

# Subscription Products

 This feature must be enabled by Commerce Vision.

## Overview

The Subscription Products feature adds and manages products that are sold on a subscription basis. Such products can be digital items, e.g., e-magazines, data access, software applications, etc. (But they could potentially also be physical products sold on a time frame or renewal basis.) Time frames are user-configured so periods needed can be fine-tuned to suit your subscription products.

Auto-renewal of a subscription product can also be offered as a subscription [product variant](#). For instance, for the same period, a product could be offered at a lower price if the customer selects auto-renewal.

Subscriptions purchased by your customers are managed online through [Subscription Maintenance \(LSC\)](#) in the CMS. By default, subscription management is restricted to Administrators and staff with the appropriate 'Product Subscription' Role set against their CMS login.

## On this page:

- 1. Configure Subscription Products settings
- 2. Set up Subscription Time Frames
- 3. Configure Subscription Products
  - 1. Set product as Subscription Product
  - 2. Set up Master /Child Subscription Product relationship
- 4. Edit Notification Email Content
- 5. Subscription Scheduled Task

## Maintaining Subscription Products

Just like other products on your website, Subscription Products are maintained in [Product Maintenance](#) - used for setting where, how and what will be displayed for a product on your website. When the Product Subscriptions feature is enabled, a product can be set as a subscription product.



Is Subscription Product

With this toggle enabled, subscription-related options such as setting time frames and auto-renewal automatically display. If a Subscription Product has more than one purchasing option, the product and options (variants) need to be organised in a Master/Child product relationship. (You will be familiar with this if you have used the [Product Variants](#) feature.) Here is an example.

### Example

Company ABC Music wants to sell access to their toddler music class. Options are a 6 or 12 month membership on an auto-renewal basis as well as a one week trial. Each option will be set as a unique combination of a 'time frame' and 'recurring' (auto-renew on expiration).

Time frames are manually set to suit specific the product variant offerings. Here, we have set up three time frame values: '6 months', '12 months' and '1 week'.

Variant	Value
Time Frame (Subscription Period)	6 months, 12 months, 1 week
Recurring (auto-renew)	Yes, No

Since the subscription product has variants, we create a Master subscription product with code 'CV168'. Each of the variants (Child products) will have their own Product Codes.

- 6 months + Recurring: Yes
- 12 months + Recurring: Yes
- 1 week + Recurring: No

Both the Master and Child products will be set as 'Is Subscription Product' in their Maintain Product pages. For the Master subscription product, we add all subscription product options as its Child products.

*What your customers see*

Once the subscription Master and Child products are set up and made active, they become visible to customers on your site. Let's say a customer searches for 'music class'. The search results will list the three Child subscription products as well as the Master product (although this can be configured differently, e.g., to only show the Master product or just the Child products).

Your customer can select either the Master product or one of the Child products.

Selecting Master product	Sele
The Master product has been set to display without a price unless a purchasing option is selected.	Each
<b>NOTE</b> - You can set whether your customers can buy directly from the Master product's page.	
	

They select a 'time frame' and 'recurring' value and the price will display. To purchase, they simply add to cart.

	
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#### What happens after order submission?

When your customer successfully purchases a subscription product, apart from the usual order processing steps, their subscription record is saved. A scheduled task that checks for new subscriptions (usually daily) will activate the subscription the next time it runs. The customer can view the subscription details from the Dashboard once logged into your site. They can also edit credit card details and stop auto renew if applicable. By default, an active subscription is associated with a Customer Code (the Customer account level). This allows any Website User assigned to this Customer access to the subscription.



#### Paying for recurring subscriptions

Some payment types are not suitable for subscription products, e.g., Buy Now, Pay Later options. They can be hidden at checkout whenever the Cart contains a recurring subscription product. This option must be implemented by Commerce Vision.

## Step-by-step

This guide helps you configure and maintain subscription products and subscription-related email notifications.

### 1. Configure Subscription Products settings

Check Subscription Products is enabled for your site and basic notification settings have been configured.

1. In the CMS, navigate to **Settings Feature Management Products & Categories**.
2. Ensure the **Product Subscription** toggle is ON and click **Configure**. **NOTE** - If the toggle is not displayed, contact [Commerce Vision](#).

