

2. Subscriptions and Recurring Payments User Guides

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this help file, please feel free to email via our user page contact form here. Thanks so much!

By: Magenest | Email: <http://servicedesk.izysync.com/servicedesk/customer/portal/23>

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Introduction

Subscriptions and Recurring Payments extension for Magento 2 is the exclusive special feature that has been equipped with the Magento-powered store with the feature of subscription and recurring payment. Simply, when this extension is added to increase recurring revenue stream, your business model will become more and more developed and diversified.

Subscriptions and Recurring Payments extension provides all options for merchants to configure subscription products such as magazines, newspapers, newsletters or memberships, etc. All things become easy and simple with this extension. It helps customers save time to buy products from repeating order process. And you will no longer need to invoice your individual customers for each payment. Therefore, it is one of the most helpful solutions.

For Magento Subscriptions & Recurring Payments extension, you as a merchant will be able to configure subscription options for your products as desire, manage your subscribers' status and monitor recurring cycles.



Features

- **Subscriptions and Recurring Payments extension** enables you to fully control subscription options and manage subscription profiles.
- **Customer Can Define Start Date** provides merchants options to set whether the customer can define the start subscription date or not.
- **Maximum Payment Failures** enables merchants to set a number of scheduled payments that can fail before subscription profile is automatically suspended.
- **Auto Bill on Next Cycle** helps merchants to automatically bill the outstanding balance amount in the next billing cycle.
- **Multiple billing options** allow merchants to create different billing periods.
- **Enable Trial** (Trial Billing Amount, Trial Billing Period Unit, Trial Billing Frequency, Trial Billing Cycles, Enable Initial Fee) provides merchants option whether to set a trial subscription for customers or not.
- **Payment Profiles Manager** allows merchants to manage subscription cycles, monitor profiles status or delete a profile.

Video Tutorial Playlist

(Go to the playlist to view more: <https://www.youtube.com/playlist?list=PLQgckfH7zIZsgwTPTGF7035wtVac0bXc->)

Payment Methods

Subscriptions and Recurring Payments extension supports following payment methods:

- PayPal Express Checkout.
- Credit Card Direct Post ([Authorize.net](#)) **(NEW)**.

System Requirements

Your store must be running on Magento Community Edition version **2.1.x, 2.2.x**

Configuration

Configure Paypal and Authorize.net Payment Method

- On **Dashboard** tab, click **Magenest Subscription** -> **Settings** > **Sales** > **Payment Methods**

This extension supports Paypal and Authorize.net Payment

The screenshot shows the Magento Configuration interface. On the left is a sidebar with navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, MAGENEST SUBSCRIPTION, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main area is titled 'Configuration' and includes a 'Store View' dropdown set to 'Default Config' and a 'Save Config' button. A list of configuration categories is on the left, with 'SALES' expanded to show 'Sales', 'Sales Emails', 'PDF Print-outs', 'Tax', 'Checkout', and 'Shipping Settings'. The 'Payment Methods' section is active, displaying a list of payment methods with expandable options (indicated by arrows): Merchant Location, Braintree, PayPal Payment Solutions (highlighted with a red box), Check / Money Order, Bank Transfer Payment, Cash On Delivery Payment, Zero Subtotal Checkout, Purchase Order, and Authorize.net Direct Post (highlighted with a red box). A speech bubble points to the 'PayPal Payment Solutions' option with the text: 'Our extension supports Paypal, and Authorize.net Payment'.

+ PayPal Payment Solutions: set up Paypal payment. On **Paypal Payment Standard** section and hit **Required PayPal Settings**.

- Enter your **Email Associated with PayPal Merchant Account** as required.
- Select **API Signature** in **API Authentication Methods**.
- Enter **API Username**, **API Password** and **API Signature** associated with your PayPal account. To get your PayPal Credentials, click on **Get Credentials from Paypal** button, to get a sandbox credentials, click on **Sandbox Credentials** button
- Select **Yes** in **Sandbox Mode** if you are using a sandbox PayPal account or **No** if you go live.
- On the top right corner, click **Save Config**.
- Choose **Yes** in **Enable this Solution** to enable Paypal Payment.

