

Installation Guide for Magento Subscription Manager

This guide shows the installation and use of the Magento Subscription Manager. The extension can be obtained from www.sellxed.com/shop.

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1 Introduction

This guide shows the installation, configuration and use of the Magento Subscription Manager.

Before starting the installation, please make sure to have all necessary data at hand:

- Administrator access to your Magento Shop
- Magento Subscription Manager from sellxed.com/shop

Installation Service

In case of problems, our support team is at your disposal during regular business our under: <http://www.sellxed.com/en/support>. Furthermore, you have the option of ordering our installation service:
<http://www.sellxed.com/shop/en/integration-und-installation.html>

2 Module Installation

At this point you should already be in possession of the module. If not, the module files can be obtained from your customer account here [sellXed Shop](#) (Menu Item "My Download Products"). In order to install the module in your Magento Shop, follow these steps:

1. Create a backup of your shop
2. Extract the content of the ZIPs that were downloaded from our shop
3. Copy the **complete content** of the folder "files" into the root directory of the server in which your server is located, using your regular FTP program. Make sure that the folders are merged and not replaced.
4. Empty the cache and log into your shop again.

Now the module is installed and can be configured.

Create Backups!

We strongly recommend to create a backup of your shop's root directory. This allows you to go back to the original state any time.

Additionally, we recommend to run the integration on a test system first to avoid any complications due to third party modules. Our support team is always available if you have any questions.

Information on the migration from Subscription Manager v.1 to v.2 is accessible under [Migration](#).

3 How to Configure the Extension

The configuration of the Subscription Manager is divided into two steps. As a first step, the [General Configuration](#) should be completed. The following instructions show how to capture existing or [new products as a subscription](#).

Payment Modules

The Subscription Manager is delivered with payment modules for purchases on account. In order to process credit card payments within the subscription, the respective sellXed.com credit card module is necessary. It can be purchased directly from our shop <http://www.sellxed.com/shop>

3.1 Cron Job Configuration

The plugin creates new orders automatically as soon as the respective controller is triggered via Cron Job. Therefore it is essential to activate Cron Jobs in your Magento Shop. The module employs the standard Magento Cron. The instructions for the configuration can be found [here](#).

The Subscription Cron is triggered every time the Magento Cron is activated. During testing we recommend to trigger the Magento Cron in 1 minute intervals. When migrating to the productive system, Magento recommends a Cron interval of 5 minutes.

3.2 Cron Job Test

It is essential to test the Cron settings before going live. In order to do so, [create a test item](#) with a subscription interval of 10 minutes.

3.3 General Configuration

With the general configuration you can define the general settings for e-mails, supported payment options, etc. The general configuration can be found via **System > Configuration > Subscription**.

3.3.1 Payment Methods

As a first step you can define, which payment methods are accepted for orders via subscription. Only these options will be shown when a customer adds subscription products to his cart.

3.3.2 Payment Deadline

The subscription module is going to create an authorised order according to the payment method settings when the subscription is due. In case you use deferred capture, only an authorisation is created. If you use a payment method with an Alias function and the capture settings are set to direct, a new order is created and the payment is captured directly when the subscription is due.

The payment deadline settings allow you to define a deadline for the customer by which the payment information has to be updated or the bill has to be paid. For invoices, the deadline is the latest date by which the bill has to be paid. If you use deferred capturing, the payment has to be captured within the time limit.

In general, the invoice has to be paid before the deadline is reached, otherwise the subscription will be marked as failed and no new subscription orders will be created.

If a payment fails or if a payment is necessary, the customer will be notified with a reminder email automatically.

3.3.3 E-Mail Settings

The e-mail settings allow you to send specific confirmation e-mails for subscription orders. These can be adjusted for the transaction e-mails as well.

A reminder email will be sent to the customer shortly before the subscription is due.

3.3.4 Checkout Options

Among other things, you can define whether you allow for guest orders and if you would like to give the customer an overview over the conditions and general terms before checkout.

3.3.5 Cart Settings

Innovatively, you can subscribe to complete carts as well as to single products. To activate this function, enable **Cart Subscriptions**.

