



*Version 21.1.0*



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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 Offer types (Standard subscription, Prepaid, etc.), Billing Models (subscription frequencies), and Terms (cycles and discounts), 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 on the Merchant Site 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 Merchants have 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 and supporting files are outlined in the appropriate sections.

New Business Manager modules are located under the new “sticky.io” menu (Offer Configuration, Billing Model Configuration, Subscription Management, Subscription Analytics, and Site Shortcut to Custom Preferences).

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 within 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 and direct sticky.io order management
- Native order object contains sticky.io attributes for easy reference
- Support for up to three different subscription Offers per product, in addition to “Straight Sale”
- 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 consumer-accessible 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 OCAPI Client and a Business Manager user if using SFCC Unified Authentication.
- Implementor will need Administrative access to the Business Manager to 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, during which the Merchant will be provided an API username and password (added to sticky.io services within the Business Manager), and an “Instance Domain” (added to a Custom Preference). Both pieces of information 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:

The screenshot shows the 'RefArch - Settings' page under the 'Settings' tab. At the top, there is a note: 'Click Apply to save the details. Click Reset to revert to the last saved state.' Below this, the 'Instance Type' dropdown is set to 'Sandbox/Development'. A note states: '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.' There are fields for 'HTTP Hostname' and 'HTTPS Hostname', both currently empty. Under 'Instance Type: All', the 'Cartridges' field contains 'int\_stickyio\_sfra:app\_storefront\_base' and the 'Effective Cartridge Path' field contains 'int\_stickyio\_sfra:app\_storefront\_base:plugin\_apple\_pay:plugin\_facebook:plugin\_pinterest\_commerce:plugin\_web\_payments:bc\_content:core'. At the bottom right are 'Apply' and 'Reset' buttons.

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:

<b>Settings</b>	Cache	Hostnames
<h2>Business Manager - Settings</h2>		
Click <b>Apply</b> to save the details. Click <b>Reset</b> to revert to the last saved state.		
<b>Instance Type:</b> <input style="width: 150px; height: 20px; border: none; background-color: #f0f0f0; padding: 2px 5px;" type="button" value="Sandbox/Development"/>		
Deprecated. Up to two instance specific hostname aliases for Business Manager can be configured here.		
<b>HTTP Hostname:</b>	<input type="text"/>	
<b>HTTPS Hostname:</b>	<input type="text"/>	
<b>Instance Type:</b> All		
<b>Cartridges:</b>	<input type="text" value="bm_stickyio:bm_app_storefront_base"/>	
<b>Effective Cartridge Path:</b>	<input type="text" value="app_business_manager:plugin_apple_pay:plugin_facebook:plugin_pinterest_commerce:plugin_web_payments:bc_impebc_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 are 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, 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.

<b>Job Details</b>	
<b>Name</b>	<b>Description</b>
sticky.io Campaign Sync	Pulls latest Campaign/Offer/Billing Model information from sticky.io. <b>DO NOT CHANGE THIS JOB'S NAME.</b> 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 some Job Steps, including sending of email logs (to be used primarily as developer diagnostics) and the “wiping” or “resetting” of preferences stored by SFCC. Speak to your sticky.io representative if you think these settings might be right for you.

## 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.basic_auth	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.post.providers.sfccbridge	stickyio.http.post.v2
stickyio.http.post.order_void	stickyio.http.post.v1
stickyio.http.put.campaigns	stickyio.http.put.v2
stickyio.http.put.offers	stickyio.http.put.v2
stickyio.http.put.orders.custom_fields	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

Some Service Credentials are pre-configured in the Site Import, but also 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:*	sticky.io
URL:	https://(HOST)/api/{V}/{ENDPOINT}
User:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Apply"/> <input type="button" value="Reset"/>	

During development, it may be desirable to log service calls for diagnostic purposes. Below are the appropriate settings to establish in Custom Log Settings (*Administration > Operations > Custom Log Settings*). One can then find all sticky.io-related service calls in log files starting with the *service-stickyio* naming convention.

