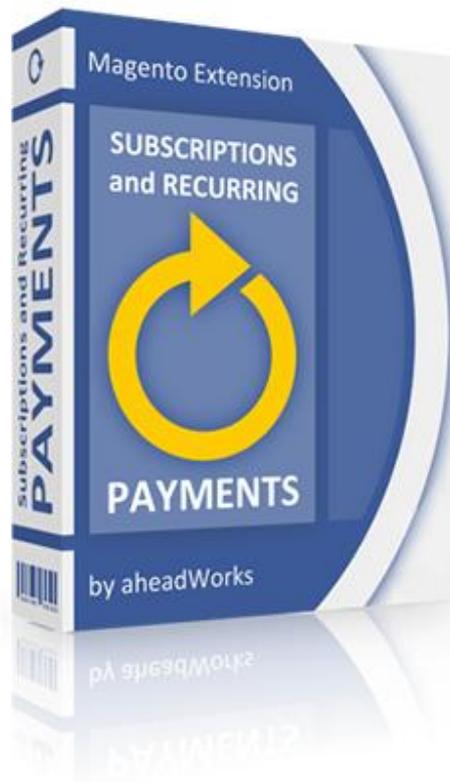


# aheadWorks

MAGENTO EXTENSIONS



## “Subscriptions and Recurring Payments” User Guide

Version: 1.6  
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Support: [helpdesk@aheadworks.com](mailto:helpdesk@aheadworks.com)

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# 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	
<a href="#">Sports Illustrated</a> (1)	\$582.49	\$15.00	2/1/12	3/2/12	Once a Week	2/3/12	2/1/12	Active	<a href="#">Edit</a> <a href="#">Payments</a> <a href="#">History</a>

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:

1 Billing Information

2 Shipping Information

3 **Shipping Method**

Flat Rate

Fixed \$5.00

Delivery Notice

[↑ Back](#) [Continue](#)

4 Payment Information

5 Order Review

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.

**Subscriptions**
[Save Config](#)

---

**Appearance**

Use radio buttons for selecting subscription type	<input type="text" value="Yes"/>	[STORE VIEW]
Show "Next payment" column at customer account	<input type="text" value="Yes"/>	[STORE VIEW]
Show "Next delivery" column at customer account	<input type="text" value="Yes"/>	[STORE VIEW]
Show "Order amount" column at customer account	<input type="text" value="Yes"/>	[STORE VIEW]
Show "Expire date" column at customer account	<input type="text" value="Yes"/>	[STORE VIEW]
Show postman notice at checkout	<input type="text" value="Yes"/>	[STORE VIEW]

**General**

Allow guest subscriptions	<input type="text" value="No"/>	[STORE VIEW]
Activate on order status	<input type="text" value="Complete"/>	[WEBSITE]
Alerts sender	<input type="text" value="General Contact"/>	[WEBSITE]
Shipping cost	<input type="text"/>	[WEBSITE]

### 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.

**Create New Period** Back Reset Save

**Period Details**

Name \*

Sort Order

Repeat each \*  Days

Expires After  Days

Exclude Weekdays

<input type="checkbox"/>	Sunday
<input type="checkbox"/>	Monday
<input type="checkbox"/>	Tuesday
<input type="checkbox"/>	Wednesday
<input type="checkbox"/>	Thursday
<input type="checkbox"/>	Friday
<input type="checkbox"/>	Saturday
<input type="checkbox"/>	

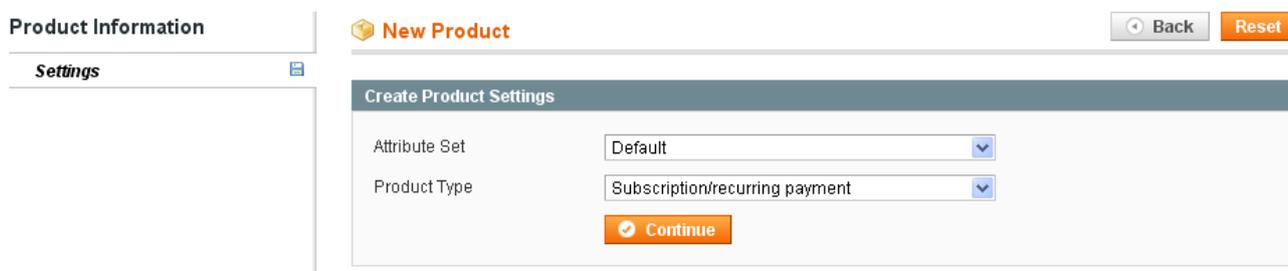
Require payment before, days

## 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.



The screenshot shows the 'New Product' form in the Magento backend. On the left, there is a sidebar with 'Product Information' and 'Settings' tabs. The main content area is titled 'New Product' and contains a 'Create Product Settings' section. This section has two dropdown menus: 'Attribute Set' set to 'Default' and 'Product Type' set to 'Subscription/recurring payment'. Below these fields is an orange 'Continue' button with a checkmark icon. At the top right of the form, there are 'Back' and 'Reset' buttons.