The **Subscription Plans** define the rhythms visible in the subscription. These plans will be shown in the customer's cart afterwards (cf. screenshot below)

Cart Subscriptions

Enable Cart Subscriptions [STORE VIEW]

Subscription Plans

Description	Billing period unit	Billing frequency	Maximum billing cycles	Order	
Every Month	Month	1			
Every 2 Weeks	Week	2			
Every 5 weeks	Week	5			
<div> <div> -- Please select -- </div> <div> Add </div> </div>					

Describe the subscription plan. This description is then shown on the cart page in the subscription plan drop-down.
 Billing unit during the subscription period.
 Number of billing periods that make up one billing cycle.
 The subscriptions ends automatically after the above entered number of billing cycles.
 Define the order of the plans in the drop-down.

Minimum order total

Maximum order total

Product Filter

Page 1 of 1 pages | View 20 per page | Total 2 records found [Reset Filter](#) [Search](#) [STORE VIEW]

<input type="checkbox"/>	ID	SKU	Product name
<input type="checkbox"/>	Any		
<input type="checkbox"/>	1	simple-sub	Simple Product
<input type="checkbox"/>	4	conf-sub	Configurable Product (every month)

Select the products that cannot be used in subscriptions.

Figure 3.1: Subscription checkout settings

Shopping Cart [Proceed to Checkout](#)

✓ Simple Product was added to your shopping cart.

	Product name		Unit Price	Qty	Subtotal	
	Simple Product	Edit	€23.00	<input type="text" value="1"/>	€23.00	

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

SUBSCRIPTION

Start Date

Select a subscription plan:

Every Month

Billing period

1 Month cycle

Maximum billing cycles

Repeats before cancelled.

[Apply subscription to cart](#)

Subtotal €23.00

Grand Total €23.00

[Proceed to Checkout](#)

[Checkout with Multiple Addresses](#)

Figure 3.1: Subscription Checkout in the frontend

In addition, you can exclude certain products from the order with the **product filter**. Further information on the testing can be found [here](#).

4 Subscription Products

You can easily transform new or existing products into subscription products by switching to the tab **Subscription** after opening the product configuration.

Here you can customize your settings:

- **Sign-Up Fee:** Define a discount or a fee for the initial order.
- **Plan:** This allows you to set the delivery rhythms. You can also define the cancellation period for the product with the option **deadline**. Once the customer has cancelled the subscription, his card will no longer be charged once the deadline is reached.
- **Delivery:** Choose between original and fixed delivery costs.

Subscription	
Enable Subscription	Yes
Subscription	
Initial Fee/Discount	
Initial Fee/Discount	<input type="text"/> <small>Define a fee or a discount (negative value) that is added to or subtracted from the initial payment.</small>
Schedule	
Description *	Monthly Subscriptions <small>Describe the subscription and schedule. The value of this field is used for configurable product options.</small>
Billing Period Unit *	Month <small>Unit for billing during the subscription period.</small>
Billing Frequency *	1 <small>Number of billing periods that make up one billing cycle.</small>
Maximum Billing Cycles	<input type="text"/> <small>The subscriptions ends automatically after the above entered number of billing cycles.</small>
Period Of Notice	<input type="text"/> <small>The number of billing cycles the subscription will keep running after the cancelation is requested.</small>
Shipping	
Shipping Amount Type	Equals initial order <small>Whether to use a fixed shipping amount or calculate it dynamically.</small>

Figure 4.1: Subscription Maintenance

5 Subscription Maintenance

5.1 Operation Mode

When reaching the due date, the module automatically creates a new order. The customer's credit card will be charged by default. Should the payment fail (e.g. due to an expired credit card), an order will be created and assigned the status **pending**. The customer receives a reminder and can update the payment information by the deadline. If the customer misses the deadline, the subscription is cancelled.

5.2 Maintaining / Suspending a Subscription

In **Sales > Subscriptions** all active and suspended subscriptions can be accessed. You can open each subscription and view the corresponding orders.

The Subscription Maintenance gives you the following options:

1. **Cancel:** The subscription will be cancelled and will not be accounted for after the expiration of the period of notice.
2. **Suspend:** The subscription is suspended and will be paused until it is reactivated.

