aheadWorks

MAGENTO EXTENSIONS
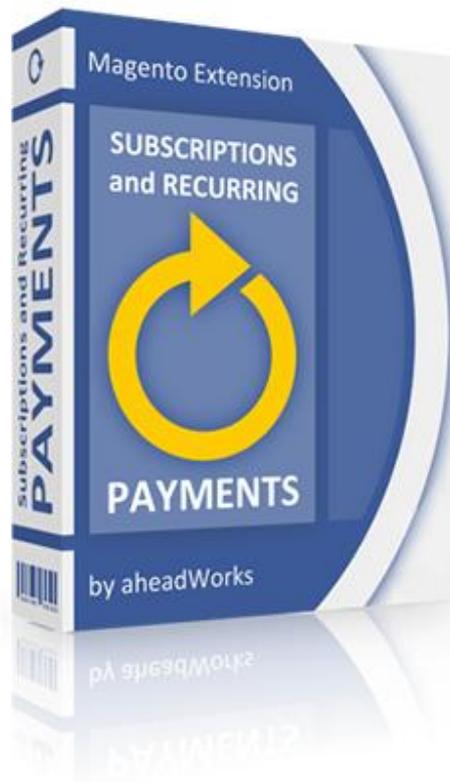
"Subscriptions and Recurring Payments" User Guide

Table of Contents

1. Introducing Subscriptions and Recurring Payments

The "Subscriptions and Recurring Payments" extension from aheadWorks Co. adds a host of features to native Magento capabilities so that you can accept recurring payments and sell subscription products more easily and efficiently. Simply add this capability to increase recurring revenue stream to your business model for products as diverse as info-products, software or bottled water.

If you deal online in memberships and subscription products and want to manage them efficiently and effortlessly, your hunt for a solution stops here. The Subscriptions and Recurring Payments extension from aheadWorks Co. is for you if you sell products that are purchased with certain regularity: be it magazines, software licenses, or products like grocery, bottled water, memberships, pills, detergents etc.

2. Subscriptions and Recurring Payments Configuration

The following describes how to configure the Subscriptions and Recurring Payments extension.

1. Go to the **System → Configuration → aheadWorks Extensions → Subscriptions** page at the backend.

2. Define whether to use radio buttons for selecting subscription types. If you select **No**, the subscription types will be shown in the dropdown menu.

3. Select the columns which customers will be able to see at the **My Account → My Subscriptions** page.

   The Subscriptions and Recurring Payments extension adds the **My Subscriptions** tab at the customers' account page where they can get the complete information about their subscriptions. You can specify which columns – **Next payment**, **Next delivery**, **Order amount** and/or **Expire date** – will be visible there.

Product(s)	Last order amount	Price	Start	Expires	Period	Next payment	Next delivery	Status	
Sports Illustrated (1)	$582.49	$15.00	2/1/12	3/2/12	Once a Week	2/3/12	2/1/12	Active	Edit Payments History

4. Specify whether to show the **Delivery Notice** field at the checkout page. If you select **Yes** in the **Show postman notice at checkout** field, customers will see the following at the checkout:

In this field customers can specify some notices to a postman – the best time for delivery, a request to call before delivery, some remarks about the address or anything else.

5. Define whether guests will be able to subscribe in your store or only registered customers are allowed to do it.

6. Specify an order status when subscriptions will be activated.

7. In the **Alerts sender** field, select the emails (alerts) sender which will be used in the "From" field of emails (alerts). In this dropdown list the contacts from the **System → Configuration → General → Store Emails Addresses** configuration page is taken.

8. In the **Shipping cost** field, specify the cost of delivery that will be applied to all subscriptions. If you want to define a special shipping cost for an item, go to the **Catalog → Manage Products** page. Specify it in the **Subscriptions** tab of the product.

9. Click the **Save Config** button.

3. Managing Subscription Periods

The extension offers quite flexible subscription periods which everyone can configure according to their needs. You can create an everyday/week/month/year subscription or specify some periodical deliveries – once a week, twice a month, three times a year, etc. If you don't have delivery on Sunday, no problem – the extension allows you to set up the days of week when subscription is excluded.