The screenshot shows the 'Feature Management' section of the CMS. On the left is a sidebar with links: Content (12), Payment & Checkout (17), Products & Categories (10), System (12), User (7), and Advanced (3). The 'Products & Categories' link is highlighted. The main area lists various features with their status (Available in CMS) and a 'Configure' button. The 'Product Subscription' feature is highlighted with a red border, indicating it is being configured. Other features shown include Cluster LineType Maintenance, Cost Centres, Custom Catalogues, Integrated Category Maintenance, Most Popular Products, Online Category Maintenance, Product Documents, Product Features, Product Maintenance, Product Media, Product Variants, and Quick View.

3. To enable the feature on your site, toggle ON **Enable Product Subscription**.

The screenshot shows the 'Feature Options' interface. It has a sidebar with 'Feature Options' and 'Features Settings'. The main area shows a single setting: 'Enable Product Subscription' with a green toggle switch.

4. Configure the **Shared Variant Options** settings. **NOTE** - These settings are shared with the [Product Variants](#) feature. Changing a setting here or in Product Variants settings will automatically apply to both features.

The screenshot shows the 'Shared Variant Options' configuration page. It includes sections for 'Default Display Type' (Radio, Value, Allow Display Type Override At Variant), 'Add to Cart Mode' (Child, Allow Product Matrix Mode, Allow Display Type Override, Enforce Stock Security for Variants, Update Master Products With Child Images, Allow Manual Sort Of Product Attributes, Enforce Tag Order Comparison), and other settings like 'Allow Product Matrix Mode' and 'Allow Display Type Override'.

**Default Display Type:** When a subscription product has more than one purchasing option, each one with its values can be offered in the Master Product's page on your website. Select whether to display selectable values as a dropdown list or radio buttons.

**Time Frame**

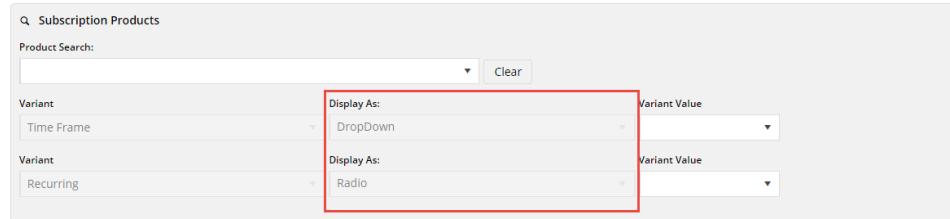
Daily 

**Recurring**

Yes  No

1 

**Allow Display Type Override at Variant Value:** Toggle ON to allow the default display type to be selected individually when each Variant is being configured.



The screenshot shows a table with two rows. The first row has 'Time Frame' under 'Variant' and 'DropDown' under 'Display As'. The second row has 'Recurring' under 'Variant' and 'Radio' under 'Display As'. Both 'Display As' columns have dropdown menus with 'DropDown' and 'Radio' options. The 'DropDown' option is highlighted in the first row's dropdown.

**Add to Cart Mode:** Select either Master or Child. This determines whether the Master or Child product's Code is used when a Child product is added to the cart. If Master is used, the Child product will be added as a note in the order line.

**Allow Product Matrix Mode:** Select whether to allow individual products to be set to matrix display mode, using the Product Variant Grid Widget. Default: OFF

**Allow Display Type Override:** Select whether to allow the 'Default Display Type' to be overridden on a product-by-product basis. Default: OFF. NOTE - If this setting and 'Allow Display Type Override at Variant Value' are both enabled, the latter will be used.

#### Display As: \*

DropDown

DropDown

Radio

**Enforce Stock Security for Variants:** Select whether to apply stock security settings for each child product. Default: OFF

**Update Master Products With Child Images:** Select whether to add Child product images in the Master product gallery automatically. When ON, as the user views each Child product, the image will change to reflect this option. (See our guide on [Automatic image tagging for variants](#) for further details.) Default: OFF

**Allow Manual Sort of Products Attributes:** Select whether to allow re-ordering of products by dragging and dropping. It allows the user to sequence product attributes by drag-and-drop. Toggle on/off as required. Default: OFF.

**Enforce Tag Order Comparison:** Toggle on/off as required. Default: OFF

5. In **Task Options**, configure the scheduled tasks that check for new and expiring subscriptions, sends customer notifications about expiring soon/expired credit cards and subscriptions, and to enforce customer restrictions. See: [Subscription Scheduled Task](#).

**Task Options**  
Configure settings related to Product Subscription Features Settings Tasks

Number of Days Before Credit Card Expiring To Send Email \*  
30 

CC Notifications Email Address List  
 use a comma delimited list.