## Custom Log Filters

Active	Log Category	Log Level	
	Enter a log category...	WARN	Add
	root	WARN	
<input checked="" type="checkbox"/>	service	DEBUG	

## Custom Log Targets

Email: Messages with log level FATAL can be sent to email recipients.

Enter email address...	Add
------------------------	-----

Log Files: Select Log Levels Written to Files:

- FATAL
- ERROR
- WARN
- INFO
- DEBUG

## 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
Instance Domain	Provided by sticky.io - do not include "https://" or any slashes after the domain
Gateway ID	Provided by sticky.io
Kount Merchant ID	Provided by sticky.io
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 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. FALSE by default.

## Configuration

Custom Site Preferences' defaults should be sufficient for normal storefront operations. **Instance Domain is 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, though credentials (user and password) must be added and will be provided to you by your sticky.io representative. 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. On the left, there is a sidebar with the following menu items: 'Account Information', 'Account Details', 'Password', 'User', 'API Client', and 'Organization'. The 'User' item is currently selected. The main content area is titled 'Users' and contains the following text: 'These users are assigned to at least one of your organizations. Select one to control their access.' To the right of this text is a blue button labeled 'Add User'. Below the text, 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)'.

Click the “Add User” button.

The screenshot shows the 'Add User' form. The sidebar on the left remains the same as the previous screenshot. The main area is titled 'Add User' and contains the following text: 'Create a new user account or add an existing account to YOUR ORGANIZATION organization.' Below this text is a field labeled 'Email Address \*' with an empty input box. A yellow error message box below the input box says 'Please fill out all required fields.' At the bottom of the form are two buttons: a grey 'Add' button and a blue 'Cancel' button.

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:

**Account Manager**

The screenshot shows the 'API Clients' section of the Account Manager. On the left is a sidebar with links: Account Information, Account Details, Password, User, API Client (which is selected), and Organization. The main area has a heading 'API Clients' and a sub-instruction: 'These API clients are assigned to at least one of your organizations. Select one to control their access.' A blue button 'Add API Client' is on the right. Below is a dropdown filter 'Filter by organization:' set to 'YOUR ORGANIZATION'. A table lists one client:

API Client ID ▾	Display Name ▾	Enabled ▾
dcdf4d37-355e-4c32-bbdc-0b9d41ddc10e	sticky.io	true

Click the “Add API Client” button.

**Account Manager**

The screenshot shows the 'Add API Client' form. The sidebar on the left is identical to the previous screenshot. The main area has a heading 'Add API Client' and a sub-instruction: 'Create a new API Client'. Below is a section titled 'General Settings' with three input fields: 'Display Name\*' (empty), 'Password \*' (empty), and 'Confirm Password \*' (empty).

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.

The screenshot shows the 'Add API Client' form with additional settings. It includes dropdown menus for 'Token Endpoint Auth Method' (set to 'client\_secret\_basic') and 'Access Token Format' (set to 'UUID'). At the bottom are two buttons: 'Save' (highlighted in blue) and 'Cancel'.

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](#).