To create a new subscription period, you should:

1. Go to the **Catalog → Subscriptions → Periodicity** page at the backend.

2. Click the **Add New** button.

3. In the **Name** field, specify the period name which will be displayed on the product page.

4. In the **Sort Order** field, specify the order for this period to be displayed on the product page.

5. In the **Repeat each** field, specify the periodicity of service rendering/product delivery.

6. In the **Expires After** field, define after what period the subscription will expire.

7. In the **Exclude Weekdays** field, select the days of the week forbidden for subscriptions.

8. Specify before what number of days till service rendering/ product delivery the customers have to effect payment.

9. Click the **Save** button.

4. Managing Subscription/Recurring Payment Product

The Subscriptions and Recurring Payments extension adds a new product type – **Subscription/recurring payment**. You can either create a new product and specify its attributes and parameters or just convert a simple product to subscription (all the data remains unchanged, a new tab is added only). The chapters below describe how to do it properly.

Creating New Product

1. Go to the **Catalog → Manage Products** page at the backend.

2. Click the **Add Product** button.

3. In the **Attribute Set** field, select the set that contains the attributes that best describe your new product.

4. In the **Product Type** field, select **Subscription/recurring payment, Downloadable subscription/recurring payment, Configurable subscription/recurring payment,** or **Grouped subscription/recurring payment**.

5. Click the **Continue** button.
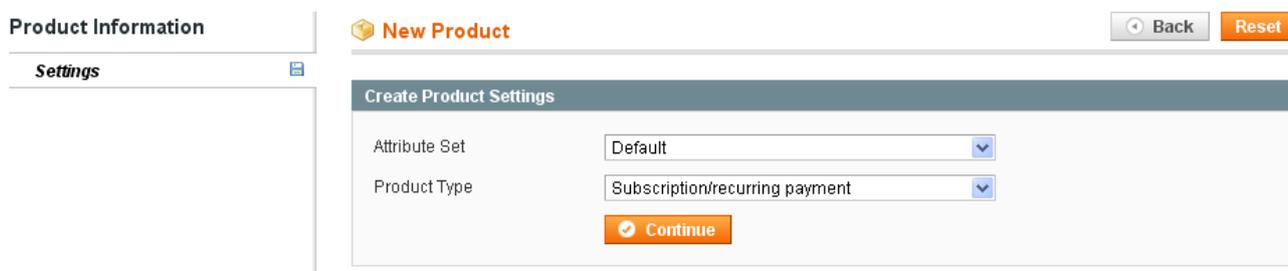
All product types are created the same way as the corresponding native Magento products.

Specify all required product attributes and parameters you usually do when you add a new product.

Subscription

1. Open the **Subscription** tab on the left. This tab is added by the Subscriptions and Recurring Payments extension.

2. Enable product subscription.

3. Select what period types will be available for this product subscription (to know how to edit or add new subscription types see page 6).

> **Note:** *the No subscription period type allows you to sell items as simple products (without subscription).*

4. Specify whether to enable shipping.

5. In the **Subscription price** field, define the price for the subscription product (to learn more about price types see page 14).

6. In the **First period price** field, you can specify the price which should be paid for the first time (to learn more see page 16).

7. Specify whether to move customers to some special group after their subscription and/or unsubscription. You can create new customer groups on the **Customers → Customers Groups** backend page.

8. In the **Shipping cost** field, specify the cost of delivery. If you don't fill this field, the general settings from the **System → Configuration → aheadWorks Extensions → Subscriptions** page will be applied.

9. Define whether guests will be able to subscribe in your store or only registered customers are allowed to do it. If you choose **Global,** the general settings from the **System → Configuration → aheadWorks Extensions → Subscriptions** page will be applied.

