



Version 20.1.0



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1. Summary

The sticky.io SFCC Cartridge grants the Merchant the ability to sell subscription services and products on their site. Products can be configured with various Billing Models (subscription frequencies) and are automatically synced to sticky.io. Re-billing of customers takes place automatically in sticky.io and new “re-bill” orders are pushed in real-time to SFCC. Customers that have created a Merchant account can self-manage their subscriptions from the My Account section of the Merchant storefront.

Customer Service Representatives have access to an in-depth sticky.io Subscription Management dashboard and the ability to configure custom Offers and Billing Models within Business Manager.

Integration encompasses deployment of a Cartridge to both the Merchant Site and Business Manager, which will enable a Business Manager extension. Modification of storefront code is not necessary as this Cartridge follows SFRA best practices, but changes to existing templates and Controllers are outlined in the appropriate sections.

New Business Manager modules fall both under the new “sticky.io” menu (sticky.io Custom Offer / Billing Model Configuration, Custom Subscription Product Configuration, Site Shortcut to Custom Preferences) and under the existing “Orders” menu (sticky.io Order Management Dashboard).

The sticky.io SFCC Cartridge is only compatible with SFRA and built against version 4.4.1.

The sticky.io SFCC Cartridge contains both a Storefront integration and a separate (included) Business Manager Extension Cartridge. Instructions to install both are included in this documentation.

In order to use the Cartridge, customers must be in contract with sticky.io.

2. Component Overview

Functional Overview

- Deeply integrated, extending the product and productLineItem models (not a widget)
- Front-end template changes are minor
- No feeds, APIs only
- Custom Object used as a “cache” for Campaign/Offer/Billing Model data to mitigate storefront API requests
- OCAPI use for order re-bills and subscription offer syncing
- Merchant Custom Preference center, custom product configurator, direct sticky.io order management
- Native order object contains sticky.io attributes for easy reference
- Pre-built most-common subscription offers and billing models integrated to native SFCC product config
- Tracking Number for shipments sync between systems, if available and enabled
- Allows for guest checkout (Merchant controllable)
- Consumer self-management of subscriptions possible with Merchant storefront account
- Allows for combination of non-subscription items and subscription items in the same cart
- Supports all native SFCC product types (bundles are coming soon)
- Supports all native product views (PDP, quick view, cart edit)
- Natively supports all Campaign & Promotion possibilities (Subscribe & Save example included)
- Subscription information Integrated across mini-cart and productCard
- Validation on product view - prevents misconfiguration or out-of-sync changes

Use Cases

Use Case Scenario	Result
Consumer wants to purchase a subscription service to a physical or digital product (Product, Variation, Product Set).	Consumer adds product to cart after selecting appropriate Subscription Period, if applicable.
Consumer wants to add multiple subscription products to their cart.	Consumer adds additional subscription products to cart after selecting Subscription Period, if applicable.
Consumer wants to add non-subscription products to the cart.	Normal functionality.
Consumer wants to purchase a subscription product without a subscription.	If product is configured to allow this, Consumer may pick the “One-time Purchase, No Subscription” aka “Straight Sale” option for a product.
Registered Consumer wants to self-manage their subscription post-purchase.	Registered Consumer visits the “My Account” page to find their subscription order and self-manage.
Unregistered/Guest Consumer wants to self-manage or change something about their subscription post-purchase.	Consumer must contact a Customer Service Representative.

Out-of-the-box support and code is provided for basic auth Credit Card processing with all payment processors. Apple Pay, PayPal, and Square are supported by sticky.io, but code is not included in this Cartridge.

Limitations, Constraints

- Orders with more than one shipping address are not currently supported by the Cartridge.
- Orders with multiple payment methods are not currently supported by the Cartridge.
- sticky.io product bundling is not yet supported

Compatibility

Available since Commerce Cloud 20.1 (Compatibility mode 18.10+)

Built and tested against SFRA 4.4.1

OCAPI >= 19.10

This Cartridge is **not** compatible with Site Genesis Controllers or legacy Pipelines.

Locales

en_us is supported and included by default. Localization parameters are available for customization and as a guide to create new localizations at *int_stickyio_sfra/cartridge/templates/resources/stickyio.properties*

Privacy, Payment

Customer Profile data including name, address, phone number, and email will be stored for re-bill order fulfillment with sticky.io. Payment information is stored in a “tokenized” and secure method. sticky.io is PCI-1 and GDPR compliant.

In using the sticky.io SFCC Cartridge, you agree to be bound by the sticky.io Terms of Service.

3. Implementation Guide

Prerequisites

- Implementor will need access to the Cartridge repository to clone, build, and upload the Cartridge to the appropriate SFCC instance. Instructions for these actions can be found in the README.md file in the root of the Cartridge repository.
- Implementor will need access to the Commerce Cloud Account Center in order to set up an OCAP user and an Business Manager user if using SFCC Unified Authentication.
- Implementor will need Administrative access to the Business Manager import Site data, manage Sites, and create a new Business Manager user if **not** using SFCC Unified Authentication.

A sticky.io representative must enable an account for the Merchant, as part of which the Merchant will be assigned a “Platform Key” and an “Instance Domain”. These two pieces of information will be added to a Custom Preference in a later step and are required before the Cartridge can be effectively used.

Cartridge Installation

Add the storefront Cartridge to the site by navigating to the following path: *Administration > Sites > Manage Sites > YOUR SITE > Settings*

Add the Cartridge name (*int_stickyio_sfra*) to the Cartridges path as shown in screenshot below:

[Administration](#) > [Sites](#) > [Manage Sites](#) > RefArch - Settings

General **Settings** Cache Site Status Page Meta Tag Rules

RefArch - Settings

Click **Apply** to save the details. Click **Reset** to revert to the last saved state.

Instance Type:	Sandbox/Development
<small>Deprecated. The preferred way of configuring HTTP and HTTPS hostnames is by using new features of the site aliases configuration ("SEO > Aliases Configuration"). The HTTP/HTTPS hostname values set in this section will be used if no hostnames are defined by aliases configuration and are intended only to support an older configuration style.</small>	
HTTP Hostname:	
HTTPS Hostname:	
Instance Type: All	
Cartridges:	int_stickyio_sfra:app_storefront_base
Effective Cartridge Path:	int_stickyio_sfra:app_storefront_base;plugin_apple_pay;plugin_facebook;plugin_pinterest_commerce;plugin_web_payments;bc_content:core
Apply Reset	

Add the Business Manager Extension Cartridge to the Business Manager to enable the sticky.io Business Manager extension and custom job steps by navigating to the following path: *Administration > Sites > Manage Sites > Business Manager > Settings*

Add the Cartridge name (*bm_stickyio*) to the Cartridges path as shown in screenshot below:

Business Manager - Settings

Click Apply to save the details. Click Reset to revert to the last saved state.

Instance Type: Sandbox/Development

Deprecated. Up to two instance specific hostname aliases for Business Manager can be configured here.

HTTP Hostname:

HTTPS Hostname:

Instance Type: All

Cartridges: bm_stickyio:bm_app_storefront_base

Effective Cartridge Path: app_business_manager;plugin_apple_pay;plugin_facebook;plugin_pinterest_commerce;plugin_web_payments;bc_impex;bc_search;bc_analytics;bc_transaction;bc_catalog;bc_content;

Metadata Import

sticky.io makes use of a custom Payment Method and Processor to process re-bill orders on behalf of the customer, using their original payment method. These orders are fully processed in the sticky.io system and passed along, via OCAPI, to the SFCC instance.

Site-specific metadata for the sticky.io Payment Method and Payment Processor provided, but action must first be taken prior to import:

1. Open the *site_import/sites/* folder from sticky.io's Cartridge *metadata* folder.
2. Rename the *yourSiteID* folder to the ID of your site in the Business Manager.
3. Zip the *site_import* folder.

Import sticky.io Metadata, Services, Job Schedules, Campaign & Promotion example, Payment Method and Payment Processor:

1. Get the *site-import.zip* file from the location where it was created in step 3 above.
2. Navigate to *Administration > Site Development > Site Import & Export*
3. Select the *site-import.zip* file and click on "Import" and complete the import process through the interface

The Jobs, Services, Site Preferences, Site Data, Global Data, and Custom Objects will be imported.

Jobs

The details regarding job schedules, services, and sticky.io Custom Preferences are described below.

Job Details	
Name	Description
sticky.io Campaign Sync	Pulls latest Campaign/Offer/Billing Model information from sticky.io. DO NOT CHANGE THIS JOB'S NAME. sticky.io calls this job via OCAPI when changes are made to an Offer or Billing Model in sticky.io.
sticky.io sticky.io -> SFCC Order Update	If sticky.io is fed tracking numbers for orders, this job will retrieve those tracking numbers and update the local SFCC order.
sticky.io SFCC -> sticky.io Order Update	If SFCC is fed tracking numbers for sticky.io orders, this job will push those tracking numbers to sticky.io.
sticky.io Product Sync	If there are frequent changes to the product catalog's subscription products, this job should be scheduled at a frequency appropriate to the amount of changes.

