

## 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 vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Magenest Subscription, Stores, System, and Find Partners & Extensions. The main content area is titled 'Configuration' and shows 'Store View: Default Config'. A 'Save Config' button is in the top right. A list of payment methods is displayed, with 'PayPal Payment Solutions' and 'Authorize.net Direct Post' highlighted by red boxes. A callout bubble points to 'PayPal Payment Solutions' 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 <small>[website]</small>	qhauict13@gmail.com <span>?</span> <a href="#">Start accepting payments via PayPal</a>
API Authentication Methods <small>[website]</small>	API Signature ▼
API Username <small>[website]</small>	.....
API Password <small>[website]</small>	.....
API Signature <small>[website]</small>	.....
	<a href="#">Get Credentials from PayPal</a>
	<a href="#">Sandbox Credentials</a>
Sandbox Mode <small>[website]</small>	Yes ▼
API Uses Proxy <small>[website]</small>	No ▼

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<input checked="" type="checkbox"/> Enable this Solution <small>[website]</small>	Yes ▲
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### + 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

Configuration Save Config

Authorize.net Direct Post

Enabled <small>(website)</small>	Yes	<input type="checkbox"/> Use system value
Payment Action <small>(website)</small>	Authorize Only	<input type="checkbox"/> Use system value
Title <small>(store view)</small>	Credit Card Direct Post (Authorize.net)	<input type="checkbox"/> Use system value
API Login ID <small>(website)</small>	*****	
Transaction Key <small>(website)</small>	*****	
Merchant MD5 <small>(website)</small>	*****	
New Order Status <small>(website)</small>	Processing	<input type="checkbox"/> Use system value
Test Mode <small>(website)</small>	Yes	<input type="checkbox"/> Use system value
Gateway URL <small>(website)</small>	https://test.authorize.net/gateway/transact.dll	<input type="checkbox"/> Use system value
Transaction Details URL <small>(website)</small>	https://api2.authorize.net/xml/v1/request.api	<input type="checkbox"/> Use system value
Accepted Currency <small>(website)</small>	US Dollar	<input type="checkbox"/> Use system value
Debug <small>(website)</small>	No	<input type="checkbox"/> Use system value
Email Customer <small>(website)</small>	Yes	<input type="checkbox"/> Use system value
Merchant's Email <small>(website)</small>	qhauict13@gmail.com	

- **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**.

Configuration Save Config

Credit Card Types <small>(website)</small>	<div style="border: 1px solid #ccc; padding: 5px;">         American Express          Visa          MasterCard          Discover          Other       </div>	<input type="checkbox"/> Use system value
Credit Card Verification <small>(website)</small>	Yes	
Payment from Applicable Countries <small>(website)</small>	All Allowed Countries	<input type="checkbox"/> Use system value
Payment from Specific Countries <small>(website)</small>	<div style="border: 1px solid #ccc; padding: 5px;">         Botswana          Bouvet Island          Brazil          British Indian Ocean Territory          British Virgin Islands          Brunei          Bulgaria          Burkina Faso          Burundi          Cambodia       </div>	
Minimum Order Total <small>(website)</small>	1	
Maximum Order Total <small>(website)</small>	100000	
Sort Order <small>(website)</small>		

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

The screenshot shows the 'Configuration' page with a sidebar on the left containing navigation icons for Dashboard, Sales, Customers, Marketing, Content, Reports, Subscription, Stores, System, and Partners. The main content area is divided into sections: 'General', 'Paypal', and 'Authorize.net'. Each section contains various settings with dropdown menus and checkboxes for 'Use system value'.

Section	Setting Name	Value	Use System Value
General	Display style on product detail page	Radio List	<input type="checkbox"/>
	Logged in customer only	No	<input type="checkbox"/>
	Create Order for first time subscription	Yes	<input type="checkbox"/>
	Debug	Yes	<input checked="" type="checkbox"/>
Paypal	Initial Payment Failure Action	Continue on failure	<input checked="" type="checkbox"/>
	Create New Order for new Billing Cycle	Yes	<input checked="" type="checkbox"/>
	Allow customer to cancel profile	Yes	<input checked="" type="checkbox"/>
	Allow customer to reactivate profile	Yes	<input checked="" type="checkbox"/>
	Login status	OK	-
Authorize.net	Use Reference ID in Sending Requests	Yes	<input checked="" type="checkbox"/>
	Create New Order for new Billing Cycle	Yes	<input checked="" type="checkbox"/>

### + 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 subscription is canceled
- **Subscription Suspended (Paypal 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**.