10. Specify whether to change first period price according to selected product options.

11. Click the **Save** button.

When you open the product page you have just created, you can see the following as an example:
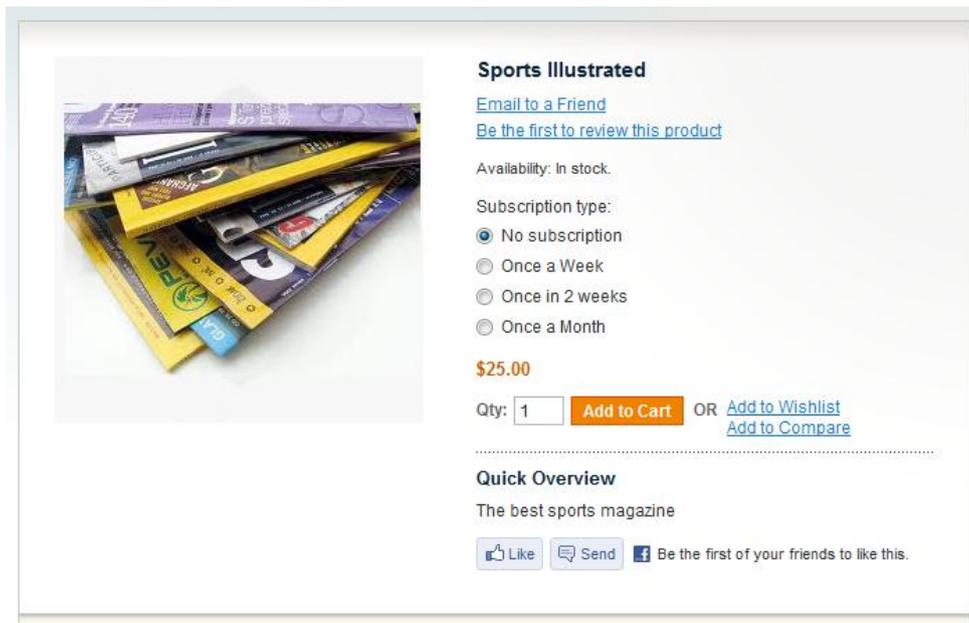
*Note: the day of **First delivery** can be different for each subscription type – it depends on the value you've specified in the **Require payment before, days** field while creating a new subscription period (see page 6).*

Converting Simple Product to Subscription Type

The Subscriptions and Recurring Payments extension allows not only creating new products of subscription type but also converting simple products to subscription ones in just few clicks. The following describes how to do it properly.

1. Go to the **Catalog → Manage Products** page at the backend.

2. Find the simple product you want to convert and click **Edit** in its row.

3. Open the **Enable subscriptions** tab on the left.

4. Click the **Convert this product to subscription** button.

The product is converted to subscription and the **Subscription** tab is automatically added.

Now you should set up subscription parameters for this product.

Subscription

1. Open the **Subscription** tab on the left.

2. Enable product subscription.

3. Select what period types will be available for this product subscription.

   Note: *the No subscription period type allows you to sell items as simple products (without subscription).*

4. Specify whether to enable shipping.

5. In the **Subscription price** field, define the price for the subscription product (to learn more about price types see page 14).

6. In the **First period price** field, you can specify the price which should be paid for the first time (to learn more see page 16).

7. Specify whether to move customers to some special group after their subscription and/or unsubscription. You can create new customer groups on the **Customers → Customers Groups** backend page.

8. In the **Shipping cost** field, specify the cost of delivery. If you don't fill this field, the general settings from the **System → Configuration → aheadWorks Extensions → Subscriptions** page will be applied.

9. Define whether guests will be able to subscribe in your store or only registered customers are allowed to do it. If you choose **Global,** the general settings from the **System → Configuration → aheadWorks Extensions → Subscriptions** page will be applied.

10. Specify whether to change first period price according to selected product options.

11. Click the **Save** button.

Now on the product page we can see that the product is available for subscription:

Product Prices

An item can have different prices when it is sold with subscription and without it.

Regular price is a price for an item without subscription ($25 in our example). In this case, it is considered as a simple product. Its price is taken from the **Prices** tab of the Product information page.

Subscription price is a price for a product that is sold with subscription ($20 in our example).

For example, when customers purchase one magazine issue (without subscription), they pay the regular price ($25). When customers subscribe for the magazine, they pay the subscription price every subscription period - $20 (for example, monthly).