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.

Choose Store View:  
Default Values ▼

**Product Information**

- General
- Prices
- Meta Information
- Images
- Description
- Design
- Subscription**
- Inventory
- Websites
- Categories
- Related Products
- Up-sells
- Cross-sells
- Product Reviews
- Product Tags
- Customers Tagged Product
- Custom Options

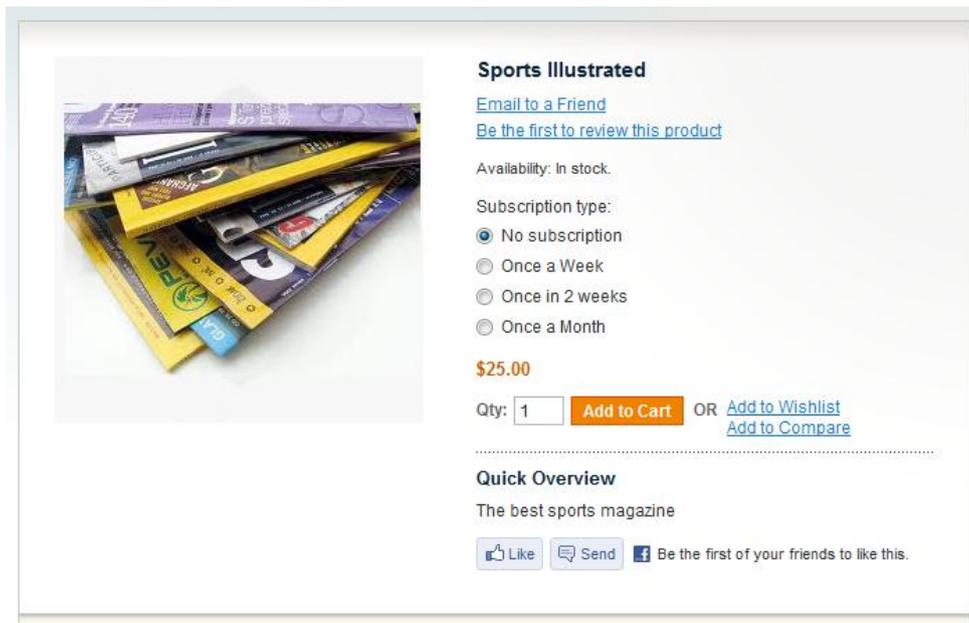
**Sports Illustrated (Default)**

---

[Create New Attribute](#)

Enable *	Yes	[WEBSITE]
Period type(s)	<div style="border: 1px solid #ccc; padding: 2px;"> <ul style="list-style-type: none"> <li>No subscription</li> <li>Once a Week</li> <li>Once in 2 weeks</li> <li>Once a Month</li> </ul> </div>	[WEBSITE]
Enable shipping	Yes	[WEBSITE]
Subscription Price	20	[WEBSITE]
First period price	15	[WEBSITE]
On subscription, move to group	--- No change ---	[WEBSITE]
On unsubscription/expiry, move to group	--- No change ---	[WEBSITE]
Shipping cost	0	[WEBSITE]
Allow guest subscriptions *	No	[WEBSITE]
Change first period price according to selected product options *	Yes	[WEBSITE]

When you open the product page you have just created, you can see the following as an example:



**Sports Illustrated**

[Email to a Friend](#)  
[Be the first to review this product](#)

Availability: In stock.

Subscription type:

- No subscription
- Once a Week
- Once in 2 weeks
- Once a Month

**\$25.00**

Qty:  [Add to Cart](#) OR [Add to Wishlist](#)  
[Add to Compare](#)

---

**Quick Overview**

The best sports magazine

[Like](#) [Send](#) [Be the first of your friends to like this.](#)

*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 screenshot shows the Magento product edit interface for a product named "Newspaper (Default)". On the left, a sidebar titled "Product Information" contains a list of tabs: General, Prices, Meta Information, Images, Description, Design, Inventory, Websites, Categories, Related Products, Up-sells, Cross-sells, Product Reviews, Product Tags, Customers Tagged Product, Custom Options, and "Enable subscriptions". The "Enable subscriptions" tab is currently selected. At the top right, a toolbar contains several action buttons: "Back", "Reset", "Delete", "Duplicate", "Save", and "Save and Continue Edit". Below this toolbar, a prominent orange button with a plus icon is labeled "Convert this product to subscription".

