

NetSuite IBR Activation Sales Order (ASO) Automation

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To improve efficiency and reduce manual processing, an Activation Sales Order (ASO) will now be created automatically when a device is activated through an IBR in NetSuite. This enhancement simplifies the activation process while helping to ensure transactions are created consistently and accurately.

This process applies to all activations including WeatherTRAK controllers, WaterCompass devices, and HPM Assets.

Process Guidelines and Recommendations

When an IBR is activated in NetSuite

Continue to follow the existing [NetSuite Device Activation](#) process.

- Complete and save the IBR as you do today, including updating the Activation Status to Active and marking the *Ready to Create Activation Sales Order* field checked/true.
- For activations completed via CSV import, the same automation will occur provided the imported data updates the Activation Status to Active and marks the *Ready to Create Activation Sales Order* field checked/true.
- No additional steps are required to create the Activation Sales Order.
- After the IBR activation is complete, allow ~2 minutes for the automation to generate the Activation Sales Order.
- Confirm that the Activation Sales Order has been created successfully before proceeding with any downstream activities.
- If the Activation Sales Order is not created within ~2 minutes, review the IBR and device information for completeness and accuracy before contacting CRM/ERP Help.

If An ASO initially fails

There is no longer an “Activation Sales Order” button to press — the order is created automatically when you save the IBR. To try again after a failure, correct the information and save the IBR again, following these steps in order:

- **Step 1 – Read the red message at the top of the IBR.** It always states the specific reason after “Error Message: ...”. Do not skip this as it tells you exactly what to fix, and you will be asked for it if you need help later.
- **Step 2 – Correct the information it identifies.** Use the list of reasons below to find the field to fix. For example, enter the Original Sales Order, set the Subscription Line ID, or confirm the subscription line still exists on the sales order.
- **Step 3 – Make sure “Ready to Create Activation Sales Order” is checked.** After a failed attempt, this box may have cleared itself. If it is unchecked, check it again. If it is already checked, uncheck it, save, then check it again. This is what tells the system to run the automation on your next save.
- **Step 4 – Save the IBR.** Saving with the box checked re-runs the automation.
- **Step 5 – Confirm that it worked.** After the page is reloaded, look at the top of the IBR. A green message “<Sales Order #> Activation Sales Order successfully created” means it worked. The Activation Sales Order field will be filled in, and the Activation Status will be set to Active automatically. If you see the red message again, re-read the reason and repeat Steps 2–4.

Note: The message “Existing Contract Activation Sales Order updated” is a successful result, not a failure. For replacements and upgrades not sold with service, no new ASO is created — the existing contract is updated with the new Serial Number / SIM instead.

An ASO may fail for the following reasons

An Activation Sales Order may not be created if the IBR or device information is incomplete or inconsistent. When this happens, the IBR shows a red message that begins with “Activation Sales Order creation failed. Error Message: ...”, and the words after “Error Message:” tell you the exact reason.

The most common reasons, and what to check for each, are:

What you see / what happened	What it means	What to check on the IBR
Original Sales Order is blank	The IBR is not linked to the sales order the	Open the IBR and review the Original

	device was originally sold on, so the system has nothing to copy pricing or terms from.	Sales Order field. If it is empty, fill it in with the correct sales order.
Subscription Line ID is missing	The IBR does not point to the specific line on the sales order that carries the subscription or service, so the system cannot tell what to activate.	Check the Subscription Line ID field on the IBR. If blank, the device may not have been sold with a subscription, or the link was not set. Validate on original sales order.
Item not found on original SO line	The subscription line for the IBR points no longer exists on the sales order. The order may have been edited, or the line removed.	Open the linked Original Sales Order and confirm that the subscription or service line is still there and unchanged.
No ASO created; no qualifying line item	The item on that line is not a subscription or service type, so there is nothing to activate as a subscription.	Confirm the device was sold with service, not hardware only.
Replacement or upgrade has no contract to update	For a replacement or an upgrade not sold with service, the system updates the existing contract instead of creating a new ASO. In this case, it could not find an existing contract or contract item to update.	Confirm that the device being replaced has an existing Contract or Contract Item . If there is no prior contract, there is nothing to update.

Any other error, such as period is closed, configuration, or permission messages	A system condition blocked the sales order from saving. This is most often a closed accounting period or a setup or permission issue.	Note the exact wording in the banner. This usually requires CRM/ERP Help rather than data correction.
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Tip: Before you re-try, make sure these fields on the IBR are all filled in and correct: Original Sales Order, Subscription Line ID, Serial Number, SIM, Subscription Term. Most failures are one of these being blank or wrong.

- If an Activation Sales Order is not generated and the issue cannot be resolved through data correction, submit a **CRM/ERP Help** ticket for assistance.

Important Notes

Applies to New Activations

- ASO automations will be triggered and set up the customer contract with a contract item for future subscription renewals.

Does NOT apply to Replacement Panels and UPG not sold with service

- The existing Contract of the replaced device will be updated with the new Serial Number/SIM of the replacement device.
 - Upon activation of a replacement, a new ASO will not be created.
 - Example: 07008169 EOS 12/31/21 was upgraded with 10056095. The contract on the new ISB was updated with the new Serial Number and the EOS remained the same. This is because the UPG was NOT sold with additional service.

Approvals & Signoff

[NetSuite IBR Activation Sales Order \(ASO\) Automation Approvals & Signoff](#)