	Otherwise, it is necessary to run this job manually after subscription product changes have been made in the SFCC product config.
sticky.io Shipping Methods Update	Sync the SFCC shipping methods with sticky.io - This job should be run on first install and manually anytime shipping method updates are made in SFCC

Basic configurations for these jobs are included in the site import. However, the correct Sites must be configured. This configuration is located under the “Scope” section inside of the “Job Steps” tab. There are additional job parameters available within each Job Step, including sending of email logs (to be used primarily as developer diagnostics) and the “wiping” or “resetting” of preferences stored by SFCC.

Services

After successfully importing services, the following will be added and are viewable at: *Administration > Services*

Service Details	
Name	Profile
stickyio.http.delete.products.variants	stickyio.http.delete.v2
stickyio.http.get.analytics.dashboards	stickyio.http.get.v2
stickyio.http.get.billing_models	stickyio.http.get.v2
stickyio.http.get.campaigns	stickyio.http.get.v2
stickyio.http.get.custom_fields	stickyio.http.get.v2
stickyio.http.get.offers	stickyio.http.get.v2
stickyio.http.get.products.attributes	stickyio.http.get.v2
stickyio.http.get.products.variants	stickyio.http.get.v2
stickyio.http.get.shipping	stickyio.http.get.v2
stickyio.http.get.subscriptions.billing_models	stickyio.http.get.v2
stickyio.http.post.authorize_payment	stickyio.http.post.v1
stickyio.http.post.custom_fields	stickyio.http.post.v2
stickyio.http.post.new_order	stickyio.http.post.v1
stickyio.http.post.order_total.calculate	stickyio.http.post.v2
stickyio.http.post.order_update	stickyio.http.post.v1
stickyio.http.post.order_view	stickyio.http.post.v1
stickyio.http.post.product_create	stickyio.http.post.v1
stickyio.http.post.product_index	stickyio.http.post.v1
stickyio.http.post.product_update	stickyio.http.post.v1
stickyio.http.post.products.attributes	stickyio.http.post.v2
stickyio.http.post.products.custom_fields	stickyio.http.post.v2
stickyio.http.post.shipping	stickyio.http.post.v2
stickyio.http.post.sso.login	stickyio.http.post.v2

stickyio.http.post.subscriptions.bill_now	stickyio.http.post.v2
stickyio.http.post.subscriptions.reset	stickyio.http.post.v2
stickyio.http.post.subscriptions.start	stickyio.http.post.v2
stickyio.http.post.subscriptions.stop	stickyio.http.post.v2
stickyio.http.post.tokenize_payment	stickyio.http.post.v2
stickyio.http.put.campaigns	stickyio.http.put.v2
stickyio.http.put.offers	stickyio.http.put.v2
stickyio.http.put.products.variants	stickyio.http.put.v2
stickyio.http.put.shipping	stickyio.http.put.v2
stickyio.http.put.subscriptions.billing_model	stickyio.http.put.v2
stickyio.http.put.subscriptions.pause	stickyio.http.put.v2
stickyio.http.put.subscriptions.recur_at	stickyio.http.put.v2
stickyio.http.put.subscriptions.terminate_next	stickyio.http.put.v2

Service Credentials are pre-configured in the Site Import, and require a User and Password, which will be provided by sticky.io

[Administration](#) > [Operations](#) > [Services](#) > [Service Credentials](#) > sticky.io - Details

sticky.io

Fields with a red asterisk (*) are mandatory. Click **Apply** to save the details. Click **Reset** to revert to the last saved state.

These credentials are used by 35 services.

Name: *	<input type="text" value="sticky.io"/>
URL:	<input type="text" value="https://{HOST}/api/{V}/{ENDPOINT}"/>
User:	<input type="text"/>
Password:	<input type="password"/>

Custom Preferences

Custom Preferences can be accessed in one of two ways in Business Manager:

Merchant Tools > Site Preferences > Custom Preferences > STICKYIO

Merchant Tools > sticky.io > Preferences

Custom Preferences should be configured on a per-site basis, meaning PIG and SIG instances can have different settings..

Custom Preferences	
Name	Description
Enable sticky.io	Enable or disable sticky.io storefront and gateway functionality
Platform Key	Provided by sticky.io
Instance Domain	Provided by sticky.io
Gateway ID	Provided by sticky.io
Kount Merchant ID	Provided by sticky.io

Straight-Sale Billing Model Name	The default, when blank, is "Straight Sale," and comes directly from sticky.io, but maybe you'd like something more consumer-friendly?
Force Registered Checkout	Require customers to log in before being able to check out with subscription items. Self-management is not possible without a storefront merchant account.
Allow Recurring Date Management	Consumer subscription self-management: Allow the consumer to manage the recurring date of their subscription.
Allow Billing Model Update	Consumer subscription self-management: Allow the consumer to change the billing model of their subscription.
Allow Pause	Consumer subscription self-management: Allow the consumer to pause their subscription.
Allow Stop	Consumer subscription self-management: Allow the consumer to stop their subscription - usually not a consumer-facing function.
Allow Terminate Next	Consumer subscription self-management: Allow the consumer to stop their subscription after the next rebill.
Allow Resume/Un-pause	Consumer subscription self-management: Allow the consumer to resume/un-pause a stopped subscription.
Allow Reset	Consumer subscription self-management: Allow the consumer to reset their subscription.
Allow Bill Now	Consumer subscription self-management: Allow the consumer to be billed "now" for their subscription.

Configuration

Custom Site Preferences' defaults should be sufficient for normal storefront operations. **Platform Key and Instance Domain are required before sticky.io can be operational and will be provided to you by your sticky.io representative.**

Services do not need to be configured beyond the Site Import. If logging for services is enabled within Business Manager, PII will be filtered from the logs.

Jobs should be configured as needed and described in the above table.

Please run the "sticky.io Shipping Methods Update" job at least once before enabling storefront functionality. The "sticky.io Product Sync" job must be run at least once before storefront functionality is operational and any subscription products are sellable.

A new user with first name "sticky.io" and last name "Subscription Services" must be created in either Business Manager or in the Commerce Cloud Account Center if using SFCC Unified Authentication.

If using SFCC Unified Authentication:

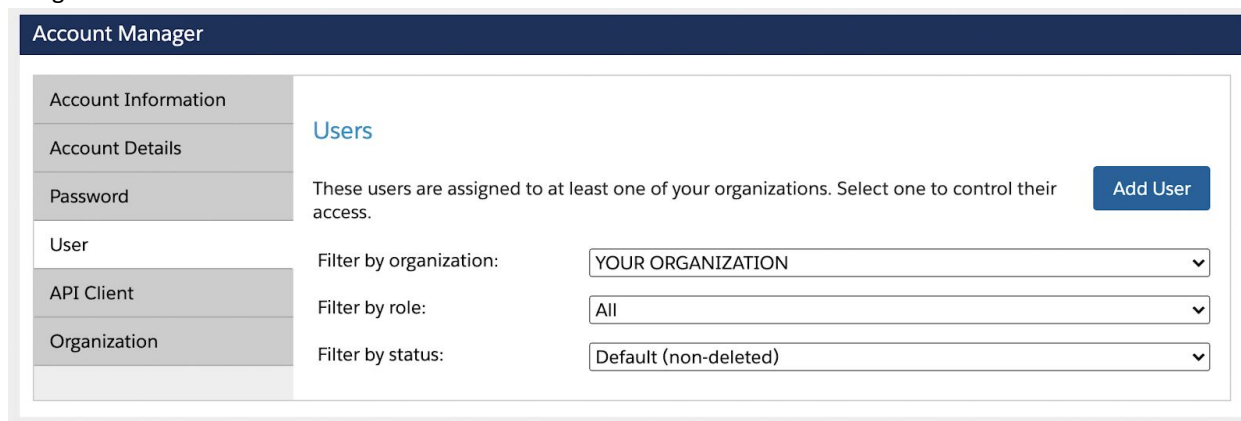
The login should be set to "sticky.io". **This user should be given Business Manager Administrator permissions for all necessary instances.** This is a required user account to enable OCAPI Business Manager access. Please set the email address of this user to *product@sticky.io*.