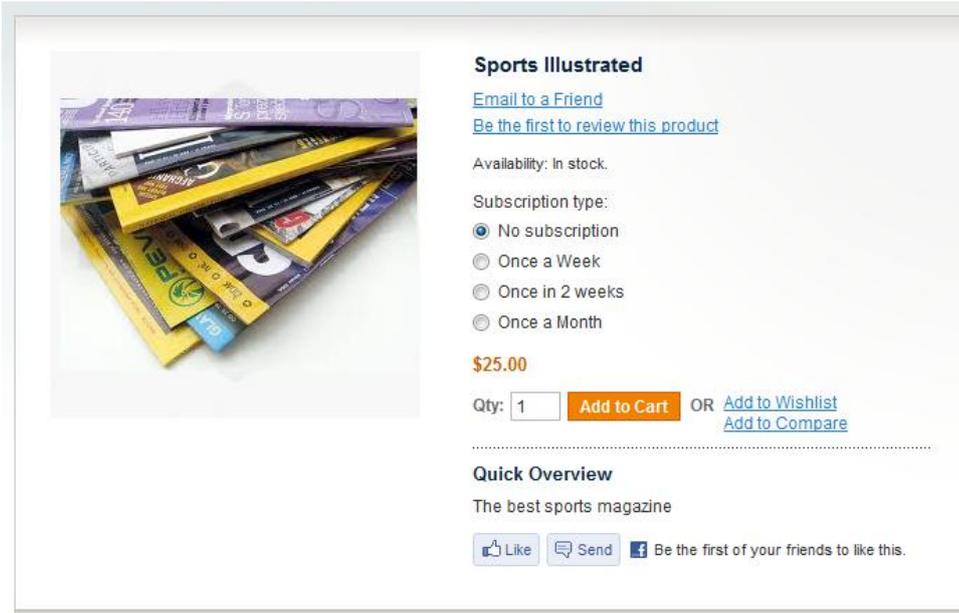The price specified in the **Subscription price** field will be displayed on the category page.

The regular price defined in the **Price** field of the **Prices** tab will be displayed on the product page if the **No subscription** option is available.

If the **No subscription** period type is not specified for the product, it is sold only with subscription; thus, the subscription price will be displayed at both pages.
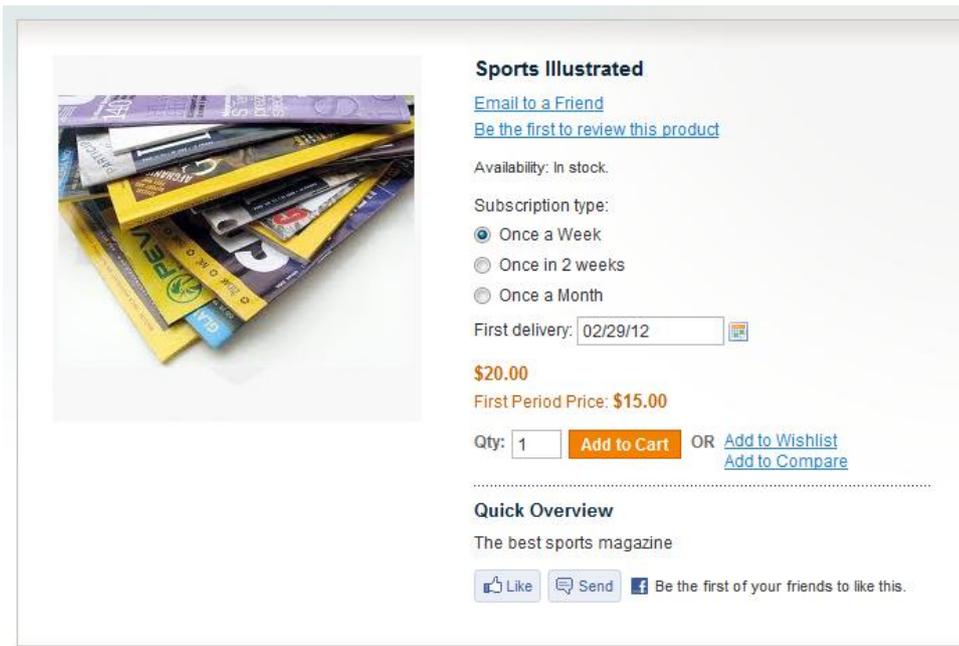
The **First period price** is implemented for promotional means. It specifies the price for the product with subscription which should be paid for the first time.