Product Purchased Procedure  
SpProductSubscriptionPurchased 

Subscription Expired Procedure  
SpProductSubscriptionExpired 

Restricted Customer Status List  
N   
Contains comma/semicolon separated list of Customer Status values. Product Subscription products cannot be ordered by customers having a status that is in this list.

Date to start running scheduled task \*  
2/04/2021 12:01 AM  

Pick a start date. The scheduled task will run every day from that date at the same time of day specified in the date.

- a. **Number of Days Before Credit Card Expiring to Send Email:** Enter the number of days before the customer's credit card expires to send them an alert email. Default: 45 days

- b. **CC Notifications Email Address List:** Enter one or more staff email addresses that will be sent copies of customer notification emails. **NOTE** - If entering multiple email addresses, each must be comma-separated.
- c. **Product Purchased Procedure:** This is the name of automated procedure that checks for newly purchased or auto-renewed subscriptions and provides access. **THIS SHOULD NOT BE CHANGED.** Default: spProductSubscriptionPurchased
- d. **Subscription Expired Procedure:** This is the name of the automated procedure that checks for expired subscriptions and prevents access. **THIS SHOULD NOT BE CHANGED.** Default: spProductSubscriptionExpired
- e. **Restricted Customer Status List:** Customer codes flagged with a status value entered here will be prevented from ordering or renewing subscription products. A popup message will inform the customer they cannot purchase the product. Default: 'N'. **NOTE** - If entering multiple values, each must be comma or semicolon-separated.
- f. **Date to Start Running Scheduled Task:** Enter the date and time for the scheduled task to begin. The task will automatically run daily at the specified time.

6. To save your settings, click **Save** or **Save & Exit**.

## 2. Set up Subscription Time Frames

A **Time Frame** is a subscription period that is applied to subscription products, e.g., 'quarterly' (3-month), 'yearly' (12-month), etc. Each required Time Frame has to be defined and made active so that it can be selected for a subscription Child product. During this process, the schedule for when 'expiring soon' emails are sent to customers is also set.



A Time Frame cannot be deleted if it is being used by a subscription product OR has an active subscription.

To add or edit a Time Frame,

1. In the CMS, navigate to **Product Subscription Subscription Time Frame Maintenance**.
2. The **Subscription Time Frame Maintenance** screen lists all existing Time Frames, indicates whether each one is active (i.e., can be selected to use against a product) and displays the number of products that currently use them. **NOTE** - A Time Frame cannot be deleted if there are products linked to it.

Label	Is Active	Number of Linked Products	Options
Yearly	<input checked="" type="checkbox"/>	2	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Quarterly	<input checked="" type="checkbox"/>	2	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Weekly	<input checked="" type="checkbox"/>	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Fortnightly	<input type="checkbox"/>	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Daily	<input type="checkbox"/>	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

1 - 5 of 5 items

3. To add a new Time Frame, click the **Add New Time Frame** button OR to edit an existing one, click **Edit** next to it.

4. In **Details**, add or change field values as required.
  - a. **Time Frame:** Enter a meaningful name for this subscription period. **TIP** - The name should describe the subscription period clearly. It will be displayed to customers as a selectable value by and to staff when configuring a Child subscription product. **NOTE** - If you are editing an existing Time Frame, the name cannot be changed. If a new name is required, the whole Time Frame has to be deleted and re-added.
  - b. **Is Active:** Tick if the Time Frame is to be usable now for a subscription Child product. Default: unticked.
  - c. **Time Frame Unit & Number of Time Frame Units:** These two fields work together to define the Time Frame ( $\text{Time Frame} = \text{Time Frame Unit} \times \text{Number of Time Frame Units}$ ).  
Example: To create a 'Quarterly' (3-month) Time Frame, in Time Frame Unit, we can select 'Monthly' and enter '3' for Number of Time Frame Units. This defines the 'Quarterly' Subscription Period as '3 Months'.

Time Frame Unit *	Number of Time Frame Units *
<input type="text" value="Monthly"/> <small>?</small> <small>!</small>	<input type="text" value="3"/> <span style="margin-left: 10px;"><small>+</small></span> <span style="margin-left: 10px;"><small>-</small></span>

An alternative would be to select 'Daily' and enter the Number of Time Frame Units of '90' to define the 'Quarterly' Time Frame.