The screenshot shows a web-based configuration interface for the Open Commerce API. At the top, there are two dropdown menus: "Select Type" set to "Shop" and "Select Context" set to "Global (organization-wide)". Below these is a large text area containing the following XML code:

```
{
  "_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. If there are already settings present, please merge. 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. If there are already settings present, please merge. 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. Additionally, there are several permissions for manipulating sticky.io-related Shared Product Option objects. These permissions are required to enable storefront functionality.

Care has been taken to make sure OCAPI permissions are as restrictive and specific as possible.

## Template Overrides

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

*int\_stickyio\_sfra/cartridge/templates/default/account/dashboardProfileCards.isml  
 int\_stickyio\_sfra/cartridge/templates/default/account/orderDetails.isml  
 int\_stickyio\_sfra/cartridge/templates/default/cart/cart.isml  
 int\_stickyio\_sfra/cartridge/templates/default/cart/productCard/cartProductCard.isml  
 int\_stickyio\_sfra/cartridge/templates/default/checkout/billing/paymentOptions/creditCardContent.isml  
 int\_stickyio\_sfra/cartridge/templates/default/checkout/checkout.isml  
 int\_stickyio\_sfra/cartridge/templates/default/checkout/checkoutLogin.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/product/components/addToCartGlobal.isml  
 int\_stickyio\_sfra/cartridge/templates/default/product/components/addToCartProduct.isml  
 int\_stickyio\_sfra/cartridge/templates/default/product/components/options.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/product/quickView.isml  
 int\_stickyio\_sfra/cartridge/templates/default/product/setDetails.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 that contains only the merged templates.

## Custom Code

Re-bill orders pushed into 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. This hook also handles the updating of any desired sticky.io custom fields. If the Merchant has custom data that must be present in every re-bill order, sample code is provided to update that data in sticky.io.

In order to properly calculate prepaid subscription prices, a minor change has been made to the `dw.order.calculate` method, which is extended via `cartridge/scripts/hooks.json`, with the new file: `cartridge/scripts/hooks/cart/calculate.js`

Unfortunately, `server.replace` comes into play for the `Cart-GetProduct` route. SFRA is not built to handle products with multiple *selectable* Product Options, and this particular route only looks for, at most, one Product Option, which will cause an exception during a subsequent step as the number of Product Options are mismatched. We replace this route to avoid this condition.

## Storefront Name

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, manipulate catalog-level Shared Product Options, and add product-level attributes to drive cartridge functionality.

OCAPI affects Shared Product Options of all catalogs, storefront or otherwise, by adding and manipulating sticky.io-specific Shared Product Options. If changes have been made to sticky.io’s Offers, Billing Models, or Terms, it will be necessary to replicate Shared Product Options of catalogs for changes to take effect on other instances.

## Internal Interfaces

During the Campaign Sync Job, this Cartridge generates a `system-objecttype-extensions.xml` file and imports it on the fly. This file contains the latest Offers, Billing Models, and Terms from sticky.io and updates the local Product custom attributes with that data. Because of this, if changes have been made to sticky.io’s Offers, Billing Models, or Terms, it will be necessary to replicate System Objects for changes to take effect on other instances.

## 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 updated 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 Offers and Billing Models in sticky.io

sticky.io also includes an Analytics module, so it is up to the Merchant to determine what roles should have access to this data.

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 > sticky.io > Subscription Management*

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"/>
	Offer Configuration	<input checked="" type="checkbox"/>
	Billing Model Configuration	<input checked="" type="checkbox"/>
	Subscription Management	<input checked="" type="checkbox"/>
	Subscription Analytics	<input checked="" type="checkbox"/>
	Preferences	<input checked="" type="checkbox"/>

