

# Advanced Subscription Products

## for Magento 2



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## Getting Around

**Magento 2 Advanced Subscription Products** allows adding adjustable subscription plans to simple, configurable, downloadable, and virtual products. With the embedded mixed cart functionality, customers can add both one-off and subscription products to the same shopping cart. Store admins can notify subscribers on each billing status update by email. Those customers who ordered several subscriptions falling under the same delivery date will be able to pay the delivery price of one subscription (as per a single order).

**Compatibility:** Magento Open Source 2.2.X, Magento Commerce 2.2.X

## Extension Logic

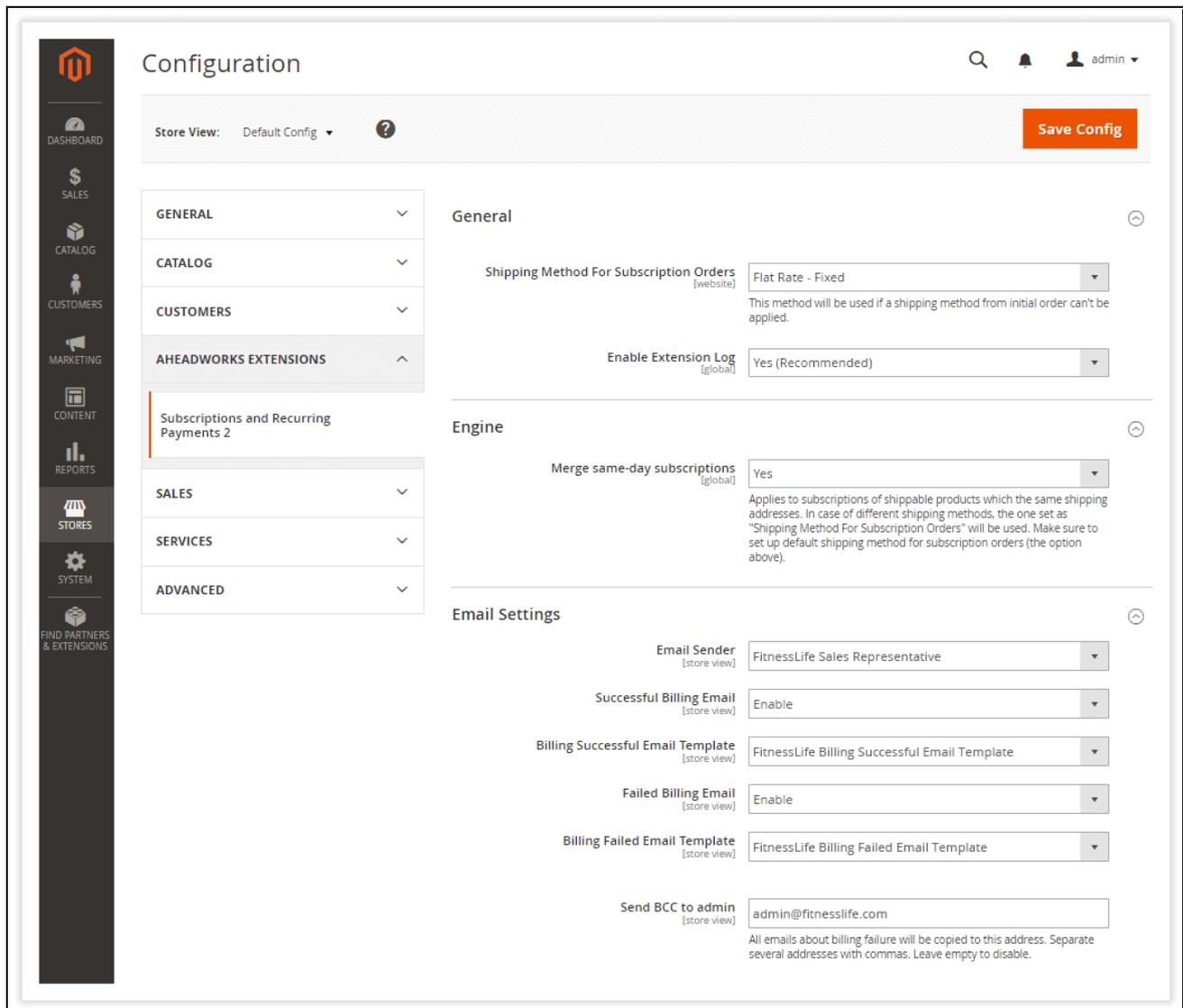
The Advanced Subscription Products module allows store admins to separately manage subscription plans and all existing subscriptions. After a new plan is created, it can be assigned to one or several products in a store. Each product can have multiple subscription options (plans). The assigning process itself takes place on the product level so subscriptions are added to each product individually. The provided subscription functionality can be configured in a store along with subscriptions provided by the **SARP 1** module.