If **not** using SFCC Unified Authentication:

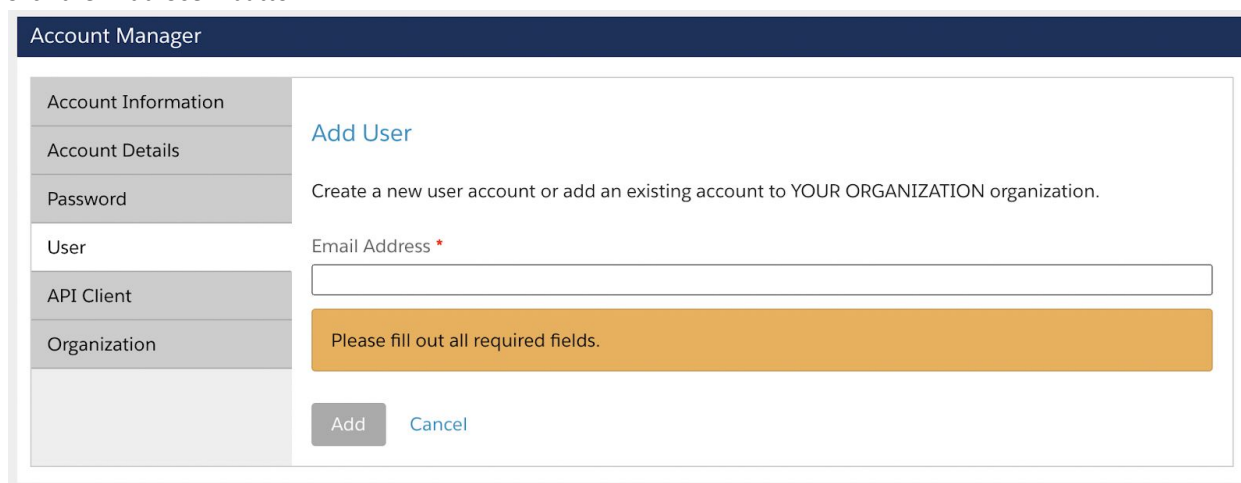
The login should be set to “sticky.io”. **This user should be given Administrative rights and allowed write permissions to all Site components for which sticky.io is active.** This is a required user account to enable OCAPI Business Manager access. Please set the email address of this user to *product@sticky.io* and allow the user to set the password.

Access the Commerce Cloud Account Manager at: <https://account.demandware.com/>

Navigate to User:

The screenshot shows the 'Account Manager' interface with a sidebar on the left containing links for 'Account Information', 'Account Details', 'Password', 'User', 'API Client', and 'Organization'. The main content area is titled 'Users' and includes a description: 'These users are assigned to at least one of your organizations. Select one to control their access.' There are three filter dropdowns: 'Filter by organization' (set to 'YOUR ORGANIZATION'), 'Filter by role' (set to 'All'), and 'Filter by status' (set to 'Default (non-deleted)'). An 'Add User' button is located in the top right corner.

Click the “Add User” button.

The screenshot shows the 'Account Manager' interface with the 'Add User' section active. The sidebar is the same as the previous screenshot. The main content area is titled 'Add User' and includes the instruction: 'Create a new user account or add an existing account to YOUR ORGANIZATION organization.' There is a text input field for 'Email Address *'. Below the field is an orange error message box that says 'Please fill out all required fields.' At the bottom, there are 'Add' and 'Cancel' buttons.

Please enter “product@sticky.io” as the email address.

Under the “Roles” selection that will appear, please select the following roles and make sure to grant instance access to any instance that will be utilizing sticky.io:

- Business Manager Administrator
- Business Manager User
- Log Center User
- Order Management Administrator
- Order Management User

Business Manager Administrator - Filters

YOUR ORGANIZATION

Enter Name...

YOUR.ORGANIZATION.DOMAIN

☐

P

production

☐

S

staging

☐

D

development

☐

*

All Sandboxes

Cancel

Add

sticky.io makes use of an OCAPI Business Manager Administrator or SFCC Unified Authentication user to place re-bill orders, sticky.io Campaign data in sync, and manage other aspects of subscription services on the Merchant's behalf.

OCAPI Configuration

Access the Commerce Cloud Account Manager at: <https://account.demandware.com/>
Navigate to API Client:

API Client ID ▲▼	Display Name ▲▼	Enabled ▲▼
dccf4d37-355e-4c32-bbdc-0b9d41ddc10e	sticky.io	true

Click the “Add API Client” button.

Enter a Display Name of “sticky.io”.

Choose a strong password, and write it down. You will need to provide this password to your sticky.io representative.

Select the appropriate Organization to which the Site you will enable sticky.io on belongs.

Change the “Token Endpoint Auth Method” to “client_secret_basic”.

Hit “Save”.

Change the “Access Token Format” to “UUID” and hit “Save” again.

Leave all other options their default.

Provide the generated API Client ID and password you created to your sticky.io representative.

In Business Manager, navigate to *Administration > Site Development > Open Commerce API Settings*

Open Commerce API Settings

This page allows you to make client application-specific configurations of Open Commerce API resources, i.e. manage resource access privileges, attribute read/write permissions, or configure client application-specific response headers. You can select the actual type of the API that you want to configure and specify whether your settings are site-specific or global (organization-wide). Please note that due to caching, changes may take up to three minutes to become effective. You can browse the Open Commerce API here [API Explorer](#).

```
{
  "v": "19.10",
  "clients": [
    {
      "client_id": "dccf4d37-355e-4c32-bbdc-0b9d41ddc10e",
      "allowed_origins": [],
      "resources": [
        {
          "resource_id": "/baskets",
          "methods": ["post"],
          "read_attributes": ["*"]
        }
      ]
    }
  ]
}
```

Set “Select Type” to “Shop” and “Select Context” to “Global (organization-wide)”.

Open the shopOCAPI.json file located in the *metadata/OCAPI* folder provided with the Cartridge with a decent text-editor (not Word), and copy and paste the XML into the text field of the OCAPI screen. Change the “client_id” to the API Client ID you created in Account Manager the previous step.

Hit “Save” located in the bottom right of the screen.

Shop OCAPI configuration allows sticky.io to place re-bill orders directly in SFCC.

Switch “Select Type” to “Data”.

Open the dataOCAPI.json file located in the *metadata/OCAPI* folder provided with the Cartridge with a decent text-editor (not Word), and copy and paste the XML into the text field of the OCAPI screen. Change the “client_id” to the API Client ID you created in Account Manager the previous step.

Hit “Save” located in the bottom right of the screen.

Data OCAPI configuration allows sticky.io to self-manage their Business Manager account (to abide by password change policies) and execute the **sticky.io Campaign Sync Job** whenever an Offer or Billing Model is changed in the sticky.io system.

A Postman collection is provided at *int_stickyio_sfra/documentation/sticky.io.postman_collection.json* that contains all in-use OCAPI requests and example responses. This is provided for LINK certification purposes only and is not relevant to a client implementation.

Template Overrides

Several SFRA templates are overridden as a part of the Cartridge:

```
int_stickyio_sfra/cartridge/templates/default/account/orderDetails.isml
int_stickyio_sfra/cartridge/templates/default/cart/productCard/cartProductCard.isml
int_stickyio_sfra/cartridge/templates/default/cart/cart.isml
int_stickyio_sfra/cartridge/templates/default/checkout/checkout.isml
int_stickyio_sfra/cartridge/templates/default/checkout/billing/paymentOptions/creditCardContent.isml
int_stickyio_sfra/cartridge/templates/default/checkout/confirmation/confirmation.isml
int_stickyio_sfra/cartridge/templates/default/checkout/confirmation/confirmationEmail.isml
int_stickyio_sfra/cartridge/templates/default/checkout/productCard/productCard.isml
int_stickyio_sfra/cartridge/templates/default/checkout/shipping/shipping.isml
int_stickyio_sfra/cartridge/templates/default/checkout/checkoutLogin.isml
int_stickyio_sfra/cartridge/templates/default/product/components/setItems.isml
int_stickyio_sfra/cartridge/templates/default/product/productDetails.isml
int_stickyio_sfra/cartridge/templates/default/product/setDetails.isml
int_stickyio_sfra/cartridge/templates/default/product/quickView.isml
int_stickyio_sfra/cartridge/templates/default/search/searchResults.isml
```

If any of these templates are also overridden by another cartridge, you will have to merge the changes from that cartridge with the changes made in the sticky.io version of the template. The recommended approach is to create a separate cartridge which contains only the merged templates.

Custom Code

Re-bill orders pushed in to SFCC from sticky.io via OCAPI trigger Order Confirmation Emails. It is up to the Merchant to implement expected functionality in terms of the appropriate template or third-party service to handle creation/delivery of this email if the default is not desired. Hook functionality exists in the `cartridge/scripts/hooks/stickyioOCAPI/order.js` `afterPOST` method.

Open `int_stickyio_sfra/cartridge/templates/resources/stickyio.properties` and find the following items:

`msg.guest.checkout`

`msg.guest.checkoutthis`

`msg.noguest.checkout`

Change “Salesforce Commerce Cloud” to the name of your business or site.

External Interfaces

This Cartridge makes extensive use of the LocalService framework to make API calls to sticky.io over HTTPS. sticky.io leverages OCAPI functionality to push “re-bill” subscription orders in the SFCC system and add product-level attributes to drive cartridge functionality.

Firewall Requirements

Make sure your SFCC POD’s ports 80 and 443 can communicate with sticky.io’s servers.

Additionally, sticky.io can whitelist your POD’s outgoing IP to restrict access to the sticky.io system. Discuss with your implementation partner/sticky.io if this is right for you.

Payment Processors

Your sticky.io representative will work with you to set up a mirror of your SFCC payment processor on the sticky.io platform. sticky.io operates as a pass-through to your existing processor in order to capture payment details for subscription re-billing.

4. Operations, Maintenance

Data Storage

sticky.io takes advantage of SFCC’s Custom Objects to create a singular “cache” object, consisting of the JSON representation of the sticky.io Campaign object. Whenever a change is made to a subscription product (and the Product Sync job is called) or an Offer or Billing Model is modified in sticky.io, this campaign cache object is updated. The purpose of this object is to reduce storefront reliance on the sticky.io system for checking the validity of all subscription products at view and add-to-cart. No sensitive information is stored within this cache object and it will be recreated every time the Product or Campaign Sync job is run.

