined collection of **Subscriber Features**. Keep each plan clear enough that another administrator can understand what a subscriber receives by reviewing the plan record.

1. Open **Subscription Plans**.
2. Create a new plan record using the option available on the screen.
3. Enter the plan information shown on the form so the plan can be identified clearly in subscriber administration.
4. Review the available **Subscriber Features** and add the features that belong to this plan.
5. Check that the plan represents one defined offering rather than a mixture of unrelated access arrangements.
6. Select **Save** or **Save and Close** when the plan details and feature list are correct.

Before updating an existing plan, review the subscribers currently associated with it. A change to a plan’s available features may affect how administrators interpret access for all subscribers assigned to that plan. If a plan is being revised rather than replaced, document the intended change in the plan’s visible information where the form provides a suitable description or note field.

Use separate plans when the subscriber offerings are genuinely different. Avoid creating nearly identical plans simply to handle one subscriber’s exception. Where an individual subscriber needs additional or different access, manage that through the subscriber’s specific feature assignments instead of changing the standard plan for everyone.

When a plan is no longer available for new subscribers, stop assigning it. Before removing or archiving a plan, review:

- Subscribers still assigned to the plan.
- Subscriber features included in the plan.
- Subscription invoices that refer to subscribers using that plan.
- Whether the plan information is needed to interpret historical subscriber or invoice records.

Preserve enough visible plan information to understand previous subscription arrangements. Removing a plan too early can make historical subscription invoices difficult to review accurately.

[SCREENSHOT: Subscription Plan record with plan information and assigned Subscriber Features]

Define Features Available to Subscribers

Subscriber Features represent the individual capabilities that can be made available through a **Subscription Plan** or assigned directly to a specific subscriber. Use feature records to keep subscription access structured and understandable. Each feature should represent one distinct capability, not a broad or unclear collection of unrelated access.

1. Open **Subscriber Features**.
2. Search the existing feature list before creating a new record.
3. Create a feature only when an equivalent feature does not already exist.
4. Enter the feature information shown on the record so administrators can recognize its purpose.
5. Review where the feature can be assigned, including the relevant **Subscription Plans** or individual **Subscribers**.
6. Select **Save** or **Save and Close** after checking the feature details.

Before adding a feature to a plan, confirm that the feature belongs in the standard subscription offering. A feature included in a plan may become available to every subscriber using that plan. If only one subscriber needs the capability, use that subscriber’s feature assignments instead of adding it to the shared plan.

When a capability changes, review the existing feature record before creating a replacement. Update the feature definition if the change is only a clearer name or description. If the capability is being replaced or withdrawn, first identify all plans and subscribers that use it. Then update those records deliberately so no subscriber is left with unclear access.

Use the visible feature list as a control point for consistency:

- Search for similar names before adding a new feature.
- Avoid duplicate records with slightly different wording.
- Check plan assignments after changing a feature.
- Check individual subscribers who have feature access outside their assigned plan.

[SCREENSHOT: Subscriber Features list showing feature names and their related plan or subscriber assignments]

A clean feature list makes subscription access easier to administer and makes invoice reviews easier when you need to understand why a subscriber has a particular plan or exception.

Add Subscribers and Manage Their Plan Access

Use **Subscribers** to connect an account with the appropriate **Subscription Plan** and any subscriber-specific features. The subscriber record is the place to review the subscription arrangement for one account before you make changes to access or investigate a subscription invoice.

1. Open **Subscribers**.
2. Create a subscriber record using the option available on the screen.
3. Complete the subscriber information shown on the form.
4. Select the appropriate **Subscription Plan** for the subscriber.
5. Review the features made available through the selected plan.
6. Add subscriber-specific features only when the subscriber requires access that differs from the standard plan.
7. Select **Save** or **Save and Close**.

After saving, reopen the subscriber record and verify that the selected plan and visible feature assignments match the intended subscription arrangement. This review is important when the subscriber has an exception, such as additional access not included in the plan or access that should not be provided through the standard plan.

When a subscriber changes subscription level, update the plan assignment first. Then review subscriber-specific features. Features that were appropriate under the previous plan may no longer be needed after an upgrade or downgrade. Remove or adjust only the individual feature assignments that no longer apply; do not change the shared plan simply to resolve one subscriber's exception.

Use the subscriber record to manage changes such as:

- Moving the subscriber to a different plan.
- Adding access that is not part of the standard plan.
- Removing an individual exception when it is no longer required.
- Pausing or ending plan access when the subscription is no longer needed.

Before removing access, open the subscriber's **Subscription Invoices** and review the visible billing history. Subscriber access and historical billing records serve different purposes. Do not remove or alter invoice history just because the subscriber's current plan changes.