Subscription # 100000038 | 30/11/2013 5:42:38 AM Back Cancel Suspend

Subscription Payment Method: Credit Card Reference Id: 100000038 Description: Monthly Subscriptions Status: Active		Schedule Information Start Date: 20/12/2013 Billing Period: 1 Month cycle Maximum Billing Cycles: Repeats until canceled.																	
Billing Address casdadad sadasda asdasdas asdasd asdasd, Alaska, a23 United States T: sffadsdf		Shipping Address casdadad sadasda asdasdas asdasd asdasd, Alaska, a23 United States T: sffadsdf																	
Billing Information Last Billed: 30/11/2013 Next Cycle: 30/12/2013 Payments Made: 1		Payments Currency: EUR Billing Amount: €15.00 Shipping Amount: €5.00 Total Recurring Amount: €20.00																	
Purchased Items <table border="1"> <thead> <tr> <th>Product</th> <th>Price</th> <th>Qty</th> <th>Subtotal</th> <th>Tax Amount</th> <th>Discount Amount</th> <th>Row Total</th> <th>In Stock</th> </tr> </thead> <tbody> <tr> <td>Magazine - Monthly Subscription SKU: wired-monthly</td> <td>€15.00</td> <td>1</td> <td>€15.00</td> <td>€0.00</td> <td>€0.00</td> <td>€15.00</td> <td>Yes</td> </tr> </tbody> </table>				Product	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total	In Stock	Magazine - Monthly Subscription SKU: wired-monthly	€15.00	1	€15.00	€0.00	€0.00	€15.00	Yes
Product	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total	In Stock												
Magazine - Monthly Subscription SKU: wired-monthly	€15.00	1	€15.00	€0.00	€0.00	€15.00	Yes												

Figure 5.1: Suspending or canceling subscriptions.

The customer can cancel or suspend subscriptions through the customer account. If these options are not available, make sure to activate the respective part in the template.

Abo # 100000005

[Kündigen](#)

Über dieses Abo: [Abo-Informationen](#) [Verbundene Bestellungen](#)

Abo		Plan Informationen	
Zahlungsmethode	MasterCard	Anfangsdatum	06.02.2015 09:04:43
Referenz ID	100000005	Rechnungsperiode	10 Minute Zyklus
Beschreibung	10min	Maximale Rechnungszyklen	Wiederholungen bis Kündigung.
Status	Aktiv	First	Wiederholt sich 2 Mal(e) nach der Kündigungs-Anfrage.

Rechnungsinformationen		Zahlungen	
Zuletzt in Rechnung gestellt	05.02.2015 16:15:56	Währung	CHF
Nächster Zyklus	06.02.2015 09:05:56	Ursprünglicher Rabatt	-10,00 CHF
Ausgeführte Zahlungen	4	Rechnungsbetrag	55,00 CHF
		Lieferbetrag	15,00 CHF
		Totaler wiederkehrender Betrag	70,00 CHF

Gekaufter Artikel

Produktname	SKU	Preis	Anzahl	Zwischensumme
Blue Horizons Bracelets	acj0006s	55,00 CHF	Ordered: 1	55,00 CHF

[« Zurück zu den Abos](#)

Figure 5.1: Customer perspective: Suspending or cancelling a subscription.

6 Payment Integrations

6.1 Magento Payment Module from sellXed

This module is compatible with all of sellXed's payment plugins for Magento. A list of all possible integrations can be found [in the sellXed Shop](#).

Please note that the respective options have to be available and activated through the Payment Service Provider in order to integrate and process subscriptions. Regarding credit card payments, the option Alias / Token Manager has to be activated in order for the customer's credit card alias to be charged.

6.2 PayPal Exception

The sellXed [PayPal Module](#) also allows you to process subscriptions via PayPal. In this case you have to activate the option 'Billing Agreements' in your PayPal account. In order to do this, please contact PayPal directly.

7 Migration from Subscription 1.x to 2.x

The subscription module has been completely revised to create version 2.X incorporating feedback from our customers. Especially the Cron Job settings have been changed.

7.1 What's New?

If you already own version 1.x of the module you will notice several changes in the new version.

- Dunning levels do not exist in the new version. You can define a payment deadline by which the invoice has to be captured. Another new feature is that the customer now receives a reminder email.
- You can notify the customer by email shortly before a new subscription order is triggered. Here you can define several levels.
- The orders are now captured directly according to the payment module settings or they can only be authorised.
- There is no Test Cron anymore. The testing now takes place through test items and a correspondingly short subscription cycle (now defined in minutes).

7.2 Migration

The following steps have to be followed during the migration:

1. Create a backup of your database
2. Load the module onto the server
3. Empty the cache. At this point, all existing subscriptions will be migrated. Please note: depending on the number of subscriptions, this step can take a while. Please do not interrupt the process. If the migration fails, you will be notified by Magento in the backend. Then you can initiate the migration again.
4. Some configuration settings have been discarded and others have been added. Please review your configuration.