Several native system-object types are extended with custom attributes to facilitate the relationship between a SFCC Product and a sticky.io Product/Campaign/Offer/Billing Model. The native SFCC Order, Shipment, and Shipment Line Item system-objects are also extended to hold information about a customer’s sticky.io subscription, and these custom attributes are exposed in the appropriate sections of Order Management within Business Manager.

Availability

status.sticky.io

Uptime: 99.98%

System Response Time: 276 ms

Support Line: + 1 (800) 455-9645
Office Hours: 9am – 5pm EST Mon – Fri
Emergency after-hour support

**Storefront impact is negligible as subscription products will still be able to be added to a Cart should sticky.io become unresponsive. However, the final checkout step will fail when creating an order.*

Failover/Recovery Process

In the case of an extended service outage, orders containing subscription items will fail at the final checkout step.

Support

product@sticky.io

5. User Guide










Roles, Responsibilities

sticky.io supports a variety of user roles, but in this Cartridge implementation, only two are necessary:





CSR - to manage subscription orders on behalf of a customer via sticky.io

Merchant Admin - to set up custom Offers and Billing Models in sticky.io

The CSR role should be assigned to employees familiar with order management. The CSR role should be granted access to the new sticky.io Business Manager module located under *Merchant Site > Ordering > sticky.io Order Management*

 Ordering		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Orders	Manage the orders of this site. Please note that for read-only access across the entire "Orders" module the functional permission 'Delete_Order_Note' is required in the site context.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Taxation	Manage taxation settings of this site.		<input checked="" type="checkbox"/>
 Payment Processors	Manage the payment processors of this site.		<input checked="" type="checkbox"/>
 Payment Methods	Manage the payment methods of this site.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Shipping Methods	Manage the shipping methods of this site.		<input checked="" type="checkbox"/>
 Import & Export	Import and export ordering data of this site.		<input checked="" type="checkbox"/>
 Customer Service Center	Capture orders on behalf of a customer.		<input checked="" type="checkbox"/>
 sticky.io Order Management	sticky.io Order Management		<input checked="" type="checkbox"/>

The Merchant Admin role should be assigned to employees familiar with more in-depth ecommerce configuration options. This role should be granted access to everything under the new *Merchant Tools > sticky.io Business Manager extension*.

 sticky.io		<input checked="" type="checkbox"/>
 Custom Offer Configuration	Custom Offer Configuration	<input checked="" type="checkbox"/>
 Custom Product Configuration	Custom Product Configuration	<input checked="" type="checkbox"/>
 Preferences	Preferences	<input checked="" type="checkbox"/>

Existing Merchant roles that will be responsible for managing subscription products on the Merchant Site will also need access to these new sticky.io Business Manager extensions. **Additionally, existing Merchants roles will need access to the Jobs functionality within Business Manager if the sticky.io Product Sync Job is not scheduled at an appropriate interval to pick up any Merchant changes.**

Business Manager Modules

sticky.io Order Management (*Merchant Tools > Ordering > sticky.io Order Management*):

orders > sticky.io Order Management

Orders

Search Order History Hide

From: Tracking #: Customer ID: City: Affiliate ID:

To: Shipping: Gateway ID: ZIP: Sub-Affiliate ID:

Order ID: Shipped Status: First Name: Phone: Confirm Status:

Campaign ID: Payment Type: Last Name: State: RMA #:

Transaction ID: Status: Email: Country: Billing Cycle:

Product ID: CC First Six: Address: IP: Routing/Account#:

Upsell ID: CC Last Four: Address 2: Test Order: Gift Order:

Hold Type: SHOW RESULTS CLEAR

Promo Code:

Import Orders for: Tracking: Select File: BROWSE IMPORT FORCE SHIP

Orders Features: ORDER DETAILS START RECURRING STOP RECURRING RESET RECURRING BLACKLIST ORDERS EXPORT CSV DELETE ORDERS

1 2 3 10

sticky.io Custom Offer/Billing Model Configuration (*Merchant Tools > sticky.io > sticky.io Custom Offer Configuration*):

stickyio > Custom Offer Configuration

Home / Products / Offers

Offers

Active | Archived

Search... ACTIONS

ID	Name	Offer Type	Recurring Type	Has Trial?	Expires	Updated
2	Custom Test Offer	Standard	Self Recurring	No	No	01/15/2020
1	Subscriptions	Standard	Self Recurring	No	No	01/12/2020

Showing 1 to 2 of 2 rows.

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sticky.io Custom Product Configuration (*Merchant Tools > sticky.io > Custom Product Configuration*):

stickyio > Custom Product Configuration

sticky.io Offers & Billing Models last sync time: Fri Jan 24 01:44:43 GMT 2020

1 Custom Offers | Sync Offers & Billing Models

0 Custom Subscription Products

This module must be used to configure a subscription product that has a *custom* Offer, as described in the below section, "Setting up a Subscription Product with a Custom Offer".

Setting up a Subscription Product

The Cartridge comes out-of-the-box with an “Offer” (Subscriptions) and several “Billing Models” (Straight Sale [No Subscription], 30 Day Recurring, 60 Day Recurring, 90 Day Recurring, Annual Recurring, Weekly Recurring, and Monthly Recurring). These configurations cover a majority of use-cases and applying them to new or existing products within SFCC can be accomplished as follows:

Navigate to a product for which you’d like to have subscription services enabled. Stand-alone Products, Master Products, and Product Sets may have subscriptions enabled.

If a stand-alone Product or Master Product is part of a Product Set, that individual product’s subscription settings will override any Product Set subscription settings.

Similarly, if a product has no configured subscription settings, but is part of a subscribable Product Set, the product will inherit its Product Set’s settings on the next run of the **Product Sync Job**.

Scroll down the “General” attributes until you reach the new sticky.io attribute section.

The screenshot displays the Salesforce Commerce Cloud (SFCC) product edit interface. The top navigation bar includes the Salesforce logo, 'Sandbox - sticky.io', 'RefArch', and tabs for 'Merchant Tools', 'Administration', 'Storefront', and 'Toolkit'. The breadcrumb trail indicates the path: 'Merchant Tools > Products and Catalogs > Products > 25686364M - General'. The product title is 'Charcoal Single Pleat Striped Wool Suit <25686364M>'. A lock notification states: 'You've locked this variation master for editing. Click [Unlock](#) to release. The lock expires in 0 hour(s) 59 minute(s) 59 second(s). The respective variation products have been locked automatically for you.' Below this, a 'Select Language' dropdown is set to 'Default'. The product details section includes fields for ID (25686364M), Catalog (apparel-m-catalog), Tax Class (Standard), Searchable (Default), Searchable If Unavailable (Default), Name (Charcoal Single Pleat Striped Wool Suit), and Brand. At the bottom, the 'sticky.io' section is expanded, showing subscription settings: Subscription Product (Default), Offer (Default), Billing Models (Default), Billing Model Consumer Selectable (Default), and Product Vertical (-None-). The Billing Models dropdown is open, showing options: -None-, 2 (One-time Purchase), 3 (Monthly Subscription (Bills on same date every month)), 4 (Annual Subscription), and 5 (30 Day Recurring).

Choose the “Subscriptions” Offer, and any combination of Billing Models that suits your needs. Select multiple by holding down the Command or Control key.

sticky.io

Subscription Product: Default Yes

Offer: Default 1 (Subscriptions)

Billing Models: Default

Billing Model Consumer Selectable: Default Yes

Product Vertical: 5 (Clothing & Apparel)

Configure other options as desired and then hit the “Apply” button on the bottom-left.

If you haven’t enabled the **sticky.io Product Sync Job**, or you would like to be able to purchase this product immediately, before the next scheduled job run, navigate to *Administration > Jobs* and run the **sticky.io Product Sync Job**.

Sandbox - sticky.io RefArch

Merchant Tools Administration Storefront Toolkit

Administration / Operations /

Jobs

Search by IDs...