For this release, we got rid of the separate shopping car for subscription products. Thus, customers can add any combinations of both single and repeat purchases to the same Magento 2 cart. If a product has multiple subscription plans and/or it is available as both the one-off and the subscription one, all the available purchase options are listed in the designated subscription plan selector.

# Backend Configuration

## Extension Settings

Start configuring the extension by going to **Stores > Configuration > AHEADWORKS EXTENSIONS > Subscription and Recurring Payments 2**.



The parameters on the '**Configuration**' page are divided into three sections, allowing you to separately configure each aspect of the module: '**General**', '**Engine**', and '**Email Settings**'.

The '**General**' parameter set includes two options:

- **Shipping Method For Subscription Orders** - the default shipping method for subscriptions: flat rate (fixed) or table rate (best way);

- **Enable Extension Log** - enable the option if you need the module to log subscription updates and customer and store admin actions.

If logging is enabled, all information about subscription-related transactions (events) will be added to a text file on a server. This information does not contain any customer personal data and is listed as entity ID's, including subscription and customer ID's, the number of payment attempts left for the related subscription, subscription status, etc.

The extension logs the following:

```
/var/log/aw_sarp2/engine.log
```

```
/var/log/aw_sarp2/payment.log
```

In the '**Engine**' section, you need to set up only one parameter:

- **Merge same-day subscriptions** - by setting the option to 'Yes', you will group subscriptions with same delivery dates into single orders (so that customers can save on shipping).

Lastly, the '**Email Settings**' section encompasses the following parameters:

- **Email Sender** - the name of the default email sender;
- **Successful Billing Email** - enable/disable email alerts about successful subscription billing;
- **Billing Successful Email Template** - the email template for successful subscription billing alerts;
- **Failed Billing Email** - enable/disable email alerts about failed subscription billing;
- **Failed Billing Email** - the email template for failed subscription billing alerts;
- **Send BCC to admin** - the email address of the admin BCC's must be sent to.
- **Send Reminder About Next Billing, Days** - the number of days before the next billing when the corresponding email reminder must be sent.
- **Next Billing Email Reminder Template** - the email template for next billing reminders.

In order to send invoice emails to customers, view the required invoice in **Sales > Invoices** and click on the '**Send Email**' button. In future releases, Magento 2 admins will be able to send invoices automatically by configuring the corresponding option on the '**Configuration**' page.

## Creating and Editing Subscription Plans

Having configured the main extension settings, you may start creating subscription plans for your products. Go to **Sales > SARP 2 by AheadWorks > Plans**.

Subscription plans are the core elements of the extension. They can be shared among multiple products with individual subscription options, including initial fees, trial, and regular periods. All the created plans are listed in the dedicated grid.

ID	Name	Status	Initial Fee	Trial Period	Total Number Of Payments	Number Of Trial Payments
1	3-month Subscription	Enabled	Yes	No	4	0
2	1-month Subscription	Enabled	Yes	No	3	0
3	3-week Subscription	Enabled	Yes	No	4	0

The data contained in the '**Plans**' grid is divided into in the following columns:

- **ID** - an ID of a subscription plan;
- **Name** - the plan's title;
- **Status** - the status of the plan (enabled or disabled);
- **Initial Fee** - the column shows whether the initial fee is charged within the plan;
- **Trial Period** - the column shows whether the trial period is provided within the plan;
- **Total Number of Payments** - the total number of payments required by the plan;

- **Number of Trial Payments** - the number of trial payments required by the plan (if the trial period is provided).