8 Test Mode

To test the subscriptions, create a test item with a subscription interval of 10 minutes and make sure to adjust the Cron settings in the shop to 1 minute. Now you can subscribe to an item or a shopping basket. After the interval has passed, a new order is triggered automatically. The new orders can be viewed in your shop as usual.

If a subscription fails due to erroneous configurations you can access it at Sales > Subscriptions. Further information on the cause for the failure is shown when you open the order.

If an error occurred during the cron process, the following message will be shown in the admin section: "One or more errors occurred when processing scheduled jobs." In this case, search for the error message in the customweb_subscription_schedule table.

8.1 Error analysis

If subscriptions fail on a regular basis, please check your configuration for the following possible causes:

- Did you activate the Token option with your PSP?
- Was the invoice for the previous order captured? Is it marked as pending? Otherwise check the capture settings in the payment module.
- If the orders are not triggered at all, please review your Cron settings.

9 Testing

Before switching from test to live mode it is important that you test the module extensively. You can find all relevant test credit card data under: <http://www.sellxed.com/de/testen>.

Testing

Do not forget to switch the operating mode from test to live after having successfully tested the module.

9.1 Test Data

In the following section you can find the test data for the various payment methods:

```
####callback('demoDataRenderer', 'render', 'de')####
```


10 Updates und Upgrades

You have direct and unlimited access to updates and upgrades during the duration of your support contract. In order to receive constant information about available updates we ask you to subscribe to our RSS feed that we publish for your module. More information regarding the subscription of this RSS feed can be found under: http://www.sellxed.com/en/updates_upgrades.

10.1 Update Checklist

We ask you to strictly comply with the checklist below when doing an update:

1. Always do a back up for your database and your files in your shop
2. Use always a test system to test the update process. We test our modules. However, there is always a chance that the update fails due to unforeseeable incompatibilities with 3rd party plugins.
3. Wait until all the files are copied to the shop, clear the cache if there is one in your shop and then visit the configuration page of the main module so that the update process will be initialized.

Do not do updates directly in the live environment

Please test the update procedure first in your test shop. Our support team is able and willing to help you if you experience problems with the update process. However, if you decide to perform the update directly in your live shop there is the possibility of a downtime of the shop of more than two days depending on the availability of our support if you do not want to book our [complementary support](#).

Depending on the version it could be that the database has to be migrated. We recommend you therefore, to perform the updates in times when the shop is not visited to frequently by your customers

10.2 Update Instructions

Please always read the update instructions (as shown on the screenshot below). They can be found on the plugin page in the shop under the section change log on the lower end of the page. If there are no special remarks, you can proceed by just overwriting the files in your system

Changelog

Version 1.2.108 - BUGFIX

Wed, 16 Jul 2014 09:45:09 +0200

Optimize the transaction data in the database to use less space.

Version 1.2.107 - BUGFIX

Tue, 15 Jul 2014 14:10:19 +0200

- Handling of database transactions improved.
- Refactoring of interfaces
- Make sure that capturing and refunding can be done per line item.

Update instructions

No reinstallation required

1. Backup files and database.
2. Upload files and overwrite existing files.
3. Make sure that the database migration is executed.

If you are unsure, please contact us for more information about the migration.

Version 1.2.106 - BUGFIX

Wed, 25 Jun 2014 08:25:03 +0200

Set the order status during order initialization.

Figure 10.1: Changelog update instructions.

11 Popular Problems

11.1 The automatic charge is not activated

In order for the payment of recurring orders to be successful, an alias has to be created with the Payment Service Provider upon the initial order. This alias has to be reported back to the shop. Make sure the option **Alias Manager** is activated in the payment module as well as in your contract. Additionally, monitor whether the parameters are reported back to your shop correspondingly.

12 Errors and their Solutions

You can find detailed information under <http://www.sellxed.com/en/fag>. Should you not be able to solve your problem with the provided information, please contact us directly under: <http://www.sellxed.com/en/support>

12.1 The Referrer URL appears in my Analytics Tool

When a customer and the notification are redirected via Header Redirection, the ____paymentServiceProviderName____ Referrer URL might appear in your Analytics Tool thus hiding the original traffic source. However, most Analytic Tools are able to minimize this problem.

In case you are using Google Analytics as reporting tool, this step by step guide may help you to exclude the URLs: [under bullet point 4](#).