[SCREENSHOT: Subscriber record showing the selected Subscription Plan and subscriber-specific feature assignments]

Review and Administer Subscription Invoices

Use **Subscription Invoices** to review charges recorded for a subscriber's subscription arrangement. Start from the subscriber's billing records when you need to investigate a specific account, or open **Subscription Invoices** when you need to review invoices across multiple subscribers.

1. Open the subscriber record and locate its billing records, or open **Subscription Invoices** directly.
2. Select the subscription invoice you need to review.
3. Confirm the subscriber shown on the invoice.
4. Check the associated subscription plan against the subscriber's current or recorded subscription arrangement.
5. Review the invoice details alongside the subscriber's assigned features.
6. Check the invoice **Status** and the other visible record details to determine whether it still requires attention.
7. Save changes only after confirming that the invoice remains connected to the intended subscriber and plan.

When reviewing a charge, compare the subscription invoice with the subscriber record rather than relying on the invoice alone. Check whether the subscriber has the expected plan and whether subscriber-specific features explain an exception to the standard plan. If the charge appears unexpected, do not change the invoice immediately. First verify whether the issue is caused by an incorrect plan assignment, an unnecessary individual feature, or a demo record mistaken for a live record.

Use the invoice status and payment-related details shown on the record to separate invoices that require follow-up from those already finalized or settled. Do not treat an old invoice date by itself as proof that an invoice is complete or no longer relevant.

After you change a subscriber's plan or features, review the billing records again. Historical invoices should continue to reflect the recorded billing history, while the subscriber record should show the current access arrangement. Keeping these records distinct helps administrators explain both current subscription access and previous charges.

[SCREENSHOT: Subscription Invoice record showing subscriber, plan-related details, invoice amount, and Status]

Fix Common Plan, Feature, and Invoice Data Issues

Most subscription data issues can be resolved by checking the relationship between the **Subscriber**, the selected **Subscription Plan**, the assigned **Subscriber Features**, and the related **Subscription Invoices**. Review these records in that order before making broad changes.

1. If a subscriber is missing an expected capability, open the subscriber record and confirm the selected **Subscription Plan**.
2. Open that plan and check whether the expected **Subscriber Feature** is included.
3. Return to the subscriber record and review any subscriber-specific feature assignments that may add, replace, or remove access from the standard plan.
4. Save only the change needed to correct the subscriber's access.

For an incorrect subscription charge, work from the invoice back to the subscriber record:

1. Open the relevant **Subscription Invoice**.
2. Confirm the subscriber associated with the invoice.
3. Review the subscriber's selected plan.
4. Check the subscriber's enabled features, including individual exceptions.
5. Compare these details with the invoice information before changing any subscription record.

If you find duplicate, confusing, or test-related records, first check whether they came from **Manage demo data**. Review the connected subscribers and subscription invoices before removing a record. A sample plan may have sample subscribers and invoices attached to it; deleting only one of those records can leave misleading test data behind.

Unexpected plan changes require a broader review. Check the subscriber record, then the plan definition, then the feature list. Look for visible **Last Modified**, **Last Modification On**, or **Last Modification By** details where Pams shows them. These details can help you identify whether the issue began with a subscriber change, a plan update, or a feature update.

Avoid resolving access issues by creating duplicate plans or duplicate features. Correct the existing record when it represents the same subscription arrangement, and create a new record only when the offering or capability is truly different.

[SCREENSHOT: Example review path from a Subscription Invoice to its Subscriber, Subscription Plan, and Subscriber Features]

Overview

Subscription administration in Pams depends on keeping four record types aligned: **Subscription Plans**, **Subscriber Features**, **Subscribers**, and **Subscription Invoices**. Plans define standard subscription offerings. Features identify the capabilities included in those offerings or granted as individual exceptions. Subscriber records show the current access arrangement for each account. Subscription invoices provide the billing history connected to those arrangements.

Use **Manage demo data** only for sample records and controlled testing. Demo plans, features, subscribers, and invoices can help administrators understand how the subscription records appear in Pams, but they must not be used as operational billing data. Before removing demo data, review related subscriber and subscription invoice records so sample data is not confused with live information.

For routine administration, start with the subscriber’s assigned plan, then review subscriber-specific features. This order prevents unnecessary changes to shared plans when only one subscriber needs different access. Before changing a plan or feature, check the subscribers currently using it. Shared records can affect multiple subscriber arrangements and may also affect how administrators interpret historical invoice records.

When reviewing charges, open the **Subscription Invoice** and compare it with the subscriber’s selected plan and enabled features. Use the invoice **Status** and visible record details to identify invoices that need attention. Keep current access changes on the subscriber record, while preserving invoice history as the record of past charges.

For subscription screens that need clearer labels, sections, or visible fields, use the layout guidance in Managing Default Layouts.