Time Frame Unit *	Number of Time Frame Units *
Daily	90
<input type="button" value="–"/>	<input type="button" value="+"/>

- d. **Days Before Expiry Date to Send User 'Subscription Expiring' Email:** Enter the number of days before this Time Frame expires, for the 'subscription expiring soon' email to be sent to the customer.

5. To save your changes, click **Save** or **Save & Exit**.

### 3. Configure Subscription Products

(NOTE - This guide focuses only on maintaining subscription features. Refer to the general [Product Maintenance](#) help for other aspects of maintaining a product online.)

Configuring subscription products is done in CMS Product Maintenance. Once the Subscription Products feature has been enabled for your site, individual products can be flagged as subscription products. For maintenance, the Master subscription product and each Child product are treated as unique Products (each with its own Product Code) and are then linked using a Master/Child product relationship. Configuring this relationship is a simple process. Products are just added as Child products in the Master product's Product Detail page.



- The standard [Master/Child](#) feature cannot be used with subscription products.
- [Time Frames](#) required should have been created before maintaining the product.

#### 1. Set product as Subscription Product

Every subscription product (both Master and Child products) must be individually set as a Subscription Product.

To set a product as a subscription product:

- In the CMS, navigate to [Product Maintenance](#).
- Find the required product by using the [Product Search](#) tool. You can enter the Product Code or a relevant keyword.
- Click **Edit** for the product.
- In the 'Maintain Product' page, scroll down to the [Product Subscription](#) panel. This is usually at the bottom of the screen. (NOTE - if this panel is not displayed, the [Subscription Products](#) feature has not been enabled.)

- To set the product as a subscription product, toggle ON **Is Subscription Product**. Notice that the 'Subscription Products' section will automatically display. This is used to configure subscription purchasing options and is not relevant for this stage.
- To save your changes, click **Save** or **Save and Exit**.
- Repeat Steps 2-6 for every product linked to this subscription product.

#### 2. Set up Master/Child Subscription Product relationship

All Child products are linked to the Master product in the Master product's page.

To configure related subscription products in the Master/Child relationship:

1. In the CMS, navigate to **Product Maintenance**.
2. Find the Master product by using the **Product Search** tool. You can enter the Product Code or a relevant keyword.
3. Click **Edit** for the product.
4. In the 'Maintain Product' page, scroll down to the **Product Subscription** panel.

The screenshot shows the 'Product Subscription' panel. At the top, there is a search bar labeled 'Q. Subscription Products' with a placeholder 'Product Search:' and a 'Clear' button. Below the search bar are two dropdown menus: 'Variant' and 'Recurring'. The 'Variant' dropdown has options like 'Time Frame' and 'Variant Value'. The 'Recurring' dropdown has an option 'Recurring'. At the bottom of the panel are two buttons: 'Add Subscription' and 'Show Existing Subscriptions'.

5. Add a Child product. In **Product Search**, type in the Child product's Product Code or a relevant keyword and select it from the list.
6. Select Variant values to define the subscription option. **NOTE** - A Child subscription product must have a Time Frame value. The 'Recurring' variant is optional. But if the 'Recurring' variant is used for the first Child product, then all other Child products must have a value. Example: if Recurring is left blank (not used) for the first Child product, subsequent Child products must also be left blank.  
**Time Frame:** select a Time Frame value  
**Recurring:** if using this variant, select either 'Yes' or 'No'

The screenshot shows the 'Variant' settings for a Child product. There are two dropdown menus: 'Time Frame' (set to 'Quarterly') and 'Recurring' (set to 'Yes').

- !**
- Each Child product must have a unique subscription Time Frame (or Time Frame + Recurring if both variants are used). For example, the system will not allow you to add two Child products with the combination: 'Quarterly' + 'Yes'.

An error message will display when you attempt to add a duplicate Child product:

The variant values are the same as an existing child products variant information

7. To link the Child product to this Master product, click **Add Subscription**.

The screenshot shows the 'Add Subscription' dialog box. It has a single input field labeled 'Variant' containing the value 'Size'. At the bottom right are two buttons: 'Save' (highlighted in green) and 'Cancel'.

8. To save this product as a Child product, click the **Save** button (at the top of the screen). **IMPORTANT** - Any changes will not be saved without completing this step.
9. To add other Child products to this Master product, repeat steps 5-7 for each one. You need only Save the page (step 8) when completely finished with adding Child products.

10. After all Child products have been added, check that they and their subscription values are correct. To view them, click **Show Existing Subscriptions**. Each child product will be listed with their variant value combinations.