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

Choose Store View:  
Default Values

**Product Information**

- General
- Prices
- Meta Information
- Images
- Description
- Design
- Subscription
- Inventory
- Websites
- Categories
- Related Products
- Up-sells
- Cross-sells
- Product Reviews
- Product Tags
- Customers Tagged Product
- Custom Options

**Newspaper (Default)**

Back Reset Delete Duplicate Save Save and Continue Edit

**General** Create New Attribute

Name *	Newspaper	[STORE VIEW]
SKU *	newspaper	[GLOBAL]
Weight *	0.1000	[GLOBAL]
Status *	Enabled	[WEBSITE]
Tax Class *	default	[STORE VIEW]
URL Key	newspaper	[GLOBAL]
	<input checked="" type="checkbox"/> Create Permanent Redirect for old URL	
Visibility *	Catalog, Search	[STORE VIEW]
Set Product as New from Date	<input type="text"/>	[GLOBAL]
Set Product as New to Date	<input type="text"/>	[GLOBAL]
In feed	No	[GLOBAL]

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.

Choose Store View:  
Default Values

**Product Information**

- General
- Prices
- Meta Information
- Images
- Description
- Design
- Subscription**
- Inventory
- Websites
- Categories
- Related Products
- Up-sells
- Cross-sells
- Product Reviews
- Product Tags
- Customers Tagged Product
- Custom Options

### Newspaper (Default)

[Back](#)
[Reset](#)
[Delete](#)
[Duplicate](#)
[Save](#)
[Save and Continue Edit](#)

---

[+ Create New Attribute](#)

Enable \* [WEBSITE]

Period type(s) [WEBSITE]

No subscription

Once a Week

Once in 2 weeks

Once a Month

Enable shipping [WEBSITE]

Subscription Price [WEBSITE]

First period price [WEBSITE]

On subscription, move to group [WEBSITE]

On unsubscription/expiry, move to group [WEBSITE]

Shipping cost [WEBSITE]

Allow guest subscriptions \* [WEBSITE]

Change first period price according to selected product options \* [WEBSITE]

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



### Newspaper

[Email to a Friend](#)

[Be the first to review this product](#)

Availability: In stock.

Subscription type:

Once a Week

Once a Month

First delivery:

**\$2.99**

First Period Price: **\$2.55**

Qty:  [Add to Cart](#) OR [Add to Wishlist](#)  
[Add to Compare](#)

---

**Quick Overview**

The best newspaper

# 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.

The screenshot displays the 'Prices' tab in the Magento Admin interface. On the left, a sidebar lists various product information sections: 'General', 'Prices', 'Meta Information', 'Images', 'Description', 'Design', 'Subscription', 'Inventory', 'Websites', 'Categories', 'Related Products', 'Up-sells', 'Cross-sells', 'Product Reviews', 'Product Tags', 'Customers Tagged Product', and 'Custom Options'. The 'Prices' section is currently selected. The main content area shows the 'Prices' configuration for the product. At the top, there are navigation buttons: 'Back', 'Reset', 'Delete', 'Duplicate', 'Save', and 'Save and Continue Edit'. Below these, the 'Prices' section is titled, and there is a '+ Create New Attribute' button. The 'Price \*' field is highlighted with a red box and contains the value '25.00 [USD]'. Other fields include 'Cost' (empty), 'Tier Price' (a table with columns 'Website', 'Customer Group', 'Qty', 'Price', and 'Action', and an 'Add Tier' button), 'Special Price' (empty), 'Special Price From Date' (empty), 'Special Price To Date' (empty), and 'Is Product Available for Purchase with Google Checkout' (set to 'Yes').

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

Choose Store View:  
Default Values

**Product Information**

- General
- Prices
- Meta Information
- Images
- Description
- Design
- Subscription**
- Inventory
- Websites
- Categories
- Related Products
- Up-sells
- Cross-sells
- Product Reviews
- Product Tags
- Customers Tagged Product
- Custom Options

**Sports Illustrated (Default)**

[Back](#)
[Reset](#)
[Delete](#)
[Duplicate](#)
[Save](#)
[Save and Continue Edit](#)

[+ Create New Attribute](#)

Enable *	Yes	[WEBSITE]
Period type(s)	<div style="border: 1px solid #ccc; padding: 2px;">           No subscription            Once a Week            Once in 2 weeks            Once a Month         </div>	[WEBSITE]
Enable shipping	Yes	[WEBSITE]
Subscription Price	20	[WEBSITE]
First period price	15	[WEBSITE]
On subscription, move to group	--- No change ---	[WEBSITE]
On unsubscription/expiry, move to group	--- No change ---	[WEBSITE]
Shipping cost	0	[WEBSITE]
Allow guest subscriptions *	No	[WEBSITE]
Change first period price according to selected product options *	Yes	[WEBSITE]

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.