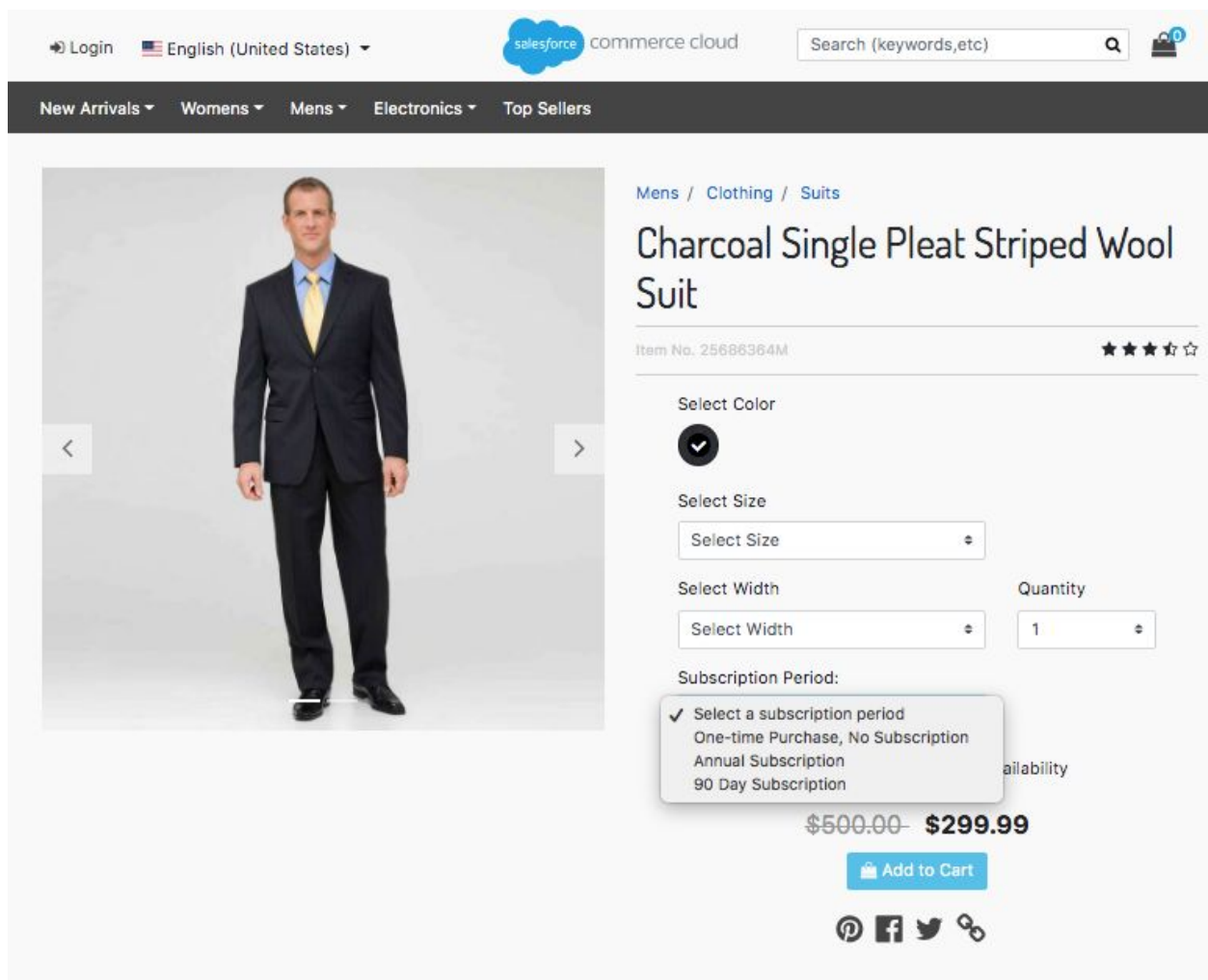
Enable Disable Run Delete Priority

Refresh

ID	Status	Last Run	Execution Scope	Resources	Priority	Enabled	Delete
RebuildURLs	-		2	-			
Reindex	-		2	-			
sticky.io Campaign Sync	-		RefArch	-			
<input checked="" type="checkbox"/> sticky.io Product Sync	-		RefArch	-			
sticky.io SFCC->sticky.io Order Update	-		RefArch	-			
sticky.io Shipping Methods Update	-		RefArch	-			
sticky.io sticky.io->SFCC Order Update	-		RefArch	-			

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Once the job is complete, you can view the item on the storefront (technically, you can view the item without running the job, but attempting to checkout with it will cause an error, as sticky.io may not yet be aware of its existence).



Setting up a Subscription Product with a Custom Offer

Should the built-in “Subscriptions” Offer or Billing Models not be sufficient for your needs, sticky.io has the best-in-class abilities to create a custom Offer for your product. To begin, select the “Custom” Offer from the Offers drop-down in your product’s attributes, and hit the “Apply” button on the bottom-left. Selecting “Custom” renders the native Billing Models multi-select on this page meaningless.

Navigate to your site’s *Merchant Tools > sticky.io > Custom Offer Configuration* menu to access the sticky.io Offer Config.

salesforce | Sandbox - sticky.io RefArch | Merchant Tools | Administration | Storefront | Toolkit | (Admin Admin)

sticky.io > Custom Offer Configuration

Home / Products / Offers

Offers

Active | Archived

Search... ACTIONS

ID	Name	Offer Type	Recurring Type	Has Trial?	Expires	Updated
2	Custom Test Offer	Standard	Self Recurring	No	No	01/15/2020
1	Subscriptions	Standard	Self Recurring	No	No	01/12/2020

Showing 1 to 2 of 2 rows.

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Create a new Offer inline with your needs. Your sticky.io representative can help walk you through the many options.

salesforce | Sandbox - sticky.io RefArch | Merchant Tools | Administration | Storefront | Toolkit | (Admin Admin)

sticky.io > Custom Offer Configuration

Home / Products / Offers / Add

Add Offer

ID N/A

Name

Billing Models

Selected Options: [DESELECT ALL](#)

No selected options

Add Options: [SELECT ALL](#)

Search or comma separated list of ids...

- ☐ (2) Straight Sale
- ☐ (3) Monthly Subscription (Bills on same date every month)
- ☐ (4) Annual Subscription
- ☐ (5) 30 Day Subscription
- ☐ (6) 60 Day Subscription

On save, the updated or newly created Offer will be pushed to SFCC via OCAPI.

Navigate to your site's *Merchant Tools > sticky.io > Custom Product Configuration* to associate the product you would like to use this Custom Offer with the Custom Offer.

Choose the product from the dropdown.

Configure the product as desired. Select multiple Billing Models, if available, by holding down the Command or Control key.

On save, the **sticky.io Product Sync Job** will run automatically and your product and its Custom Offer options should be viewable in the storefront.

Discounts will apply based on SFCC configuration. Discounts configured with the sticky.io Offer configuration will not apply. SFCC configuration is the truth of the record price and will override any discounts or prices configured in sticky.io custom offer configuration..

Business Manager Jobs

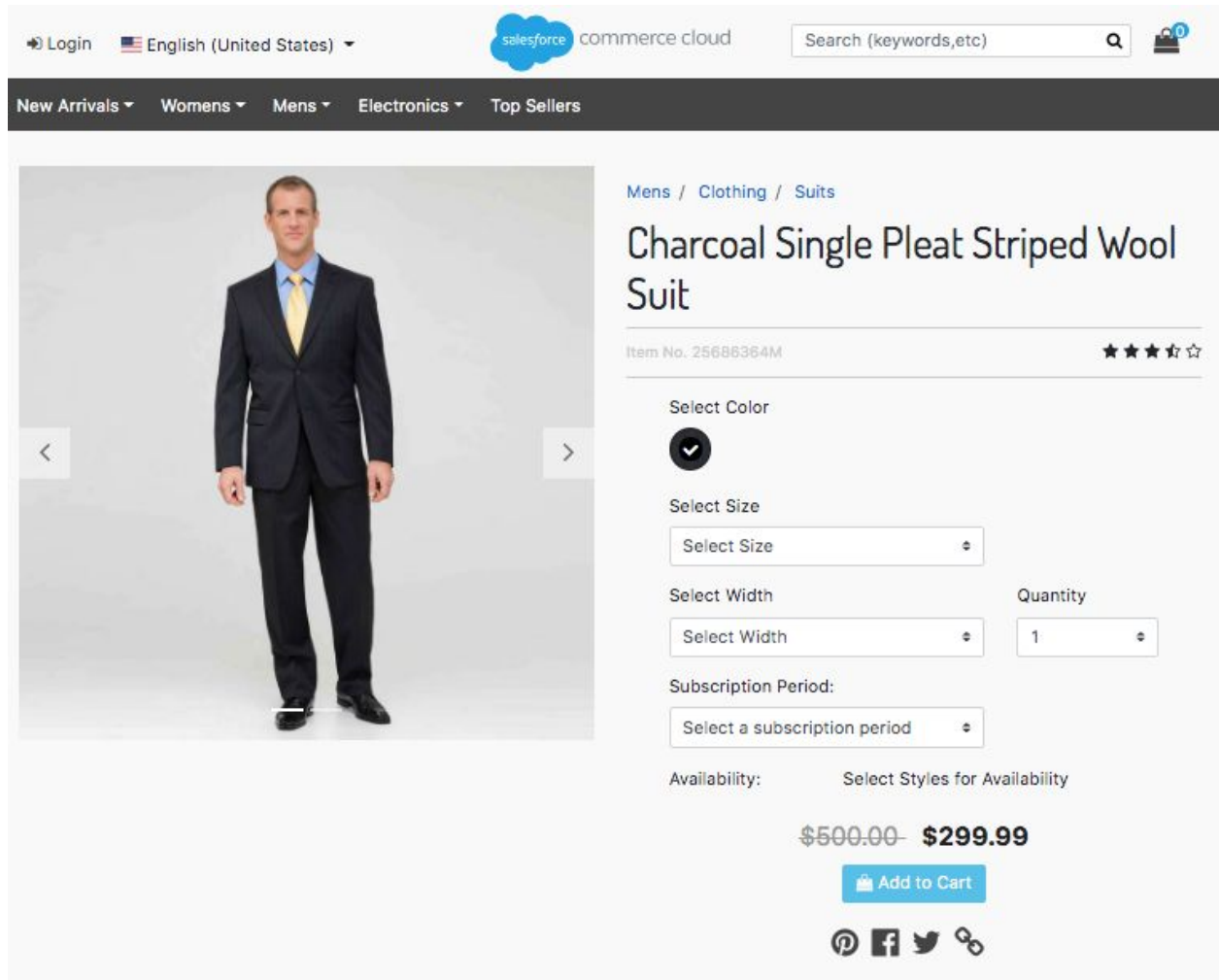
Enable the **sticky.io Product Sync** job to run on a recurring basis that fits your needs. sticky.io recommends no less than once per day, prior to replication.