⏪ Required PayPal Settings

⏪ Website Payments Standard

Email Associated with PayPal Merchant Account [website]	qhauict13@gmail.com ?
	Start accepting payments via PayPal
API Authentication Methods [website]	API Signature ▼
API Username [website]	
API Password [website]	
API Signature [website]	
	Get Credentials from PayPal
	Sandbox Credentials
Sandbox Mode [website]	Yes ▼
API Uses Proxy [website]	No ▼

✓ Enable this Solution [website]	Yes ▲
--	------------------------------------

+ Authorize.net Direct Post:

- **Enabled:** Choose Yes to enable this method
- **Payment Action:** You can choose Authorize Only or Authorize and Capture
 - **Authorize Only (Authorization):** will check the card for validity but not charge the account yet until the order is approved and invoiced.
 - **Authorize and Capture(Sale):** will charge the debit/credit card at the time of the order submission.
- **Title:** The title of the payment method that will be displayed on the checkout page
- **API Login ID:** Getting from the Authorize.net account.
- **Transaction Key:** Get from the [Authorize.net](#) account.
- **Merchant MD5:** Authorize.net MD5 Hash
- **New Order Status:** You can choose between Processing and Suspected Fraud
 - **Processing:** The payment is made successfully and an order invoice is issued.
 - **Suspected Fraud:** No invoice is issued.
- **Test Mode:** Turn this on (Yes) if you use the test credentials.
- **Gateway URL:** If you use the sandbox mode, the URL is <https://test.authorize.net/gateway/transact.dll> ; if you go live, the URL is <https://secure.authorize.net/gateway/transact.dll>
- **Transaction Details URL:** <https://api2.authorize.net/xml/v1/request.api>
- **Accepted Currency:** Choose the currency you want the payment to be
- **Debug:** Yes or No
- **Email Customer:** Turn this on (Yes) to send customer email
- **Merchant's Email:** your email

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

MAGENEST SUBSCRIPTION

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Configuration

Authorize.net Direct Post

Save Config

Enabled

Yes

Use system value

Payment Action

Authorize Only

Use system value

Title

Credit Card Direct Post (Authorize.net)

Use system value

API Login ID

Use system value

Transaction Key

Use system value

Merchant MD5

Use system value

New Order Status

Processing

Use system value

Test Mode

Yes

Use system value

Gateway URL

https://test.authorize.net/gateway/transact.dll

Use system value

Transaction Details URL

https://api2.authorize.net/xml/v1/request.api

Use system value

Accepted Currency

US Dollar

Use system value

Debug

No

Use system value

Email Customer

Yes

Use system value

Merchant's Email

ghauict13@gmail.com

Use system value

- **Credit Card Types:** You can choose which credit card types you want by choosing one or more items.
- **Credit Card Verification:** Choose Yes to enable CVC Verification.
- **Payment from Applicable Countries:**
 - **All allowed countries:** Enable all allowed countries to make payment.
 - **Specific Countries:** Restrict some countries by unselecting them from the **Payment from Specific Countries**.

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

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REPORTS

MAGENEST SUBSCRIPTION

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Configuration

Credit Card Types

Save Config

Credit Card Types

American Express

Visa

MasterCard

Discover

Other

Use system value

Credit Card Verification

Yes

Use system value

Payment from Applicable Countries

All Allowed Countries

Use system value

Payment from Specific Countries

Botswana

Bouvet Island

Brazil

British Indian Ocean Territory

British Virgin Islands

Brunei

Bulgaria

Burkina Faso

Burundi

Cambodia

Use system value

Minimum Order Total

1

Use system value

Maximum Order Total

100000

Use system value

Sort Order

Use system value

Click on **Save Config** button to save data entered.