For example, when customers subscribe for the magazine, the first time they pay $15, and then they will pay $20 every subscription period.

5. Managing Subscriptions

You can view all information about current subscriptions on the **Catalog → Subscriptions → Subscriptions List** backend page.

To edit the subscription, click **Edit** in the subscription row.

Main

1. Open the **Main** tab on the left.

2. In the Status field, you can change the subscription status to **Active**, **Suspended**, **Suspended by customer**, **Expired** or **Cancelled**.

3. In the **Period** field, you can view the period of this current subscription. The value of this field can't be changed.

Payments

In the **Payments** tab you can view when the order was created, its number, status and amount. This tab also contains the information about pending payments of this subscription.

If you click the order number, it will lead you to the **Order View** page.

6. Managing Subscribers

Subscriptions and Recurring Payments extension allows you to manage subscribers from **Customers → Subscribers List** page. Here you can view the whole list of your subscribers and export it to CSV or XML by clicking the **Export** button.

To edit the subscribers' information, click **Edit** in the subscriber row and you will be led to the **Customer Information** page:

7. Managing Subscriptions Alerts

The Subscriptions and Recurring Payments module allows you to send email notifications – alerts – to customers and/or store administrators after different events took place – first delivery, expiration date, unsubscription, and so on.

Subscriptions and Recurring Payments uses templates for its emails – the same as Newsletters and Transactional Emails do. While creating a new alert you are to select the template for the email, so first of all you should create a template.

New Template Creating

The Subscriptions and Recurring Payments extension works with Transactional email templates, so to create a new template you should:

1. Go to the **System → Transactional Emails** page at the backend.

2. Click the **Add New Template** button.

3. Leave the **Template** field empty.

4. Specify the name.

5. Define the subject of the template.

6. In the **Template Content** field, enter the email text using the HTML code. You can use the following variables:

Variable	Meaning
subscription.id	ID of subscription
subscription.customer_name	name of the customer who purchased subscription
subscription.getCustomerUrl()	URL for customer to view subscription
subscription.getAdminUrl()	URL for admin to view subscription
subscription.next_delivery_date	next delivery date
subscription.next_payment_date	next payment date
subscription.first_delivery_date	first delivery date
subscription.customer_email	customer email address
subscription.products_text	products with quantity included in subscription

For example, if you specify the following code in the **Template Content** field:

*Dear {{var **subscription.customer_name**}}!*
*The next delivery is planned on {{var **subscription.next_delivery_date**}}. Please, don't forget to effect payment on {{var **subscription.next_payment_date**}}*

It can be displayed in the email notification as:

Dear John Smith!
The next delivery is planned on December 24, 2009. Please, don't forget to effect payment on December 21, 2009.

7. You can define the layout of the template by defining CSS tags in **Template Styles**.

8. To preview the template click the **Preview Template** button.

9. Click the **Save Template** button.

New Alert Creating

Now when the template is added, you can create a required alert.

1. Go to the **Catalog → Subscriptions → Subscriptions Alerts** backend page.

2. Click the **Add New** button.

3. Specify the name for the alert.

4. Enable subscription alert.

5. Select the required **Event Type**: **First Delivery**, **Delivery**, **Expiration date**, **New Subscription, Suspended, Unsubscription** or **Activation** which will cause the email sending.

6. In the **Recipient** field, select whether the email will be send to **Customer** email or to any of emails defined in the **System → Configuration → General → Store Web Addresses** page – **General Contact**, **Sales representative**, **Customer support**, **Custom email 1**, **Custom email 2**.

7. In the **Notify** field, specify after (or before) what number of days (hours) the email will be send.

8. Select the template you have just created.

9. Click the **Save** button.

Note: *in the "From" field of your alert (email) there will be displayed the sender specified in the **Alerts sender** field of the **Subscription configuration** page (see page 5).*

8. Managing Subscriptions on Customers' Part

Subscribing for a product (service)

If the **No subscription** period type is specified for the item (see chapter 4), it can be sold as a simple product at the regular price. To purchase a product (service) with subscription at the subscription price, customers should specify the subscription type and the date of the first delivery:

If the **No subscription** period type is not specified for the product, it is sold only with subscription.