The '**Actions**' drop-down above the grid allows you to manage your subscription plans one by one or in bulk:

- **Enable** - enable the selected plan(s);
- **Disable** - disable the selected plan(s);
- **Delete** - delete the selected plan(s).

To create a new plan, click on the 'Add Plan' button at the top right of the page.

Now, we will explore plan settings.

### Edit Plan

Plans ▾ ← Back Delete Save

---

#### General

Enabled  Yes

Name \*   
Visible in admin panel only.

---

#### Schedule

Number Of Payments   
Leave 0 or empty for infinite subscription.

Repeat Payments

---

#### Additional Pricing Settings

Enable Initial Fee  Yes

Enable Trial Period  No

Regular payment price (% of product price) \*

Price Rounding \*

---

#### Storefront Description

For your convenience when creating/editing subscription plans, the settings are split into four sections: '**General**', '**Schedule**', '**Additional Pricing Settings**', and '**Storefront Description**'.

In the '**General**' section, you can **enable** the plan and specify its **name**.

Then, schedule your plan by defining the **number of payments** and payment frequency (the '**Repeat Payments**' drop-down). You can create infinite subscription plans by leaving the '**Number Of Payments**' field empty.

The '**Additional Pricing Settings**' section allows you to do the following:

- Enable the **initial fee** for the plan;
- Enable the **trial period** for the plan;
- Indicate the **number of trial payments** if the trial period is enabled;
- Set the **regular payment price (% of product price)**;
- Set the **trial payment price (% of product price)** if the trial period is enabled;
- Define the **price rounding logic** for the plan (up to XX.99, XX.90, or X9.00, down to XX.99, XX.90, or X9.00, or don't round).

For multiple store views, the extension allows indicating individual subscription plan titles. You can do this in the '**Storefront Description**' section.

## Adding Subscription Plans to Products

Now let's see how the created subscription plan(s) can be added to products. Go to **Catalog > Products** and open any product page.

The screenshot displays the 'Energy Coffee' product page. At the top right, there are navigation buttons: 'Back', 'Add Attribute', and 'Save'. Below the product name, there are several expandable sections: 'Customizable Options', 'Product in Websites', 'Design', 'Schedule Design Update', 'Gift Options', and 'Sarp2: Subscription Configuration'. The 'Sarp2: Subscription Configuration' section is expanded, showing a 'Subscription [website]' dropdown set to 'Optional'. Below this is a table of 'Subscription Options' with columns for 'Website', 'Plan', 'Initial Fee \*', 'Trial \*', and 'Regular \*'. Two rows are visible, each representing a different plan configuration. The first row shows a '3-month Subscription' with an initial fee of \$ 5.00 and a regular price of \$ 6.99. The second row shows a '1-month Subscription' with an initial fee of \$ 3.00 and a regular price of \$ 6.75. Each row has checkboxes for 'Use plan settings' and a trash icon. An 'Add' button is located at the bottom of the table.

In the '**Sarp 2: Subscription Configuration**' menu, you can completely configure individual plan settings for each particular product.

First, define in which variants your product will be available (use the '**Subscription**' drop-down for this purpose):

- **No** - the product will be available only as a one-off purchase;
- **Optional** - the product will be available both as a subscription and one-off purchase;
- **Subscription only** - the product will be available only as a subscription.

If you run several websites, you can configure plan parameters for each particular one. Use the '**Website**' drop-down to select the appropriate website.