3 Item(s)

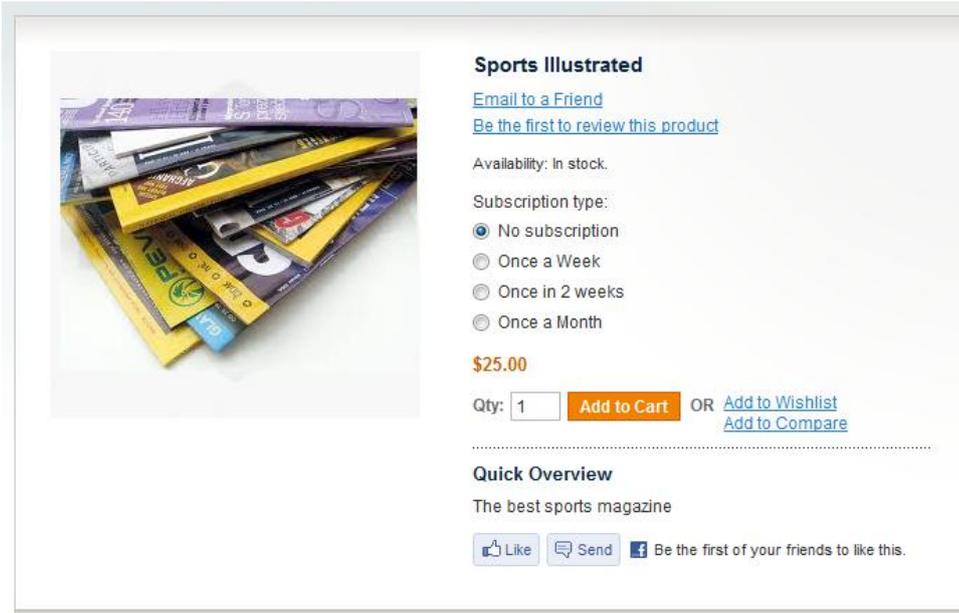
View as: [Grid](#) [List](#)

 <p><b>Mitre Ultimatch Match Ball</b> \$19.99</p> <p><a href="#">Add to Cart</a> <a href="#">Add to Wishlist</a> <a href="#">Add to Compare</a></p>	 <p><b>Team Sports Duffel Bag - MacGregor 2/Set Nylon</b> \$35.50</p> <p><a href="#">Add to Cart</a> <a href="#">Add to Wishlist</a> <a href="#">Add to Compare</a></p>	 <p><b>Sports Illustrated</b> \$20.00</p> <p><a href="#">Add to Cart</a> <a href="#">Add to Wishlist</a> <a href="#">Add to Compare</a></p>
--	--	---

3 Item(s)

View as: [Grid](#) [List](#)

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.



**Sports Illustrated**  
[Email to a Friend](#)  
[Be the first to review this product](#)

Availability: In stock.

Subscription type:  
 No subscription  
 Once a Week  
 Once in 2 weeks  
 Once a Month