The screenshot shows the sticky.io Business Manager interface. At the top, there's a navigation bar with the Salesforce logo, a 'Sandbox - sticky.io RefArch' dropdown, 'Merchant Tools' and 'Administration' dropdowns, 'Storefront' and 'Toolkit' buttons, and user profile icons for 'Admin Admin'. Below the navigation is a green shield icon. The main area is titled 'sticky.io' and 'sticky.io Subscription Management'. It features six main menu items with icons: 'Offer Configuration' (Offer Configuration), 'Billing Model Configuration' (Billing Model Configuration), 'Subscription Management' (Subscription Management), 'Subscription Analytics' (Subscription Analytics), 'Preferences' (Preferences), and a 'sticky.io' logo icon.

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 > sticky.io > Subscription Management):**

The screenshot shows the 'Orders' section of the sticky.io Order Management interface. At the top, there's a 'Search Order History' form with various filters like 'From', 'To', 'Order ID', 'Campaign ID', 'Transaction ID', 'Product ID', 'Upsell ID', 'Tracking #', 'Shipping', 'Shipped Status', 'Payment Type', 'Status', 'CC First Six', 'Address', 'Customer ID', 'Gateway ID', 'First Name', 'Last Name', 'Email', 'IP', 'Address 2', 'City', 'ZIP', 'Phone', 'State', 'Country', 'Affiliate ID', 'Sub-Affiliate ID', 'Confirm Status', 'RMA #', 'Country', 'Billing Cycle', 'Hold Type', 'Promo Code', 'Offer ID', 'Billing Model ID', and 'Gift Order'. Below the search form are buttons for 'SHOW RESULTS' and 'CLEAR'. Underneath is a section for 'Import Orders for:' with 'Tracking' and 'Select File' dropdowns, and buttons for 'BROWSE', 'IMPORT', and 'FORCE SHIP'. There are also buttons for 'ORDERS DETAILS', 'START RECURRING', 'STOP RECURRING', 'RESET RECURRING', 'BLACKLIST ORDERS', 'EXPORT CSV', and 'DELETE ORDERS'. At the bottom, there's a grid of order details with columns for 'Approved', 'All', 'Hold', 'Cancellation', 'Subscriptions', 'Pending', 'Declines', 'Void/Refund', 'Shipped', 'Fraud', 'Chargeback', 'Return', 'Bad Shipping Address', 'Deleted', 'Order ID', 'Date/Time Stamp', 'Customer Name', 'Customer Email', 'Product Name', 'Amount', 'Qty', 'Campaign Name (ID)', 'Shipping Type', 'Next Recurring Date', 'Next Recurring Product', and 'Status'. A pagination bar with page numbers 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 is also visible.

## sticky.io Offer Configuration (*Merchant Tools > sticky.io > Offer Configuration*):

The screenshot shows the 'Offers' section of the Business Manager. The table lists two offers:

ID	Name	Offer Type	Recurring Type	Has Trial?	Expires	Updated
2	Prepaid Offer	Prepaid	One Time Purchase	No	No	03/17/2021
1	Standard	Standard	One Time Purchase	No	No	03/17/2021

Showing 1 to 2 of 2 rows.

## sticky.io Billing Model Configuration (*Merchant Tools > sticky.io > Billing Model Configuration*):

The screenshot shows the 'Billing Models' section of the Business Manager. The table lists three billing models:

ID	Name	Type	Default	Updated
4	Annually	Bill by relative date	No	03/17/2021
3	90 Days	Bill by cycle	No	03/17/2021
2	One Time Purchase	One Time Purchase	Yes	03/17/2021

Showing 1 to 3 of 3 rows.

## Setting up a Subscription Product

Before one can enable subscription options on a product, Offers and Billing Models must be configured in sticky.io. Your sticky.io representative can help you get started or guide you through the process. Offers and Billing Models can be updated at any time via the Business Manager.

Once Offers and Billing Models are established, navigate to a product in Business Manager for which you'd like to have subscription services enabled. Stand-alone Products, Master Products, and Product Sets may have subscriptions enabled.

For purposes of documentation, we will assume two Offers have already been set up in sticky.io: "Standard" and "Prepaid Offer", and two Billing Models: "90 Days" and "Annually."

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 shows the Salesforce interface with the following navigation path: Merchant Tools > Products and Catalogs > Products > 25686364M - General. The page title is "Charcoal Single Pleat Striped Wool Suit <25686364M>". A message at the top 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 note says: "Click Lock at the top of the page to edit this product. Click [Apply](#) to save changes. Click [Reset](#) to revert to the last saved state. Once you've completed the edits, click [Unlock](#) to release the product lock. To edit data in other languages, use the [Select Language](#) drop-down to define in which language you're viewing your data. Fields with a red asterisk (\*) are mandatory."

**General Tab:**

- ID: 25686364M
- Catalog: apparel-m-catalog