Configure other subscription settings

To configure the Subscription, go to **Magenest Subscription > Settings > Sales > Subscription Settings**

Here you can set:

+ General settings

- **Display style on product detail page:** Subscription options on the frontend product detail page will be displayed as **Dropdown** or **Radio list**
- **Logged in customer only:** Only logged in customer can buy subscription products.
- **Create order for first time subscription:** Order will be created along with new subscription profile
- **Debug:** Enable debugging

+ Paypal

- **Initial Payment Failure Action:** You can choose whether to Continue payment on failure or cancel it.
- **Create new order for new billing cycle:** Whether to create new order for new billing circle
- **Allow customer to cancel profile:** Whether to allow customer to cancel profile from frontend
- **Allow customer to reactivate profile:** Allow customer to reactivate their subscription profile from frontend

Configuration

GENERAL

CATALOG

CUSTOMERS

SALES

SALES

Quotes

Sales Emails

PDF Print-outs

Tax

Checkout

Shipping Settings

Multishipping Settings

Shipping Methods

Google API

Fraud Protection

Gift Cards

Payment Methods

General

Display style on product detail page [store view] Radio List ☐ Use system value

Choose your display style

Logged in customer only [website] No ☐ Use system value

Only registered customers can add subscription product to cart

Create Order for first time subscription [website] Yes ☐ Use system value

Whether extension allows create order when customer subscribe a recurring billing for the first time

Debug [website] Yes ☒ Use system value

Paypal

Initial Payment Failure Action [website] Continue on failure ☒ Use system value

Create New Order for new Billing Cycle [website] Yes ☒ Use system value

Allow customer to cancel profile [website] Yes ☒ Use system value

Allow customer to reactivate profile [website] Yes ☒ Use system value

Login status [website] OK

Authorize.net

Use Reference ID in Sending Requests [website] Yes ☒ Use system value

Create New Order for new Billing Cycle [website] Yes ☒ Use system value

+ Email settings:

- **Email Sender:** Choose the department you want to take charge of sending customers emails
- **Subscription Started:** You can set whether not to send email (**Don't send email**) or send email by email templates when the subscription started
- **Subscription Payment:** You can set whether not to send email (Don't send email) or send email by email templates when the the order is placed
- **Subscription Canceled:** You can set whether not to send email (Don't send email) or send email by email templates when the the the subscription is canceled
- **Subscription Suspended (Paypayl Only):** You can set whether not to send email (Don't send email) or send email by email templates when the subscription is suspended.

Main Functions

- **Create Subscription Product**

You can set subscription for a new or an existing product by going to **Products > Catalog**

For a new product, click **Add Product** or select a product type to start creating a new product on your store.
For existing product, click **Edit**.

Catalog

🔍
 35
 subscription ▼

DASHBOARD

SALES

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MAGENEST SUBSCRIPTION

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Actions ▼

24 records found

Filters

Default

20 per page

	ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity ↓	Visibility	Status	Websites	Action	Size	RAM	SSD
☐	54		member-Yearly	Virtual Product	Default	member-Yearly	\$299.99		Not Visible Individually	Enabled	Main Website	Edit	Size	4GB	256GB
☐	48		SUB MONTHLY	Virtual Product	Default	SUB MONTHLY	\$5.99		Catalog Search	Enabled	Main Website	Edit	Size	4GB	256GB Yes
☐	57		Test Sascha	Virtual Product	Default	Test Sascha	\$101.00		Catalog Search	Enabled	Main Website	Edit	Size	4GB	256GB Yes Yearly
☐	55		member	Configurable Product	Default	member	\$29.99	0.0000	Catalog Search	Enabled	Main Website	Edit	Size	4GB	256GB No
☐	38		Mauve Keyhole High Neck Deep Plunge Jumpsuit	Configurable Product	Default	Mauve Keyhole High Neck Deep Plunge Jumpsuit	\$1,560.00	0.0000	Catalog Search	Enabled	Main Website	Edit	Size	4GB	256GB Yes Monthly
☐	61		bundle	Bundle Product	Default	bundle		0.0000	Catalog Search	Enabled	Main Website	Edit	Size	4GB	256GB No Monthly

Add Product

- Simple Product
- Configurable Product
- Grouped Product
- Virtual Product
- Bundle Product
- Downloadable Product

Subscription Options:

- **Enable Subscription:** Yes/ No.
- **Customer Can Define Start Date:** Yes/ No.
- **Maximum Payment Failures:** Allows you to set the maximum number of times that customer can fail to pay. When the number is reached, an IPN (Instant Payment Notification) message is sent to you and customer's account will be suspended automatically.
- **Auto Bill on Next Cycle:** Yes/ No. Indicates whether you would like PayPal to automatically bill the outstanding balance amount in the next billing cycle. The outstanding balance is the total amount of any previously failed scheduled payments that have yet to be successfully paid. It is one of the following values:
 - **Yes:** PayPal automatically bills the outstanding balance.
 - **No:** PayPal does not automatically bill the outstanding balance.