If your SFCC implementation receives tracking numbers directly or from an external system, enable the **sticky.io SFCC -> sticky.io Order Update** job on a recurring basis that suits your needs to push tracking numbers to sticky.io. If you would like to receive order tracking numbers from sticky.io, enable the **sticky.io sticky.io -> SFCC Order Update** job on a recurring basis that suits your needs.

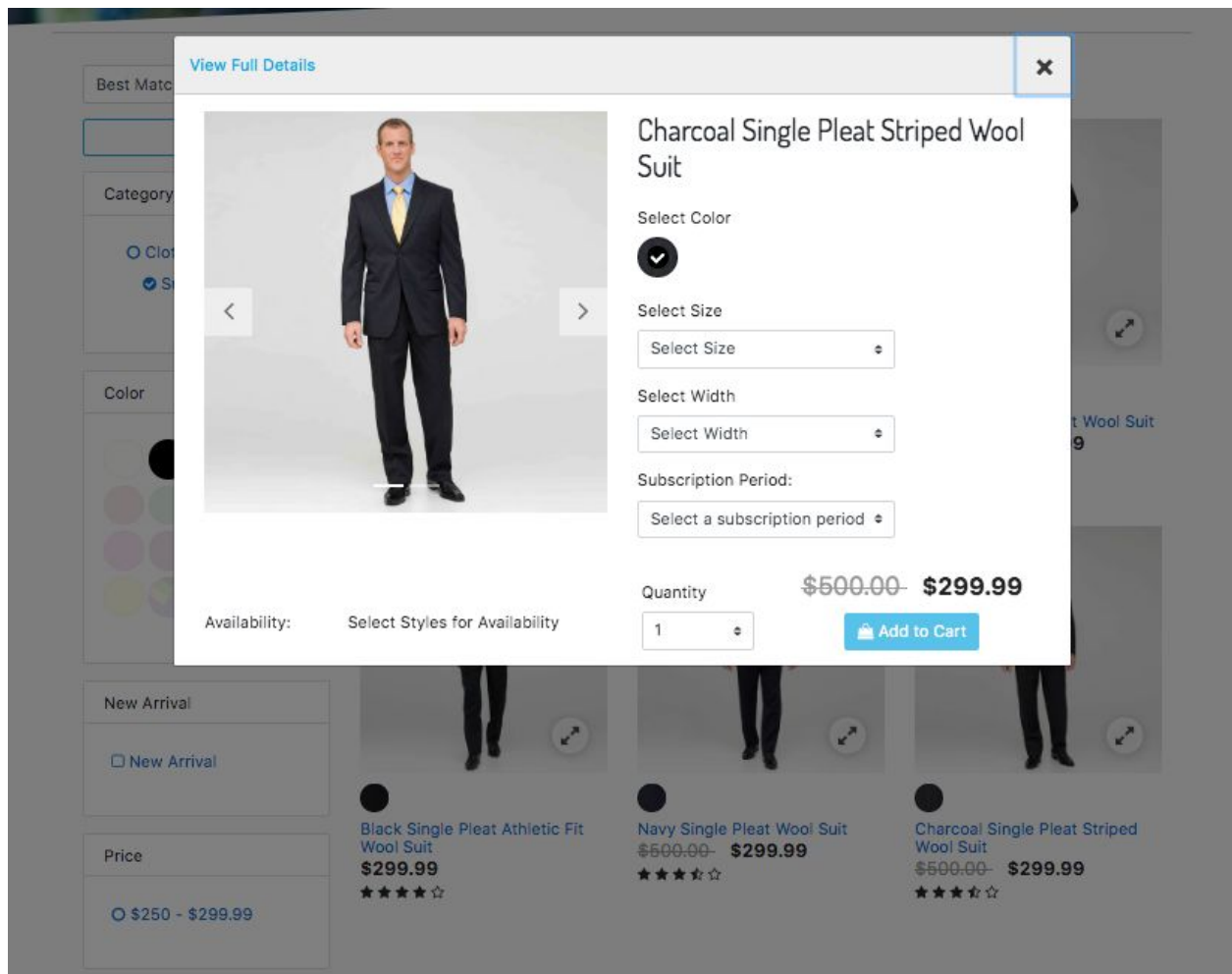
If your Shipping Methods change, please run the **sticky.io Shipping Methods Update** job to sync changes with sticky.io.

Storefront Functionality

Navigate to a subscription product.

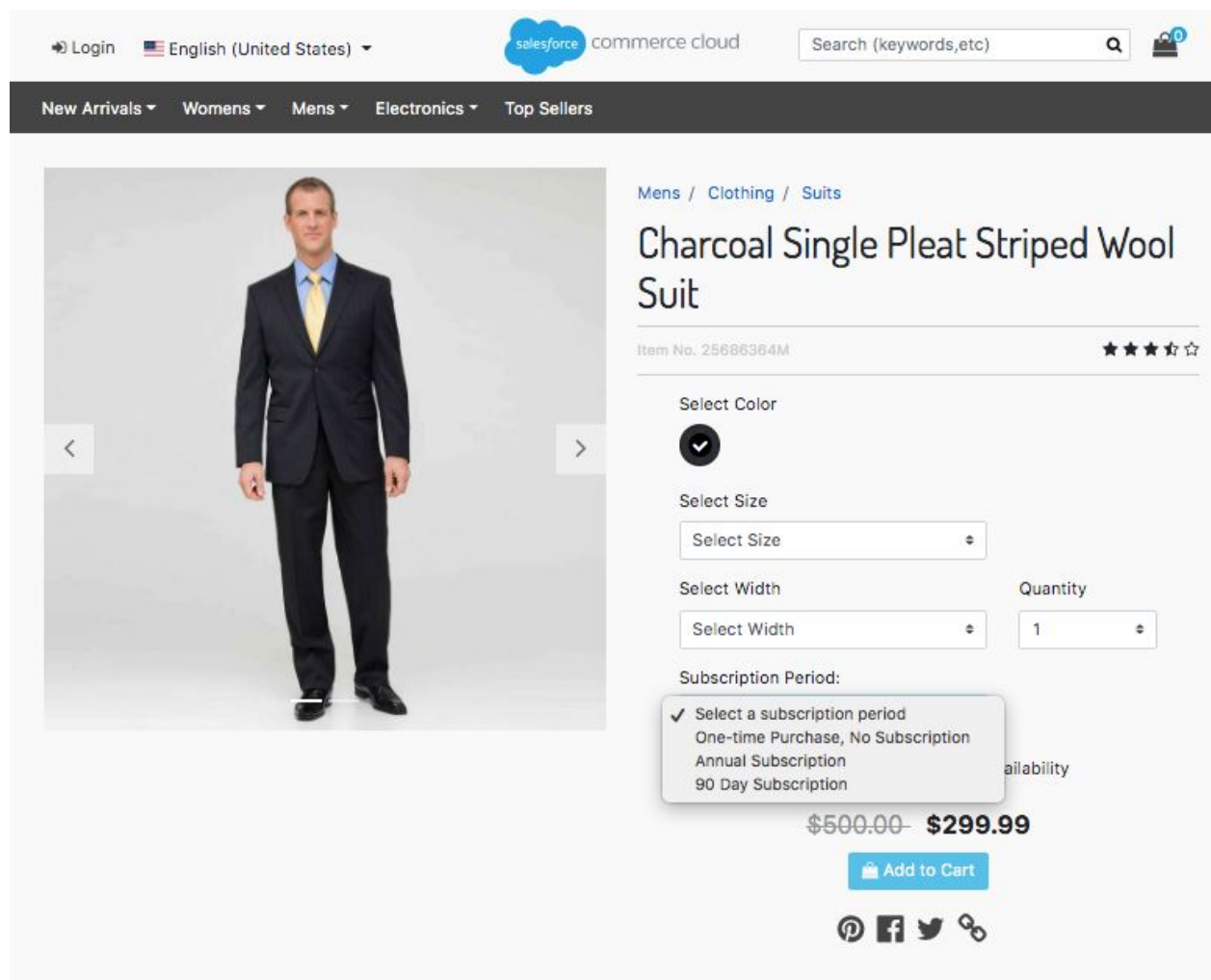


Or look at a subscription product via quick view.