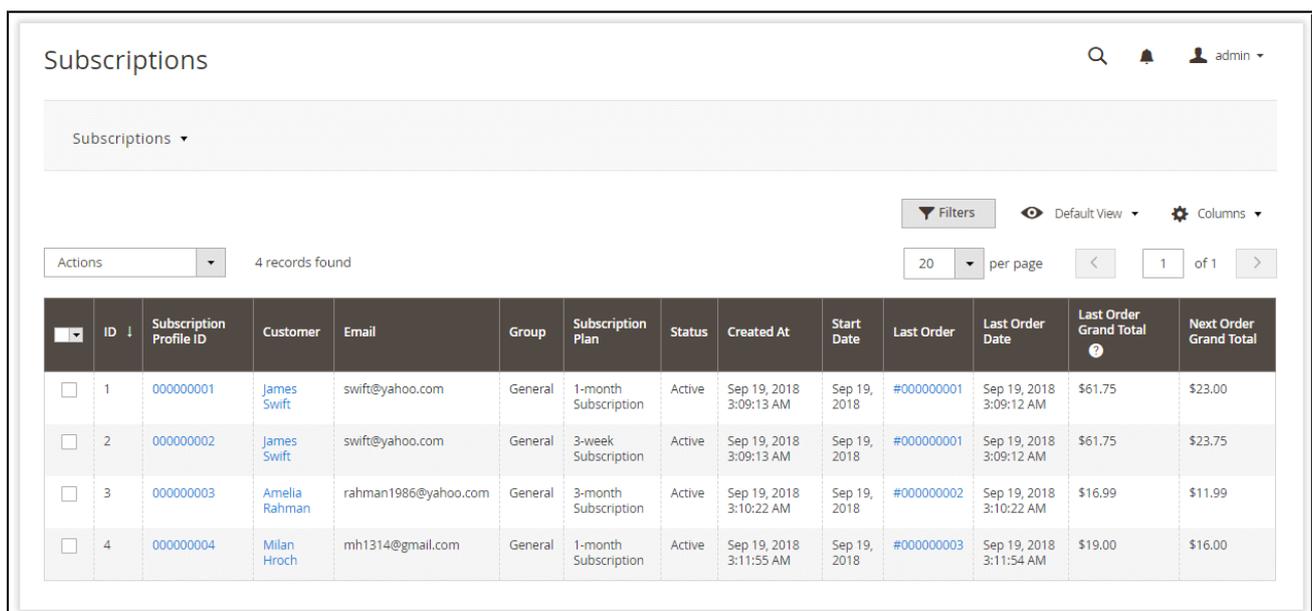
Choose the required subscription plan from the '**Plan**' drop-down. You can share plans among products since all the created plan options will be available in this selector on each product page.

If the initial fee is enabled, the price will be set automatically in % from a product's cost (according to the previously defined rounding logic). You can see the fee's amount in the **'Initial Fee'** field, respectively. Or, you can set the initial fee manually.

Trial and regular payments can be set manually for each plan or assigned automatically based on the product's price. For automatic price calculation, mark the **'Use plan settings'** checkbox. Click **'Save'** at the top right of the page to apply the configured parameters.

## Managing Subscriptions

Once the plans have been assigned to the product, the product becomes available for purchase in the store. To monitor all active subscribers, go to **Sales > SARP 2 by AheadWorks > Subscriptions**.



The screenshot shows a web interface for managing subscriptions. At the top, there's a search bar and user profile 'admin'. Below that, a breadcrumb trail shows 'Subscriptions'. There are controls for filters, default view, and columns. A table displays 4 records with columns for ID, Subscription Profile ID, Customer, Email, Group, Subscription Plan, Status, Created At, Start Date, Last Order, Last Order Date, Last Order Grand Total, and Next Order Grand Total.

ID	Subscription Profile ID	Customer	Email	Group	Subscription Plan	Status	Created At	Start Date	Last Order	Last Order Date	Last Order Grand Total	Next Order Grand Total
1	000000001	James Swift	swift@yahoo.com	General	1-month Subscription	Active	Sep 19, 2018 3:09:13 AM	Sep 19, 2018	#000000001	Sep 19, 2018 3:09:12 AM	\$61.75	\$23.00
2	000000002	James Swift	swift@yahoo.com	General	3-week Subscription	Active	Sep 19, 2018 3:09:13 AM	Sep 19, 2018	#000000001	Sep 19, 2018 3:09:12 AM	\$61.75	\$23.75
3	000000003	Amelia Rahman	rahman1986@yahoo.com	General	3-month Subscription	Active	Sep 19, 2018 3:10:22 AM	Sep 19, 2018	#000000002	Sep 19, 2018 3:10:22 AM	\$16.99	\$11.99
4	000000004	Milan Hroch	mh1314@gmail.com	General	1-month Subscription	Active	Sep 19, 2018 3:11:55 AM	Sep 19, 2018	#000000003	Sep 19, 2018 3:11:54 AM	\$19.00	\$16.00