**\$25.00**

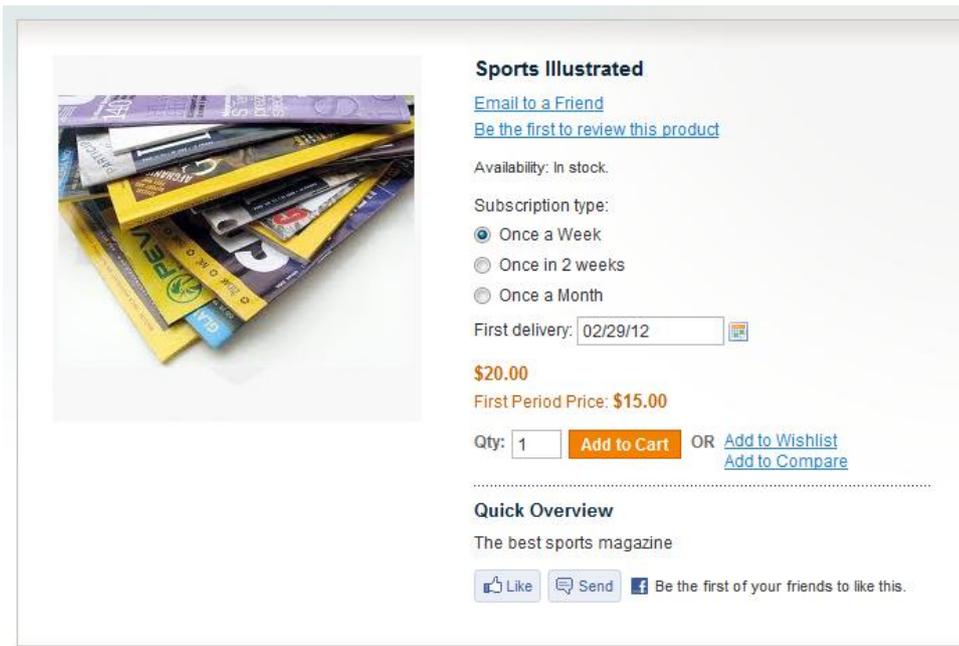
Qty:  [Add to Cart](#) OR [Add to Wishlist](#)  
[Add to Compare](#)

---

**Quick Overview**  
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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.



**Sports Illustrated**  
[Email to a Friend](#)  
[Be the first to review this product](#)

Availability: In stock.

Subscription type:  
 Once a Week  
 Once in 2 weeks  
 Once a Month

First delivery:  

**\$20.00**  
First Period Price: **\$15.00**

Qty:  [Add to Cart](#) OR [Add to Wishlist](#)  
[Add to Compare](#)

---

**Quick Overview**  
The best sports magazine

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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.

The screenshot shows the Magento Admin interface for configuring a product subscription. On the left is a sidebar with a 'Choose Store View' dropdown set to 'Default Values' and a 'Product Information' menu with categories like General, Prices, Meta Information, Images, Description, Design, Subscription, Inventory, Websites, Categories, Related Products, Up-sells, Cross-sells, Product Reviews, Product Tags, Customers Tagged Product, and Custom Options. The main content area is titled 'Sports Illustrated (Default)' and includes action buttons: Back, Reset, Delete, Duplicate, Save, and Save and Continue Edit. Below this is the 'Subscription' configuration section with a 'Create New Attribute' button. The configuration includes the following fields:

- Enable \*: Yes [WEBSITE]
- Period type(s): A dropdown menu with options: No subscription, Once a Week, Once in 2 weeks, and Once a Month. [WEBSITE]
- Enable shipping: Yes [WEBSITE]
- Subscription Price: 20 [WEBSITE]
- First period price: 15 [WEBSITE] (highlighted with a red box)
- On subscription, move to group: --- No change --- [WEBSITE]
- On unsubscription/expiry, move to group: --- No change --- [WEBSITE]
- Shipping cost: 0 [WEBSITE]
- Allow guest subscriptions \*: No [WEBSITE]
- Change first period price according to selected product options \*: Yes [WEBSITE]

## 5. Managing Subscriptions

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

**Subscriptions List**

Page 1 of 1 pages | View 20 per page | Total 5 records found [Reset Filter](#) [Search](#)

ID	Store	Customer	Subscription Start	Subscription End	Next Payment	Next Delivery	Subscription type	Status	Last order state	Last Order Amount	SKU	Products	Action
			From: <input type="text"/> To: <input type="text"/>				From: <input type="text"/> To: <input type="text"/>						
3	Main Website Main Store	Pierre Cardin	Dec 15, 2009		Dec 16, 2009	Dec 15, 2009	Once a week	Active	Complete	\$11.00	massage	Massage (1)	<a href="#">Edit</a>
2	Main Website Main Store	Tom Brown	Dec 7, 2009		Dec 21, 2009	Dec 21, 2009	Once in 2 weeks	Suspended	Pending	\$14.00	newspaper	Newspapers and Magazines (2)	<a href="#">Edit</a>
1	Main Website Main Store	John Smith	Dec 3, 2009				Once in 2 weeks	Canceled	Complete	\$95.00	coffee	Coffee (1)	<a href="#">Edit</a>

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.

#### Subscription Information

##### Main

##### Payments

#### Edit subscription

[Back](#)
[Reset](#)
[Save](#)

##### Main Details

Status \*

Period

### 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.

#### Subscription Information

##### Main

##### Payments

#### Edit subscription

[Back](#)
[Reset](#)
[Save](#)

##### Completed payments

Date	Order #	Order Status	Amount
12/15/09	<a href="#">100000068</a>	Complete	11.0000

##### Pending payments

Date
12/16/09
12/17/09
12/18/09

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.