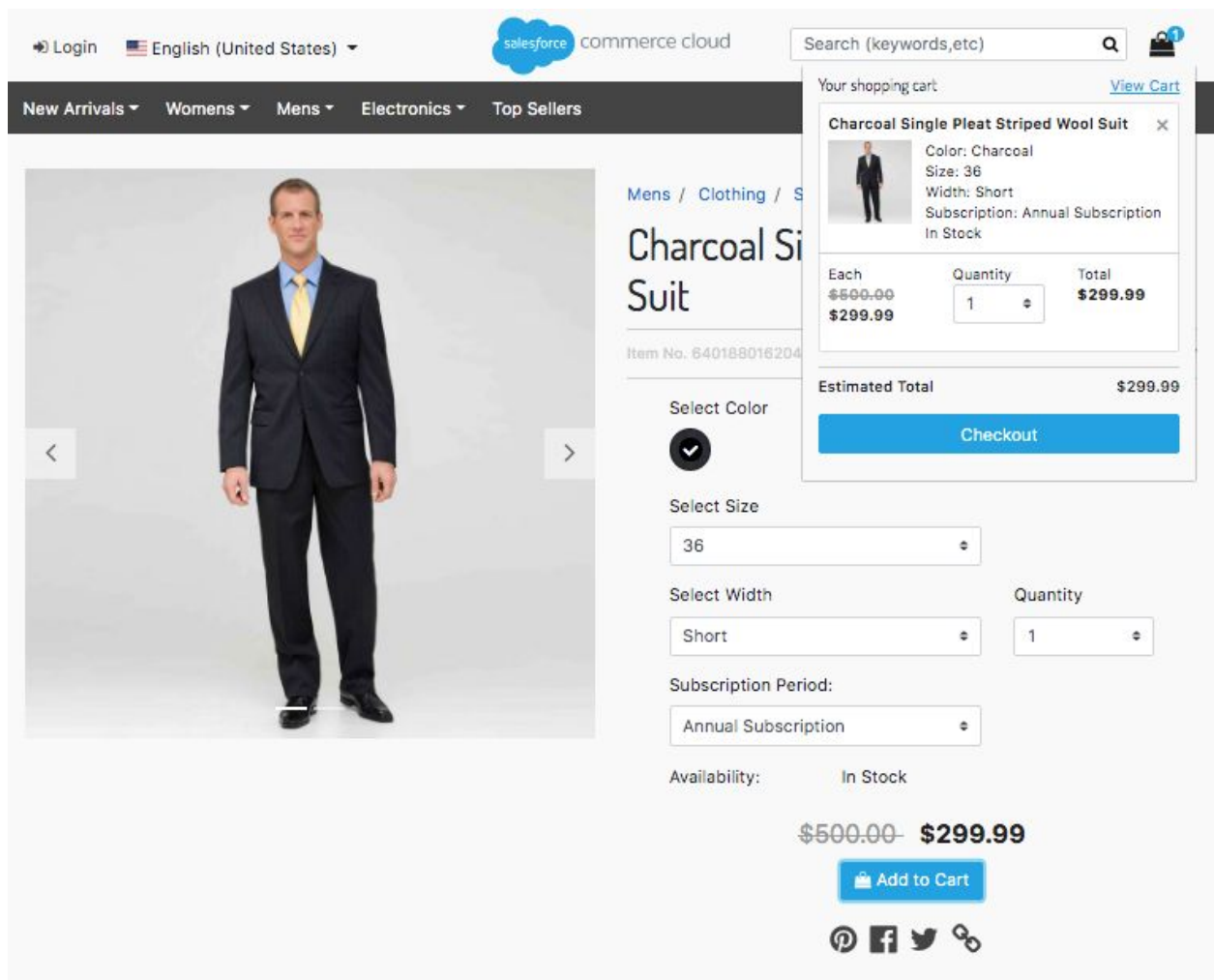


Pick the Subscription Period.

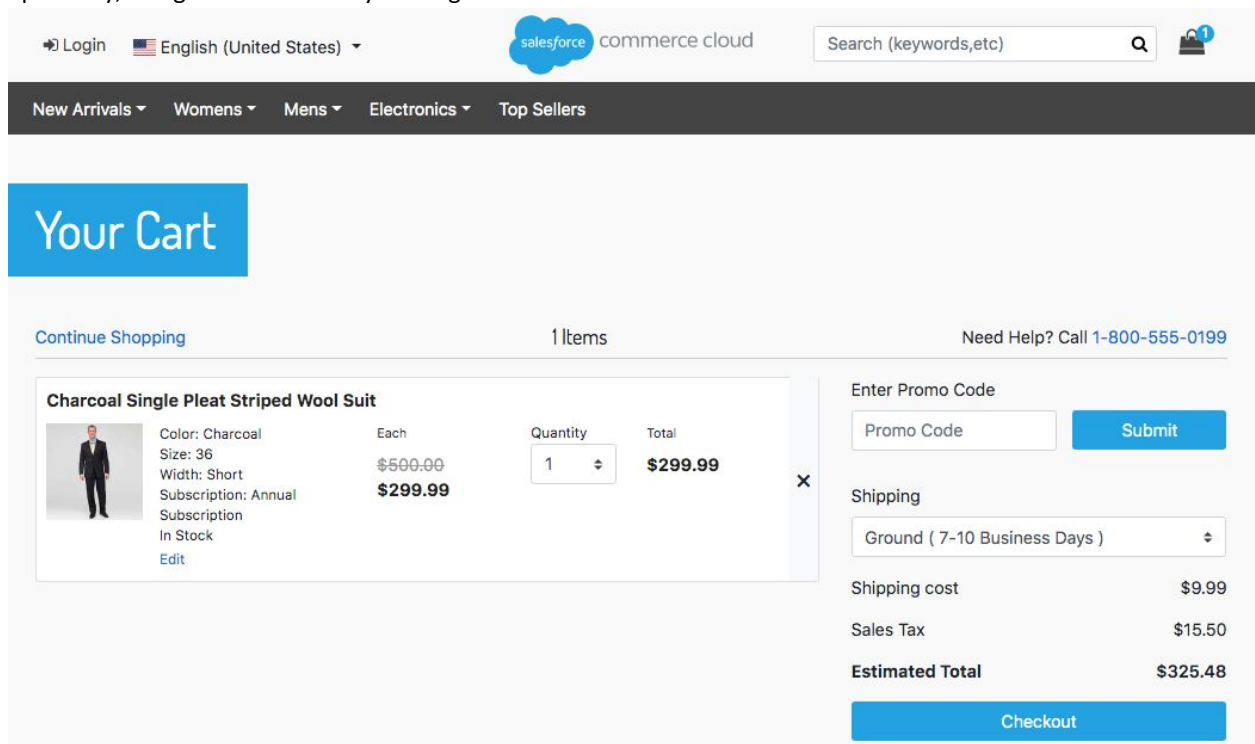
Notice that "Add to Cart" will not enable until a Subscription Period is picked.



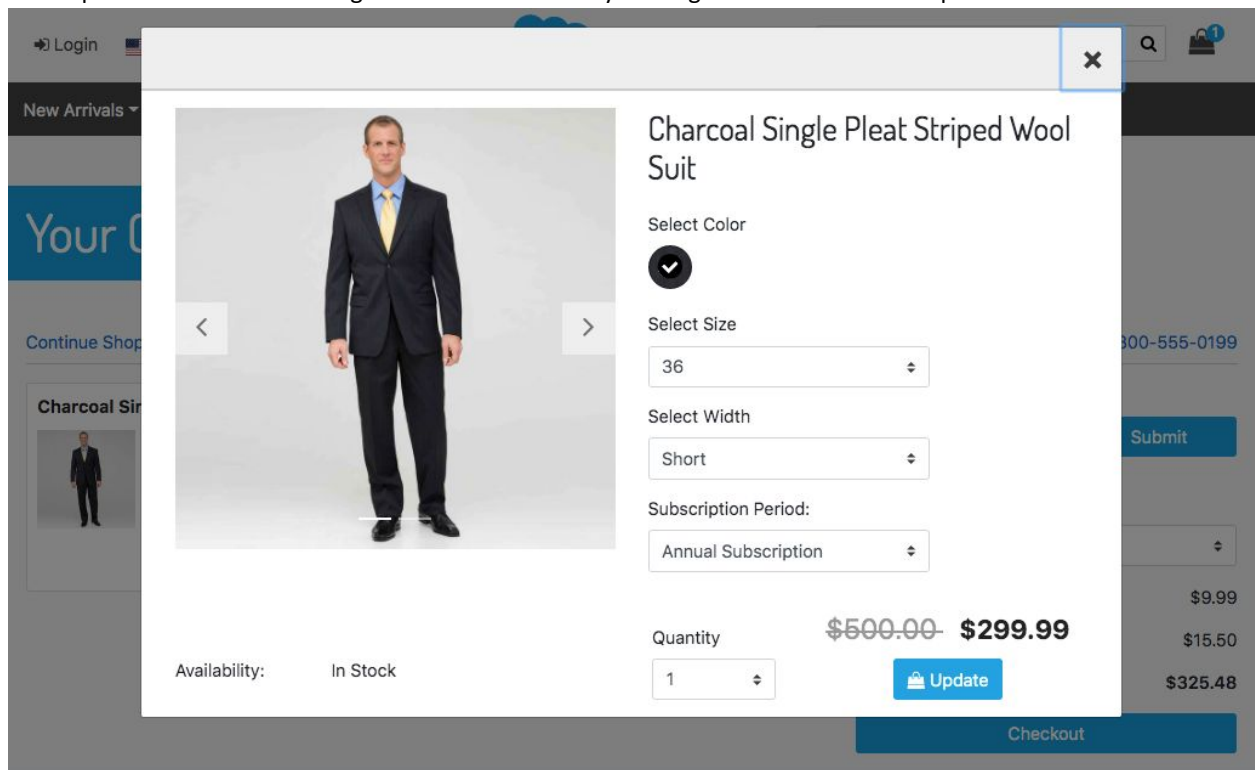
Notice the minicart.