Subscription Options



Enable Subscription

[global]

☒

Yes

Customer Can Define Start Date

[global]

☒

Yes

Maximum Payment Failures

[global]

Auto Bill On Next Cycle

[global]

☒

Yes

+ Subscription Interval Settings, Click **Add Option** to add subscription plan for the product

Billing Options. Enables you to set billing frequency or cycles.

Billing Options: Enables you to set billing frequency or cycles.
Period-Unit is one of following values: Day, Week, SemiMonth, Month and Year.

Billing frequency is the number of billing period that makes up a billing cycle.

Maximum Billing Cycles: is the number of billing cycles for the payment period.

Select a period unit, enter the number you want to set on Billing Frequency and Maximum Billing Cycles.

- To add other billing options, click **Add Option**.
- To remove a billing option, click **Remove**.

Trial Enabled: Enable Trial Plan
Enable Initial Fee = Yes/ No. Set to **Yes** if you want a system to add a one-time fixed amount payment, which will be taken upfront on subscribing to a product.
Initial Fee Amount specifies the one-time fixed amount payment that customer needs to fulfill.

NOTE: **Authorize.net** does not allow less than **"7 Days"** recurring frequency; **Initial Fee** is also not available

Subscription Interval Settings

NOTE: Authorize.net does not allow less than "7 Days" recurring frequency; Initial Fee is also not available

Add Option

< 1 of 1 >

9

Option Name *

Period Unit *

Billing Frequency *

Maximum Billing Cycles *

Trial Enabled *

Initial Fee Enabled *

Option 1

Day

9

9

Yes

Yes

Amount

Period Unit

Frequency

Billing Cycles

\$ 9

Day

9

9

Initial Amount

\$ 20

5

Option Name *

Period Unit *

Billing Frequency *

Maximum Billing Cycles *

Trial Enabled *

Initial Fee Enabled *

Option 2

Week

5

5

No

No

- Purchase the subscription product in an easy way

After you create the subscription product

At the frontend page, this subscription product will be shown with subscription options: Billing Cycle, Recurring Payment Stop After, Trial Period, Initial Fee and Start Date.

MAUVE KEYHOLE HIGH NECK DEEP PLUNGE JUMPSUIT

Home → Mauve Keyhole High Neck Deep Plunge Jumpsuit



MAUVE KEYHOLE HIGH NECK DEEP PLUNGE JUMPSUIT

Be the first to review this product

\$70.00

✓ In Stock

SKU#: Mauve Keyhole High Neck Deep Plunge Jumpsuit

Color *

Choose an Option...

Subscription Option

Day

Start Date

29/11/2017

undefined

QTY

- 1 +

ADD TO CART



REVIEWS

Radio list option

MAUVE KEYHOLE HIGH NECK DEEP PLUNGE JUMPSUIT

Home → Mauve Keyhole High Neck Deep Plunge Jumpsuit



MAUVE KEYHOLE HIGH NECK DEEP PLUNGE JUMPSUIT

Be the first to review this product

\$70.00

In Stock

SKU#: Mauve Keyhole High Neck Deep Plunge Jumpsuit

Color

Choose an Option...

Subscription Option

☐ One time purchased

☒ Day

Start Date

30/11/2017

undefined

QTY

- 1 +

ADD TO CART



Search entire store here...