**Subscribers** [Add New](#)

Page  of 1 pages | View  per page | Total 3 records found | Export to:  [Export](#) [Reset Filter](#) [Search](#)

ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website	Action
From: <input type="text"/>	All cour <input type="text"/>	<input type="text"/>	From: <input type="text"/>	<input type="text"/>	<input type="text"/>					
To: <input type="text"/>								To: <input type="text"/>		
21	John Smith	john@smth.com	General	23543656	45365646	United States	Arizona	Nov 10, 2009 4:39:07 PM	Main Website	<a href="#">Edit</a>
22	Pierre Cardin	pierre@cardn.fr	General	2344356	23456	United States	District of Columbia	Nov 25, 2009 11:02:21 AM	Main Website	<a href="#">Edit</a>
26	Tom Brown	tom@tom.com	General	254565	134566	United States	Arizona	Nov 25, 2009 11:19:22 AM	Main Website	<a href="#">Edit</a>

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

**Customer Information** **Philipp Schiller**

[Back](#) [Reset](#) [Create Order](#) [Delete Customer](#) [Save Customer](#) [Save and Continue Edit](#)

**Customer View**

- Account Information
- Addresses
- Orders
- Billing Agreements
- Recurring Profiles (beta)
- Shopping Cart
- Wishlist
- Newsletter
- Product Reviews
- Product Tags

**Personal Information**

<b>Last Logged In:</b> Jan 31, 2012 12:26:24 AM (Offline)	<b>Default Billing Address</b>
<b>Confirmed email:</b> Confirmed	Philipp Schiller
<b>Account Created on:</b> Jan 23, 2012 6:32:16 AM	Unter-den-Linden
<b>Account Created in:</b> Admin	25
<b>Customer Group:</b> General	Berlin, Berlin, 12345
	Germany
	T: 987654321

**Sales Statistics**

Website	Store	Store View	Lifetime Sales	Average Sale
Main Website	Main Store	English	\$637.47	\$318.74
<b>All Store Views</b>			<b>\$637.47</b>	<b>\$318.74</b>

**Recent Orders**

Shopping Cart - 1 item(s)

Wishlist - 0 item(s)

## 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
<b>subscription.id</b>	ID of subscription
<b>subscription.customer_name</b>	name of the customer who purchased subscription
<b>subscription.getCustomerUrl()</b>	URL for customer to view subscription
<b>subscription.getAdminUrl()</b>	URL for admin to view subscription
<b>subscription.next_delivery_date</b>	next delivery date
<b>subscription.next_payment_date</b>	next payment date
<b>subscription.first_delivery_date</b>	first delivery date
<b>subscription.customer_email</b>	customer email address
<b>subscription.products_text</b>	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 Email Template** Back Reset Convert to Plain Text Preview Template Save Template

Load default template

Template \*

Locale \*

Load Template

Template Information

Template Name \*

Template Subject \*

Insert Variable...

Template Content \*

Template Styles

# 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.

Create New Alert

Back Reset Save

**Alert Details**

Name *	<input type="text"/>
Status *	Enabled
Event Type *	First Delivery
Recipient *	Customer
Notify *	<input type="text"/> Days Before
Store *	All Store Views <b>Main Website</b> Main Store English French German <b>Webs</b> Webs store Spanish
Template	Subscriptions Alert - First Delivery (Default Tem

**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:



**Sports Illustrated**  
[Email to a Friend](#)  
[Be the first to review this product](#)

Availability: In stock.

Subscription type:

- No subscription
- Once a Week
- Once in 2 weeks
- Once a Month

First delivery:

March, 2012							
Today							
Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
8					1	2	3
9	4	5	6	7	8	9	10
10	11	12	13	14	15	16	17
11	18	19	20	21	22	23	24
12	25	26	27	28	29	30	31

Select date

[Add to Wishlist](#)  
[Add to Compare](#)

your friends to like this.

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*)

**Edit period "Once a week"** Back Reset Delete Save

**Period Details**

Name \*

Sort Order

Repeat each \*

Expires After

Exclude Weekdays

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Require payment before, days

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).