The first available day for delivery is counted in the following way:

Today + **Require payment before, days** field (*Catalog → Subscriptions → Periodicity → Subscription Period*)

So, if today is February 21, 2012, the first date available for delivery is February 24, 2012.

After the product (service) is added to cart, clients go to checkout. On the Checkout page the Subscriptions and Recurring Payments extension adds a **Delivery Notice** field where customers can specify some notices to a postman – the best time for delivery, a request to call before delivery, some remarks about the address or anything else. This field can be enabled/disabled from the **System → Configuration → aheadWorks Extensions → Subscriptions** page at the backend (see chapter 2).

In the **Payment Information** tab, customers can select one of the supported payment methods – Authorize.net, PayPal, AgroFire Payment, Check, Money Order, Saved Credit Card or Zero Check-out:

The Subscriptions and Recurring Payments extension supports only the above-mentioned payment methods for subscription products. But if an item is ordered as a simple product **without subscription**, it can be paid by **all payment methods available** in the store.

For example, Credit card (saved), Cybersource and PayPal are available for payments in your e-store. An item has the following options:

- No subscription

- Weekly

- Monthly

If customers order the product with "weekly" or "monthly" subscription, they can pay by Credit card (saved) or PayPal.

If customers select the "no subscription" option, all payment methods will be available: Credit card (saved), PayPal and Cybersource.

> **Note:** *if a customer uses a payment gateway (e.g. PayPal), money will be charged off automatically every subscription period.*

Editing Subscriptions

The Subscriptions and Recurring Payments extension adds the **My Subscriptions** tab on the **My Account** page where customers can view and manage their subscriptions. From this page customers can edit subscription information and view payment history.

MY ACCOUNT									
Account Dashboard									
Account Information									
Address Book									
My Orders									
Billing Agreements									
Recurring Profiles									
My Product Reviews									
My Tags									
My Wishlist									
My Downloadable Products									
Newsletter Subscriptions									
My Subscriptions									