Sale Training Women **Subscription Product**

Home > Subscription Product > Magazine

Magazine

Be the first to review this product

\$15.00

IN STOCK
SKU#: Magazine



Billing Cycle	Recurring Payment Stop After	Trial Period	Initial Fee
☒ 9 day	9 cycle(s)	Bills \$9.00 each 9 cycle(s) of 9 day(s)	\$9.00
☐ 5 day	5 cycle(s)	N/A	N/A

Start Date

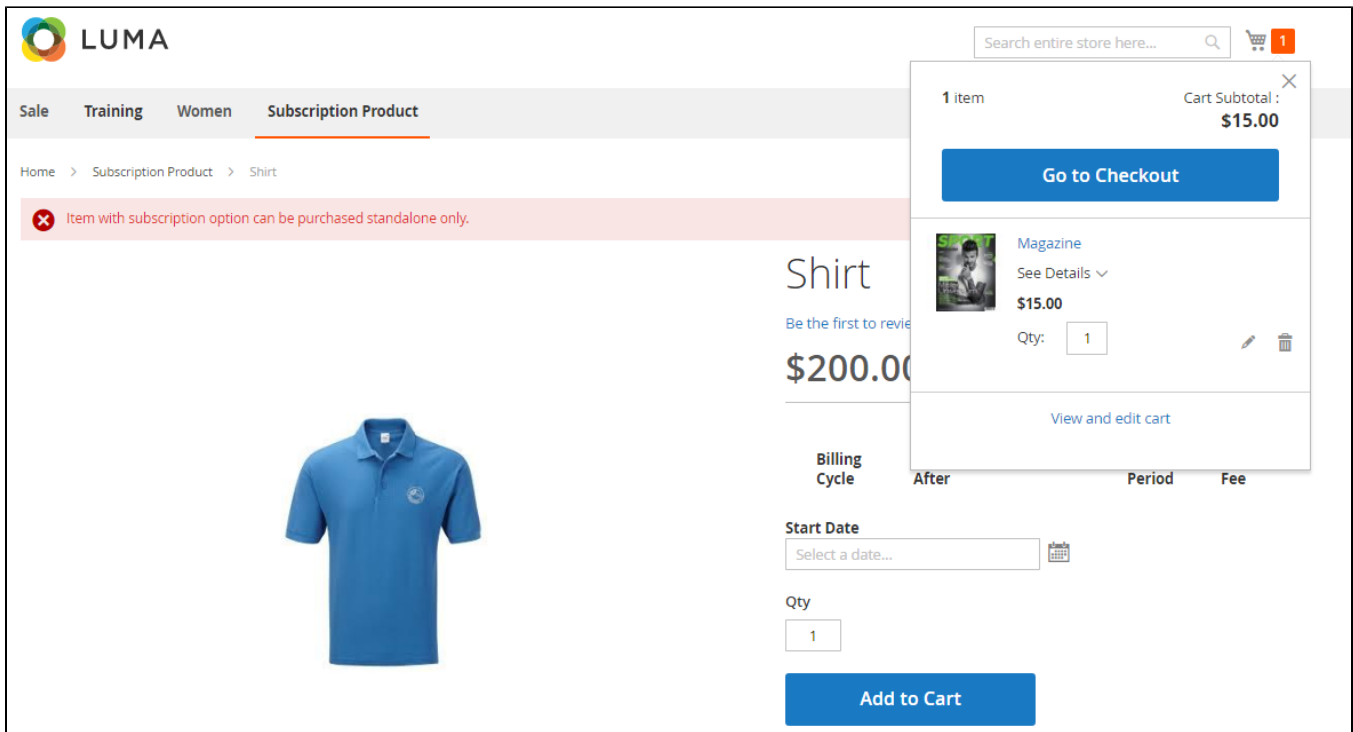
Sat, 20 Aug 2016



Qty

2

Add to Cart

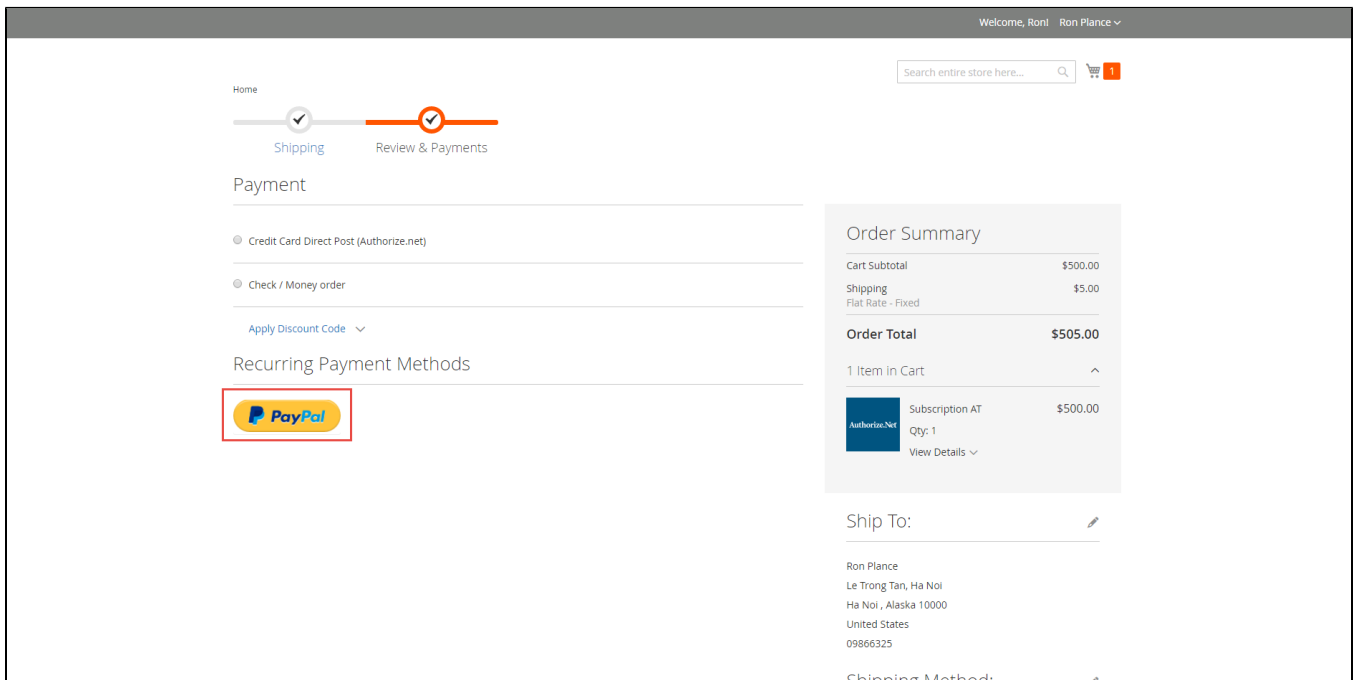


NOTE: For the cart that contains the subscription product, we currently support this cart with only one subscription product, not with one-time purchase product.

At check-out page, there are 2 ways to make Recurring Payment.

- **Payment through PayPal**

Customers fill in their PayPal account to pay their order



- **Payment through Authorize.net**

Customers enter information about Credit card number, expiration date and card verification number. After that, click on "Place Order" button to order.

Payment

☒ Credit Card Direct Post (Authorize.net)

☒ My billing and shipping address are the same
 miss anna
 nguyen chi thanh
 Ha Noi, 10000
 Vietnam
 99599500

Credit Card Number *

Expiration Date *

10 - October

2020

Card Verification Number *

Order Summary

Cart Subtotal	\$30.00
Shipping	\$10.00
Flat Rate - Fixed	
Order Total	\$40.00

2 Items in Cart