1 Billing Information

2 Shipping Information

**3 Shipping Method**

**Flat Rate**  
Fixed \$5.00

**Delivery Notice**

[Back](#) Continue

4 Payment Information

5 Order Review

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 screenshot shows a checkout process with six steps: 1 Checkout method, 2 Billing Information, 3 Shipping Information, 4 Shipping Method, 5 Payment Information (highlighted in orange), and 6 Order Review. The Payment Information section is active and contains the following fields and options:

- Credit Card (Authorize.net)
- Credit Card Type <sup>\*</sup>: --Please Select-- (dropdown menu)
- Credit Card Number <sup>\*</sup>: [text input field]
- Expiration Date <sup>\*</sup>: Month [dropdown menu] Year [dropdown menu]
- Card Verification Number <sup>\*</sup>: [text input field] [What is this?](#)
- Paypal
- Check / Money order
- Credit Card (saved)

At the bottom right of the form, there is a legend: <sup>\*</sup> Required Fields. At the bottom left, there is a [Back](#) link with an upward arrow. At the bottom right, there is a **Continue** button.

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	
<a href="#">Sports Illustrated</a> (1)	\$582.49	\$15.00	2/1/12	3/2/12	Once a Week	2/3/12	2/1/12	Active	<a href="#">Edit Payments History</a>

1 Item(s) Show 10 per page

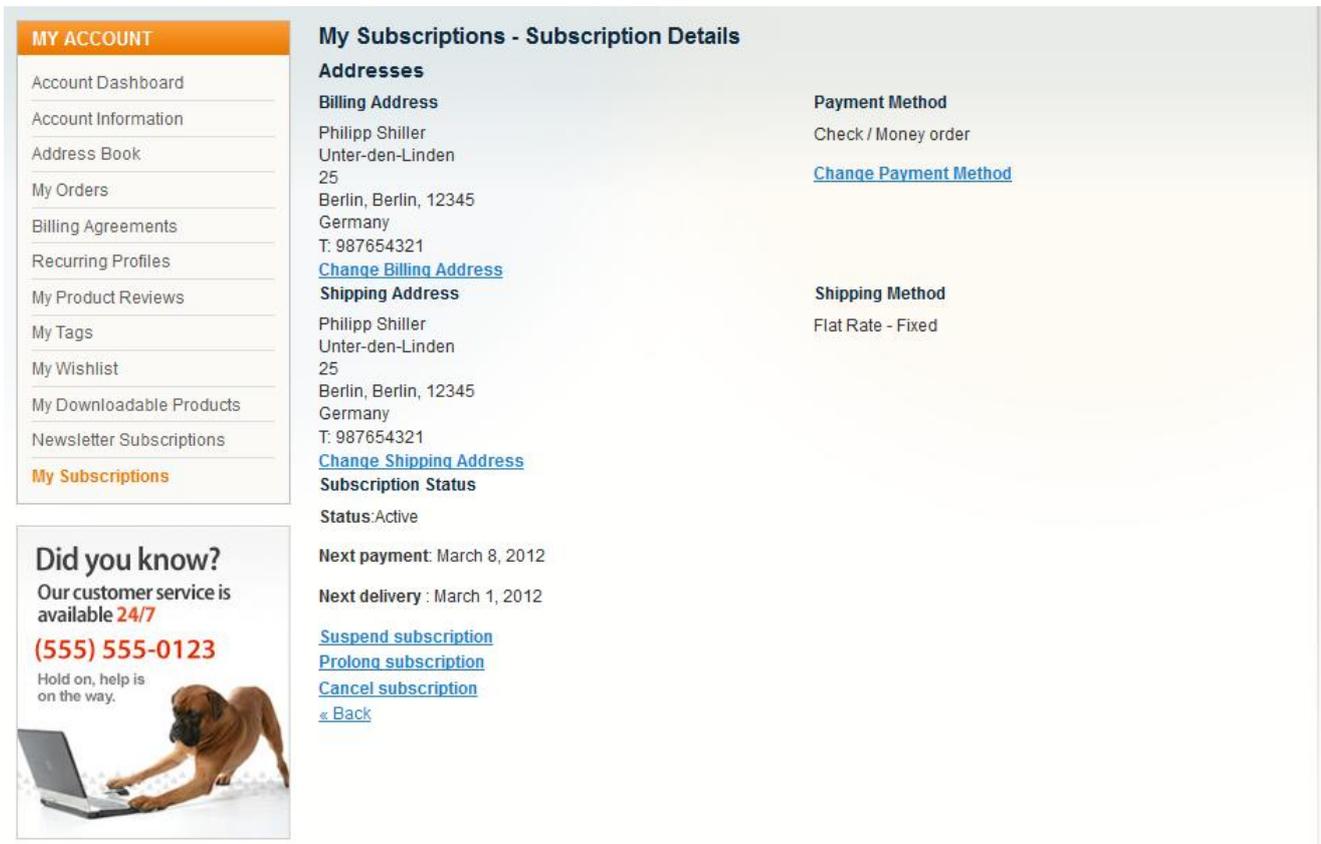
[Back](#)