**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 >

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Option Name *	Period Unit *	Billing Frequency *	Maximum Billing Cycles *	Trial Enabled *	Initial Fee Enabled *
Option 1	Day	9	9	Yes	Yes

Amount: \$ 9      Period Unit: Day      Frequency: 9      Billing Cycles: 9

Initial Amount: \$ 20

---

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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
<input checked="" type="radio"/> 9 day	9 cycle(s)	Bills \$9.00 each 9 cycle(s) of 9 day(s)	\$9.00
<input type="radio"/> 5 day	5 cycle(s)	N/A	N/A

Start Date

Sat, 20 Aug 2016



Qty

2

**Add to Cart**

**LUMA**

Sale Training Women **Subscription Product**

Home > Subscription Product > Shirt

Item with subscription option can be purchased standalone only.

Shirt

Be the first to review

\$200.00

Magazine  
See Details  
\$15.00  
Qty: 1

Go to Checkout

View and edit cart

Cart Subtotal: \$15.00

Shipping Cycle: After

Billing Cycle: After

Start Date: Select a date...

Qty: 1

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

Welcome, Ron! Ron Plance

Home

Shipping Review & Payments

Payment

Credit Card Direct Post (Authorize.net)  
 Check / Money order

Apply Discount Code

Recurring Payment Methods

PayPal

Order Summary

Cart Subtotal	\$500.00
Shipping Flat Rate - Fixed	\$5.00
<b>Order Total</b>	<b>\$505.00</b>

1 Item in Cart

Subscription AT Qty: 1 <a href="#">View Details</a>	\$500.00
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Ship To:

Ron Plance  
Le Trong Tan, Ha Noi  
Ha Noi, Alaska 10000  
United States  
09866325

Shipping Method:

- **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 \*

Card Verification Number \*

[Place Order](#)

#### Order Summary

Cart Subtotal	\$30.00
Shipping Flat Rate - Fixed	\$10.00
<b>Order Total</b>	<b>\$40.00</b>

2 Items in Cart ^

	Magazine	\$30.00
	Qty: 2	
	<a href="#">View Details</a> <span style="font-size: 0.8em;">v</span>	

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 v

Search entire store here...

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

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- [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	View Profile   Order
4236542	Active	Authorize.net Directpost	2016-08-15 04:05:07	510	10 Day cycle. Repeat 5 time(s).	<a href="#">View Profile</a>   <a href="#">Order</a>
4237501	Active	Authorize.net Directpost	2016-08-16 08:23:51	50	9 Day cycle. Repeat 9 time(s).	<a href="#">View Profile</a>   <a href="#">Order</a>

- **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.

The screenshot shows the 'Magenest Subscription' interface with the 'Recurring Profiles' menu item highlighted. The main content area displays 'General Recurring Profile Information' for a profile with ID 4236542. The information is organized into several sections:

- 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

At the bottom, there is a section for '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.

The screenshot shows the 'Recurring Profiles Manager' interface. It features a search bar, a table of profiles, and various controls. The table contains the following data:

Profile ID	Status	Method Code	Subscriber Name	Start Date	Action
4236542	active	authorizenet_directpost	miss anna	2016-08-16	<a href="#">View</a>
4236623	active	authorizenet_directpost	Ron Plance	2016-08-17	<a href="#">View</a>
4236629	active	authorizenet_directpost	Ron Plance	2016-08-16	<a href="#">View</a>
4236649	active	authorizenet_directpost	Ron Plance	2016-08-16	<a href="#">View</a>

At the bottom of the page, there is a copyright notice: 'Copyright © 2016 Magento Commerce Inc. All rights reserved.' and the version information: 'Magento ver. 2.1.0' with a link to '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.

**View Profile 4236542** ← Back

**RECURRING PROFILE INFORMATION**

- General Profile Information
- Related Order

**General Recurring Profile Information**

Profile Reference		Recurring Schedule	
Payment Method	Authorize.net	Start Date	2016-08-16
Subscription ID	4236542	Maximum Payment Failures	N/A
Status	Active	Billing Period Info	10 Day cycle. Repeat 5 time(s).
Subscription Description	Subscription AT	Regular Billing Amount	505
Date of Subscription	2016-08-15 04:05:07	Regular Tax Amount	0
Subscriber Name	miss anna	Regular Shipping Amount	5

**Trial and Initial Fee Information**

Trial Fee Information		Initial Fee Information	
Period Info	10 Day cycle, Repeat 10 time(s).	Initial Fee Not Enabled For This Profile	
Regular Trial Amount	10.00		
Trial Tax Amount	-1		
Trial Shipping Amount	-1		

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**.

**View Profile 4236542** 🔍 2 notifications 👤 subscription ▾

← Back

**RECURRING PROFILE INFORMATION**

- General Profile Information
- Related Order

Search [Reset Filter](#) 1 records found 20 per page < 1 of 1 >

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.