The **'Subscription'** grid contains the data on all subscribers divided into the following columns:

- **ID** - an ID of a subscription;
- **Subscription Profile ID** - an ID of a subscription profile;
- **Customer** - the name of a subscriber;
- **Email** - the subscriber's email address;
- **Subscription Plan** - the plan purchased by the subscriber;
- **Status** - the current subscription status (active, suspended, or canceled);
- **Last Order** - the last order's ID;

- **Last Order Date** - the last order's date.

From the '**Actions**' drop-down above the grid, you can change the status of the selected subscription(s).

If a customer deletes his/her account, his/her active subscriptions won't be suspended or canceled. Instead, those subscriptions will be marked as the guest ones. They can be merged if the merging conditions (see Extension Settings) are fulfilled. This is the only case when guest orders can merge.

The backend configuration of the module is completed. Now, let's see how the configured subscriptions work on the storefront.

## Subscriptions on the Storefront

All subscription plans available for the product are listed in the subscription plan selector provided on the corresponding product page along with the detailed info on each particular plan.

The screenshot displays the LUMA storefront product page for 'Power Protein HD'. The page features a navigation menu with categories like 'What's New', 'Women', 'Men', 'Gear', 'Training', and 'Sale'. The product image shows a blue tub of 'POWER PROTEIN HD' with a label indicating '34', '102', and '11' units. The price is listed as '\$8.75' and is marked as 'IN STOCK'. The product details section includes a 'Subscription details' table and a 'Qty' selector.

Subscription details	
First payment	\$13.75 (inc. \$5.00 initial fee)
Regular payments	2 x \$8.75
Billing Cycle	Every 2 Weeks

Qty: 1

[Add to Cart](#)

[Instant Purchase](#)

[ADD TO WISH LIST](#) [ADD TO COMPARE](#) [EMAIL](#)

If the '**Subscription**' option was previously set to '**Optional**', the product will be also available in the one-off purchase variant.

Thanks to the mixed cart functionality, customers can add any combinations of one-off purchases and subscriptions to their shopping carts.

**LUMA** Search entire store here...

What's New Women Men Gear Training Sale

## Shopping Cart

Item	Price	Qty	Subtotal
Energy Coffee	\$27.00	1	\$27.00
Power Protein HD	\$11.75	1	\$11.75

Move to Wishlist

**First payment:** \$11.75 (inc. \$3.00 initial fee)  
**Regular payments:** 3 x \$8.75  
**Billing Cycle:** Weekly

Move to Wishlist

### Summary

Estimate Shipping and Tax

Subtotal \$51.75  
Tax \$0.00

**YOU PAY NOW**

**Order Total \$51.75**

[Proceed to Checkout](#)

Customers can view all purchased subscriptions in the '**My Subscriptions**' tab in their accounts.

**LUMA** Search entire store here...

What's New Women Men Gear Training Sale

## My Subscriptions

- Account Dashboard
- My Orders
- My Downloadable Products
- My Wish List
- Address Book
- Account Information
- Stored Payment Methods
- Billing Agreements
- My Product Reviews
- Newsletter Subscriptions
- My Subscriptions**

Profile ID	Status	Product(s)	Subscription Plan	Next Payment Date	Next Payment Amount	Actions
000000001	Active	Strength Protein XL	1-month Subscription	Oct 3, 2018	\$23.00	<a href="#">Cancel</a>
000000002	Active	Power Protein HD	3-week Subscription	Sep 26, 2018	\$23.75	<a href="#">Cancel</a>

2 Item(s) Show  per page

Each individual subscription can be canceled anytime by clicking on the '**Cancel**' active link in the '**Actions**' column.

Note that subscriptions with the same delivery date will be combined in a single order. In this case, the delivery price will be calculated as for one subscription delivery.

For an in-depth look visit Product Labels demo store at the extension's [product page](#).

Feel free to contact our support team with any questions:

[Submit a help desk ticket](#)

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