My Subscriptions

1 Item(s)   Show 10 per page

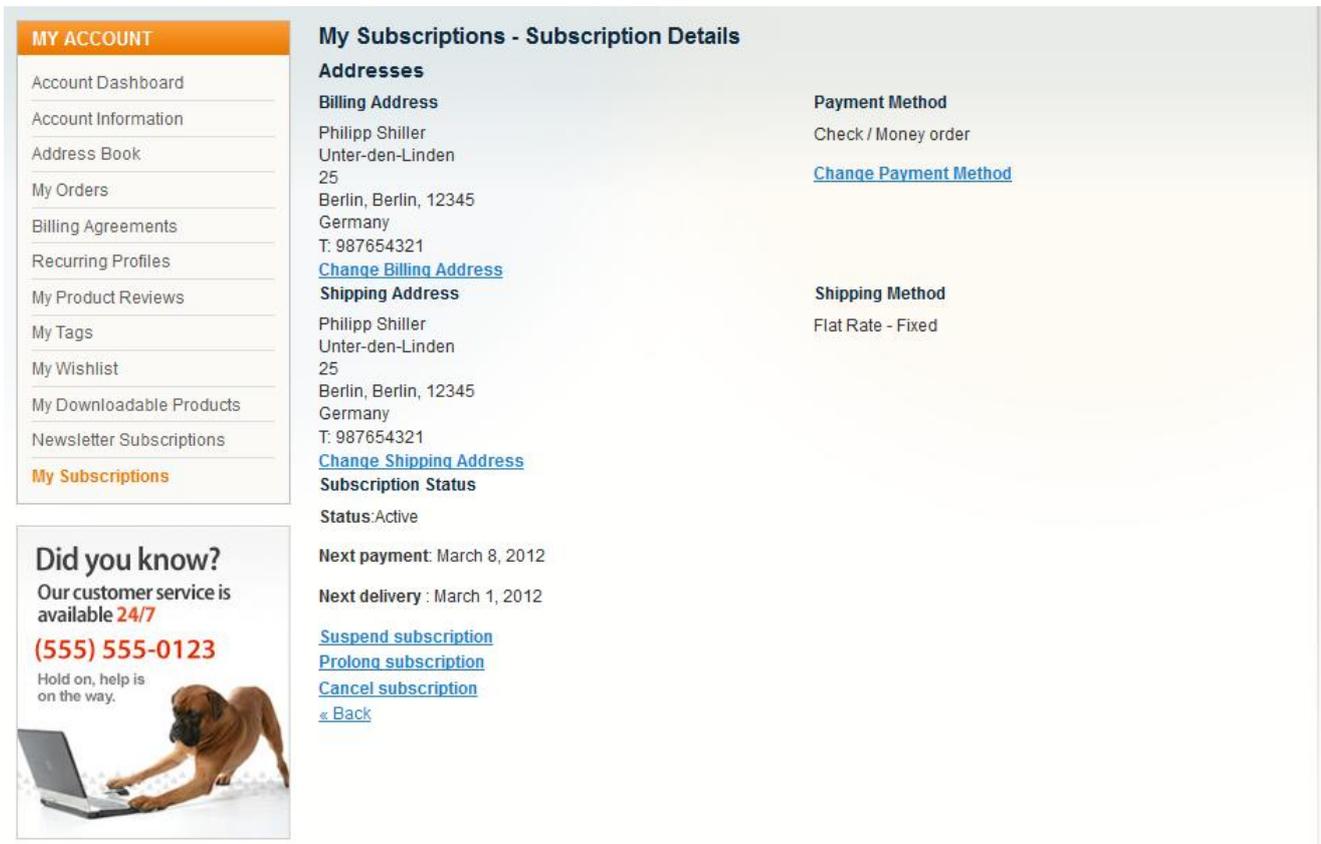| Product(s)	Last order amount	Price	Start	Expires	Period	Next payment	Next delivery	Status	
Sports Illustrated (1)	$582.49	$15.00	2/1/12	3/2/12	Once a Week	2/3/12	2/1/12	Active	Edit Payments History

1 Item(s)   Show 10 per page

« Back

If an order has an active status, the parameters of the subscription can't be changed. It is only possible to change order status, billing and shipping addresses. The period of the active subscription can't be corrected.

If customers change payment method, the current subscription is cancelled, the item is added to cart and it's necessary to proceed to checkout one more time to change the payment method.

Suspending/Cancelling Subscriptions

To change the subscription status customers should click **Edit** in the subscription row on the **My Account → My Subscriptions** page to display the following page:

Here customers can change billing and shipping addresses, payment method and subscription status.

To **Suspend** or **Cancel** subscription they should click the appropriate line. After confirming the action, the status will change.

Activating Subscriptions

All subscriptions – whether activated, suspended or cancelled – are saved and can't be deleted. So customers can always reactivate any subscription from the **My Account → My Subscriptions** page**.**

To activate suspended subscription click **Edit** in the required subscription row. In the **My Subscriptions – Subscription Details** page click the **Activate subscription** link. The subscription status will change.

The cancelled subscription can be activated from the **My Account → My Subscriptions** page. Click **Edit** in the required subscription row to display the following:

In the **My Subscriptions – Subscription Details** page click the link for activation. It will lead to the **Shopping cart** page.

If you want to make changes in the subscription, click the **Edit** button, specify item parameters, and then click the **Update Cart** button.

If all the parameters are right, just click the **Proceed to Checkout** button and continue checkout. As a result, a new subscription will appear in the **My Account → My Subscriptions** page.

Prolonging Subscriptions

The subscriptions can be prolonged from the **My Account → My Subscriptions** page. Click **Edit** in the required subscription row to display the following:

In the **My Subscriptions – Subscription Details** page click the **Prolong subscription** link. It will lead you to the **Shopping cart** page.

If you want to make changes in the subscription, click the **Edit** button, specify item parameters, and then click the **Update Cart** button.

If all the parameters are right, just click the **Proceed to Checkout** button and continue checkout. As a result, a new subscription will appear in the **My Account → My Subscriptions** page.