	Magazine Qty: 2 View Details	\$30.00
--	--	---------

Ship To:

miss anna
 nguyen chi thanh
 Ha Noi, 10000
 Vietnam
 99599500

- **Manage recurring profiles at front end**

Customers can view and manage all of their orders regarding subscription products by click on **My account > My Recurring Profiles**.

Welcome, miss! miss anna

1

[Sale](#)
[Training](#)
[Women](#)
[Subscription Product](#)

Account Dashboard
 Account Information
 Address Book
 My Downloadable Products
 My Orders
 Newsletter Subscriptions
 My Credit Cards
 Billing Agreements
 My Product Reviews
My Recurring Profiles
 My Wish List

My Recurring Profiles

[Refresh List](#)

Profile ID	Status	Method	Start Date	Regular Amount	Recurring Period	
4236542	Active	Authorize.net Directpost	2016-08-15 04:05:07	510	10 Day cycle. Repeat 5 time(s).	View Profile Order
4237501	Active	Authorize.net Directpost	2016-08-16 08:23:51	50	9 Day cycle. Repeat 9 time(s).	View Profile Order

- **Manage recurring profiles at back end**

You can manage the payment recurring profiles through **Magenest Subscription > Recurring Profiles**. This **Recurring Profiles Manager** provides a table of recurring profiles with information on Profile ID, Status, Method Code, Subscriber Name and Start Date. Customers who have subscribed to your products will be listed here.