Active	Product Code	Variants	Options
<input checked="" type="checkbox"/>	CARLAB3MR	Time Frame: Quarterly Recurring: Yes	<input type="button" value="Remove"/> <input checked="" type="checkbox"/> Set As Default Child
<input checked="" type="checkbox"/>	CARLAB3M	Time Frame: Quarterly Recurring: No	<input type="button" value="Remove"/> <input checked="" type="checkbox"/> Set As Default Child
<input checked="" type="checkbox"/>	CARLAB12MR	Time Frame: Yearly Recurring: Yes	<input type="button" value="Remove"/> <input checked="" type="checkbox"/> Set As Default Child
<input checked="" type="checkbox"/>	CARLAB12M	Time Frame: Yearly Recurring: No	<input type="button" value="Remove"/> <input checked="" type="checkbox"/> Set As Default Child

11. You can set other options for each Child product when suitable .

**Active:** Toggle this OFF if you temporarily do not want this child product to be offered to customers.

**Remove:** Click to permanently unlink this Child product.

**Set as Default Child:** if you want a specific Child product to default when the customer first views the Master product, click this button for the Child product.



When a product is a Child product, this message appears at the top of its Maintain Product page. The Master product is provided as a clickable link.

## 4. Edit Notification Email Content

Email templates for subscription-related notifications are located in **Content Emails Product Subscription**. Default email content is provided. This can be edited in subscription widgets in each email template.

To access the email template, navigate to **Content Emails**.

The screenshot shows the 'Email Templates' page with a sidebar navigation on the left. The sidebar includes links for 'My Favourites', 'Orders', 'Payments & Accounts', 'Product Subscription' (which is currently selected), 'Users', and 'Misc'. The main content area displays a table of email templates with columns for 'Name', 'Options', and an 'Edit' button. The listed templates are: 'Product Subscription Card Expired Email Template', 'Product Subscription Card Expiring Email Template', 'Product Subscription Expired Email Template', 'Product Subscription Expiring Email Template', 'Product Subscription Purchased Email Template', 'Product Subscription Renewal Failed Email Template', and 'Product Subscription Renewed Email Template'.

## 5. Subscription Scheduled Task

When the Subscription Products feature is enabled, the **Product Subscription Expiry, Renewals and Creation** task is set up to automatically run daily at a specified time, e.g., 12:01am. This time can be edited in the **Product Subscription Features Settings** page.

The task will perform the following checks and trigger Subscription emails and events:

Check	Events
Subscription purchased	<ul style="list-style-type: none"> <li>New purchases will be processed, the purchasing User will receive an alert email, and all Users linked to the Customer Code will be given access to the product.</li> </ul>

Subscription expiring	<ul style="list-style-type: none"> <li>Subscriptions expiring in X number of days (as set in the <a href="#">Time Frame Maintenance screen</a>) will trigger a 'subscription expiring' email to the User.</li> </ul>
Subscription expired	<ul style="list-style-type: none"> <li>Non-recurring expired subscriptions will trigger the 'Subscription Expired' email to be sent to the User and access to the product will be stopped.</li> </ul>
Subscription renewal	<ul style="list-style-type: none"> <li>For recurring subscriptions, on the expiry date, (i) a charge will be attempted for credit card subscriptions, and (ii) those on account will be renewed. <ul style="list-style-type: none"> <li>If renewal is successful, the User will be sent the 'Subscription Renewed' email and access to the product continues.</li> <li>If a renewal is unsuccessful, the User will be sent the 'Subscription Renewal Failed' email and access to the product is stopped.</li> </ul> </li> </ul>
Credit card expiration	<ul style="list-style-type: none"> <li>For recurring subscriptions, expiration dates on credit cards are checked. <ul style="list-style-type: none"> <li>Those that will expire in X number of days (as set in Product Subscription Settings) will trigger a 'subscription credit card expiring' email to the User.</li> <li>Those that have expired will trigger a 'Product Subscription Card Expired' email to the User.</li> </ul> </li> </ul>

## Additional Information

<b>Minimum Version Requirements</b>	4.31
<b>Prerequisites</b>	
<b>Self Configurable</b>	Yes after initial consultation
<b>Business Function</b>	Catalogue
<b>BPD Only?</b>	Yes
<b>B2B/B2C/Both</b>	B2B
<b>Third Party Costs</b>	n/a

## Related help

- [Subscription Maintenance](#)