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/Canceling 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:



**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 - Subscription Details**

**Addresses**

**Billing Address**  
Philipp Shiller  
Unter-den-Linden  
25  
Berlin, Berlin, 12345  
Germany  
T: 987654321  
[Change Billing Address](#)

**Shipping Address**  
Philipp Shiller  
Unter-den-Linden  
25  
Berlin, Berlin, 12345  
Germany  
T: 987654321  
[Change Shipping Address](#)

**Payment Method**  
Check / Money order  
[Change Payment Method](#)

**Shipping Method**  
Flat Rate - Fixed

**Subscription Status**  
Status: Active  
Next payment: March 8, 2012  
Next delivery : March 1, 2012  
[Suspend subscription](#)  
[Prolong subscription](#)  
[Cancel subscription](#)  
[« Back](#)

**Did you know?**  
Our customer service is available **24/7**  
**(555) 555-0123**  
Hold on, help is on the way.



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.

**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

Show  per page

Product(s)	Last order amount	Price	Start	Expires	Period	Next payment	Next delivery	Status	
<a href="#">Sports Illustrated</a> (1)	\$582.49	\$15.00	2/1/12	3/2/12	Once a Week	2/3/12	2/1/12	Canceled	<a href="#">Edit</a> <a href="#">Payments</a> <a href="#">History</a>

1 Item(s) Show  per page

[« Back](#)

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.

**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 - Subscription Details

**Addresses**

**Billing Address**

Philipp Shiller  
Unter-den-Linden  
25  
Berlin, Berlin, 12345  
Germany  
T: 987654321

**Shipping Address**

Philipp Shiller  
Unter-den-Linden  
25  
Berlin, Berlin, 12345  
Germany  
T: 987654321

**Subscription Status**

Status: Suspended by customer

[Activate subscription](#)  
[Prolong subscription](#)  
[Cancel subscription](#)  
[« Back](#)

**Payment Method**

Check / Money order

**Shipping Method**

Flat Rate - Fixed

**Did you know?**  
Our customer service is available **24/7**  
**(555) 555-0123**  
Hold on, help is on the way.



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

**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 - Subscription Details**

**Addresses**

**Billing Address**

Philipp Shiller  
Unter-den-Linden  
25  
Berlin, Berlin, 12345  
Germany  
T: 987654321

**Shipping Address**

Philipp Shiller  
Unter-den-Linden  
25  
Berlin, Berlin, 12345  
Germany  
T: 987654321

**Payment Method**

Check / Money order

**Shipping Method**

Flat Rate - Fixed

**Subscription Status**

Status: Canceled

*This subscription is not active. If you want activate it, please click [here](#).*

[« Back](#)

**Did you know?**  
Our customer service is available **24/7**  
**(555) 555-0123**  
Hold on, help is on the way.



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

**Shopping Cart** Proceed to Checkout

	Product Name		Move to Wishlist	Unit Price	Qty	Subtotal	
	<a href="#">Sports Illustrated</a> <b>Subscription type:</b> Once a Week  <b>First delivery:</b> 1/31/12	<a href="#">Edit</a>	<input type="checkbox"/>	\$15.00	<input type="text" value="1"/>	\$15.00	

Continue Shopping
Update Shopping Cart

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:

**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 - Subscription Details**

**Addresses**

**Billing Address**  
Philipp Shiller  
Unter-den-Linden  
25  
Berlin, Berlin, 12345  
Germany  
T: 987654321  
[Change Billing Address](#)

**Shipping Address**  
Philipp Shiller  
Unter-den-Linden  
25  
Berlin, Berlin, 12345  
Germany  
T: 987654321  
[Change Shipping Address](#)

**Payment Method**  
Check / Money order  
[Change Payment Method](#)

**Shipping Method**  
Flat Rate - Fixed

**Subscription Status**  
Status: Active  
Next payment: March 8, 2012  
Next delivery: March 1, 2012  
[Suspend subscription](#)  
[Prolong subscription](#)  
[Cancel subscription](#)  
[Back](#)

**Did you know?**  
Our customer service is available **24/7**  
**(555) 555-0123**  
Hold on, help is on the way.

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

**Shopping Cart** [Proceed to Checkout](#)

Product Name	Move to Wishlist	Unit Price	Qty	Subtotal
 <a href="#">Sports Illustrated</a> <i>Subscription type:</i> Once a Week <i>First delivery:</i> 1/31/12	<a href="#">Edit</a> <input type="checkbox"/>	\$15.00	1	\$15.00

[Continue Shopping](#) [Update Shopping Cart](#)

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.