Magenest Subscription 42

Recurring Profiles

General Recurring Profile Information

Profile Reference

Payment Method	Authorize.net
Subscription ID	4236542
Status	Active
Subscription Description	Subscription AT
Date of Subscription	2016-08-15 04:05:07
Subscriber Name	miss anna

Recurring Schedule

Start Date	2016-08-16
Maximum Payment Failures	N/A
Billing Period Info	10 Day cycle. Repeat 5 time(s).
Regular Billing Amount	505
Regular Tax Amount	0
Regular Shipping Amount	5

Trial and Initial Fee Information

Trial Fee Information

Period Info	10 Day cycle. Repeat 10 time(s).
Regular Trial Amount	10.00
Trial Tax Amount	-1
Trial Shipping Amount	-1

Initial Fee Information

Initial Fee Not Enabled For This Profile

Product and Shipping Information

Status of the recurring payment profile is one of the following values:

- Active
- Pending
- Cancelled
- Suspended
- Expired

Your subscription customers can check or modify their accounts in **Account Dashboard** in your frontend store. Magenest Subscriptions and Recurring Payments provides an option that customers can cancel or suspend their recurring profiles in your frontend store.

Recurring Profiles Manager

Search by keyword

Filters

Default View Columns Export

20 per page 1 of 1

	Profile ID	Status	Method Code	Subscriber Name	Start Date	Action
☐	4236542	active	authorizenet_directpost	miss anna	2016-08-16	View
☐	4236623	active	authorizenet_directpost	Ron Plance	2016-08-17	View
☐	4236629	active	authorizenet_directpost	Ron Plance	2016-08-16	View
☐	4236649	active	authorizenet_directpost	Ron Plance	2016-08-16	View

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Magenest ver. 2.1.0

[Report Bugs](#)

To check the profile in more details, click **View**. This will lead you to **View Profile** section where provides details information on Profile Reference, Recurring Schedule, Current Status of subscription cycles and Trial Information. The profile information on your backend system will appear the same as on your customer's **Account Dashboard** in frontend store.

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- MAGENEST SUBSCRIPTION
- STORES
- SYSTEM

View Profile 4236542

[← Back](#)

RECURRING PROFILE INFORMATION

- General Profile Information
- Related Order

General Recurring Profile Information

Profile Reference

Payment Method	Authorize.net
Subscription ID	4236542
Status	Active
Subscription Description	Subscription AT
Date of Subscription	2016-08-15 04:05:07
Subscriber Name	miss anna

Recurring Schedule

Start Date	2016-08-16
Maximum Payment Failures	N/A
Billing Period Info	10 Day cycle. Repeat 5 time(s).
Regular Billing Amount	505
Regular Tax Amount	0
Regular Shipping Amount	5

Trial and Initial Fee Information

Trial Fee Information

Period Info	10 Day cycle. Repeat 10 time(s).
Regular Trial Amount	10.00
Trial Tax Amount	-1
Trial Shipping Amount	-1

Initial Fee Information

Initial Fee Not Enabled For This Profile

To delete a profile, on **Recurring Profiles Manager**, check the box in front of the row that has profiles you want to delete, click **Actions > Delete**.

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- MAGENEST SUBSCRIPTION
- STORES
- SYSTEM

View Profile 4236542

subscription

RECURRING PROFILE INFORMATION

- General Profile Information
- Related Order

Search
[Reset Filter](#)
1 records found

20 per page

ID	Purchased Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status
From	From					
To	To					
25	Aug 15, 2016, 4:05:05 AM	2016-08-15 04:05:05	2016-08-15 04:05:05	505.0000	505.0000	505.0000

Update

- When a new update is available, we will provide you with a new package containing our updated extension.
- You will have to delete the module directory and repeat the installing steps above.
- Flush the config cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests within **2 business days**.
- We will offer the **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.