Optionally, navigate to the Cart by clicking View Cart inside the minicart.

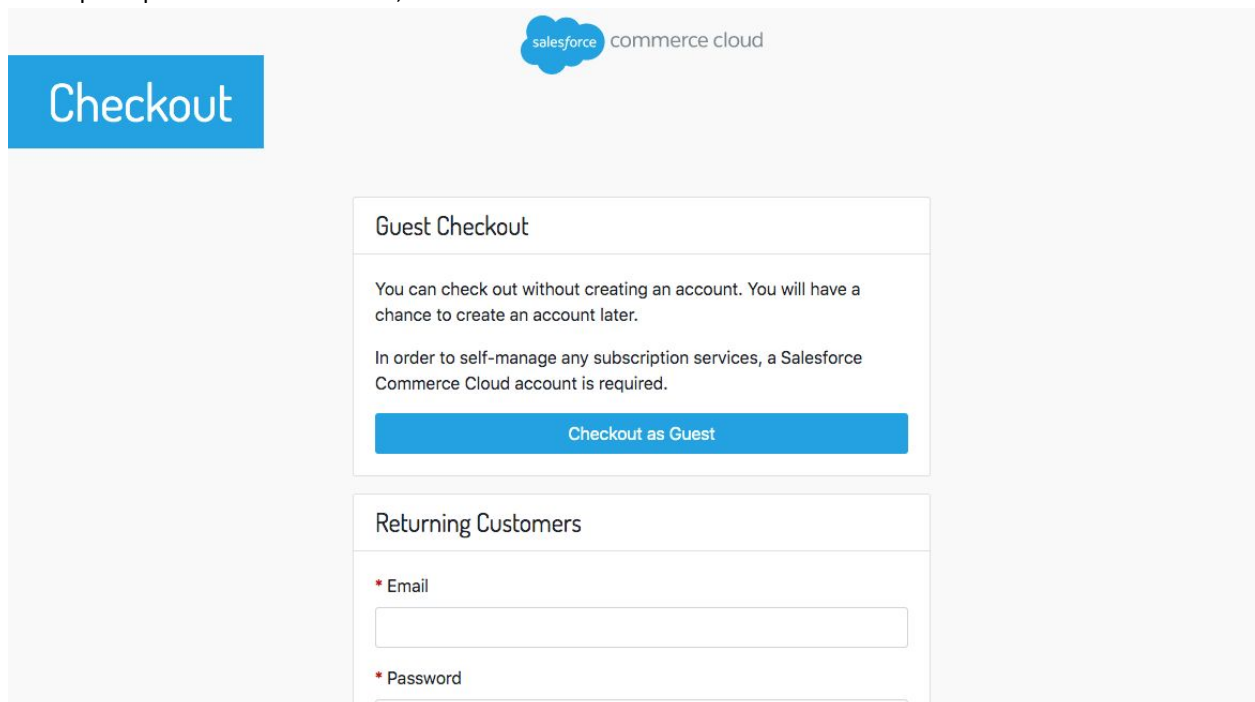


Subscription Period can be changed here if so desired by clicking the “Edit” link on the product card.



Proceed to Checkout.

Notice message about self-management. Merchant has control over forcing registered customers only when subscription products are in the cart, via a Custom Preference.



Purchase the product(s) as usual.

Confirmation screen either shows a reminder that an account is required for self-management, or to visit My Account to manage the newly purchased subscription product for logged-in customers.

sticky.io Customer
123 ABC Lane
Tampa FL 33606
me@customer.com
1234567890

Payment:
Credit Visa
*****1111
Ending 2/2021

1 Items. \$299.99

Charcoal Single Pleat Striped Wool Suit



Color: Charcoal
Size: 36
Width: Short
Subscription: Annual Subscription
Visit My Account to manage your subscription.

Quantity	Total
1	\$299.99

Subtotal. \$299.99

Shipping. \$9.99

Sales Tax. \$15.50

Total. \$325.48

[Continue Shopping](#)

Self-Managed Subscriptions

If a customer has purchased a subscription product while logged in to the Site, self-management services will be available to them. Should a customer require assistance, a CSR has access to the customer's order and all possible subscription management services via a Business Manager Extension located at *Merchant Tools > Ordering > sticky.io Order Management*. Your sticky.io representative can help you understand the myriad of options available to the CSR.

Orders

Search Order History Hide

From: Tracking #: Customer ID: City: Affiliate ID:

To: Shipping: Gateway ID: ZIP: Sub-Affiliate ID:

Order ID: Shipped Status: First Name: Phone: Confirm Status:

Campaign ID: Payment Type: Last Name: State: RMA #:

Transaction ID: Status: Email: Country: Billing Cycle:

Product ID: CC First Six: Address: IP: Routing/Account#:

Upsell ID: CC Last Four: Address 2: Test Order: Gift Order:

Hold Type: SHOW RESULTS CLEAR

Promo Code:

Import Orders for: Tracking: Select File: BROWSE IMPORT FORCE SHIP

Orders Features: ORDER DETAILS START RECURRING STOP RECURRING RESET RECURRING BLACKLIST ORDERS EXPORT CSV DELETE ORDERS

1 2 3 10

All self-managed subscription options are Merchant controllable, meaning the Merchant can turn off or on what the consumer can self-manage. These options are available in the new sticky.io Custom Preferences.

Merchant Tools / Site Preferences / Custom Site Preference Groups / sticky.io Configurations Cancel Apply to Other Sites Save

Instance Type:

Search by IDs... Q ▼


Name	Value	Default Value	
Allow Recurring Date Management	<input type="text"/>	Yes	Edit Across Sites
Allow the consumer to manage the recurring date of their subscription			
Allow Billing Model Update	<input type="text"/>	Yes	Edit Across Sites
Allow the consumer to change the billing model of their subscription			
Allow Pause	<input type="text"/>	Yes	Edit Across Sites
Allow the consumer to pause their subscription			
Allow Stop	<input type="text"/>	No	Edit Across Sites
Allow the consumer to stop their subscription - usually not a consumer-facing function			
Allow Terminate Next	<input type="text"/>	Yes	Edit Across Sites
Allow the consumer to stop their subscription after the next rebill			
Allow Resume/Un-pause	<input type="text"/>	Yes	Edit Across Sites
Allow the consumer to resume/un-pause a stopped subscription			
Allow Reset	<input type="text"/>	Yes	Edit Across Sites
Allow the consumer to reset their subscription			
Allow Bill Now	<input type="text"/>	Yes	Edit Across Sites
Allow the consumer to be billed "now" for their subscription			

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Once a consumer views an order's details, if that order contains subscription products, they will see the following. Merchant has control over the look and feel of this section by modifying the template (development experience required) located at: `int_stickyio_sfra/cartridge/templates/default/stickyio/subscriptionManagement.isml`

1 Items\$299.99

Charcoal Single Pleat Striped Wool Suit




Color: Charcoal
Size: 36
Width: Short
Subscription: Annual Subscription ⬆
Update Recurring Date: 2021-01-24
Subscription Management ⬆

Quantity	Total
1	\$299.99

1 Items\$299.99

Charcoal Single Pleat Striped Wool Suit



Color: Charcoal
Size: 36
Width: Short
Subscription: Annual Subscription ⬆
Update Recurring Date: 2021-01-24

✓ Subscription Management

Stop Subscription Options
Pause subscription
Stop on next rebill
Resume Subscription Options
Start subscription
Recur normally
Bill now

Total

\$299.99

After configuring a subscription product, a Merchant should attempt to add that product to the Cart and make a purchase in their Development environment. A re-bill can be forced via the sticky.io Order Management interface to test OCAPI re-bill functionality.

Unit tests are included for the extended product and productLineItem models.

6. Known Issues

- Multi/Split Shipping is not currently supported and is disabled at checkout if a cart contains subscription products.

- Registered customers that have a saved payment instrument will not be allowed to use that saved payment instrument for an order containing subscriptions and will be forced to re-enter the information. A later version of this Cartridge will accept saved payment instrument tokens and remove this restriction.
- Product Bundles are not yet supported.
- Trial configurations in Custom Offer are not yet supported
- sticky.io Offer Trial configurations are not currently supported.

7. Release History

Version	Date	Changes
20.1.0	2020-02-13	Initial release