- Tax Class: Standard
- Searchable: Default (Yes)
- Searchable If Unavailable: Default (-None-)
- Name: Charcoal Single Pleat Striped Wool Suit
- Brand: (empty)
- Manufacturer: (empty)
- Manufacturer Product ID: (empty)
- Description: This suit is great for any occasion. Add a shirt and a tie and you are ready for any event.
- HTML Editor: (empty)
- Product Details: This suit is great for any occasion. Add a shirt and a tie and you are ready for any event.

**sticky.io Tab:**

- Subscription Product: Default (-None-)
- Allow One Time Purchase: Default (-None-)
- Offer 1: Default (-None-)
- Billing Models: Default (-None-)
  - 3 (90 Days)
  - 4 (Annually)
- Offer 2: Default (-None-)
- Billing Models: Default (-None-)
  - 3 (90 Days)
  - 4 (Annually)
- Offer 3: Default (-None-)
- Billing Models: Default (-None-)
  - 3 (90 Days)
  - 4 (Annually)
- Billing Model Consumer Selectable: Default (-None-)
- Prepaid Terms Consumer Selectable: Default (-None-)
- Product Vertical: -None-

sticky.io supports up to three distinct Offers per product, though more can be configured within the sticky.io system.

Mark the product as a Subscription Product by changing the Subscription Product attribute to “Yes.”

Choose the Offer(s) that fits your needs, and any combination of Billing Models that should be associated with that Offer. Select multiple Billing Models by holding down the Command or Control key.

The screenshot shows a configuration page for a product. It includes fields for 'Subscription Product' (set to 'Default'), 'Allow One Time Purchase' (set to 'Yes'), 'Offer 1' (set to '1 (Standard)'), 'Billing Models' (multiple dropdowns showing options like 'Default', 'None', '3 (90 Days)', and '4 (Annually)'), 'Offer 2' (set to '2 (Prepaid Offer)'), 'Billing Models' (multiple dropdowns showing options like 'Default', 'None', '3 (90 Days)', and '4 (Annually)'), 'Offer 3' (set to '-None-'), 'Billing Models' (multiple dropdowns showing options like 'Default', 'None', '3 (90 Days)', and '4 (Annually)'), 'Billing Model Consumer Selectable' (set to 'Yes'), 'Prepaid Terms Consumer Selectable' (set to 'Yes'), and 'Product Vertical' (set to '5 (Clothing & Apparel)').

Every subscription product has the ability to also be sold without a subscription by changing “Allow One Time Purchase” to “Yes.” By default, this will display as, “One Time Purchase, No Subscription” on the front-end, but this label is changeable and localizable via the `stickyio.properties` resource file.

“Billing Model Consumer Selectable” allows the consumer to choose what Billing Model they would like for their Offer. If this is not set to “Yes,” then no selection will be possible for the consumer. If multiple Billing Models are selected in the product configuration and “Billing Model Consumer Selectable” is set to “No” or “-None-,” then the first selected Billing Model will be used.

“Prepaid Terms Consumer Selectable” allows the consumer to choose Terms (cycles + discount) for Prepaid Offers, when available. If this property is set to “No” or “-None-,” only the first available Term will be used.

“Product Vertical” is not required, but may be helpful for analytics purposes.

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**. Job execution time will vary based on catalog size.

The screenshot shows the Salesforce Admin Tools - Jobs page. The top navigation bar includes links for 'Sandbox - sticky.io RefArch', 'Merchant Tools', 'Administration', 'Storefront', 'Toolkit', and user information ('Admin Admin'). The page title is 'Jobs'. A search bar at the top left contains 'Search by IDs...' and a magnifying glass icon. Below the search bar are buttons for 'Enable', 'Disable', 'Run', 'Delete', 'Priority ▾', and 'Refresh'. The main area displays a table of scheduled jobs:

ID	Status	Last Run	Execution Scope	Resources	Priority	Enabled	Delete
<a href="#">RebuildURLs</a>	-		2	-	0	<input checked="" type="checkbox"/>	
<a href="#">Reindex</a>	-		2	-	0	<input checked="" type="checkbox"/>	
<a href="#">sticky.io Campaign Sync</a>	-		RefArch	-	0	<input checked="" type="checkbox"/>	
<a href="#">sticky.io Product Sync</a>	-		RefArch	-	0	<input checked="" type="checkbox"/>	
<a href="#">stickyio SFCC-&gt;sticky.io Order Update</a>	-		RefArch	-	0	<input checked="" type="checkbox"/>	
<a href="#">sticky.io Shipping Methods Update</a>	-		RefArch	-	0	<input checked="" type="checkbox"/>	
<a href="#">sticky.io sticky.io-&gt;SFCC Order Update</a>	-		RefArch	-	0	<input checked="" type="checkbox"/>	

At the bottom of the page, there is a footer note: '© 2020 salesforce.com, inc. All Rights Reserved.' and 'RefArch Time Zone: Coordinated Universal Time | Instance Time Zone: Eastern Standard Time | Version: 20.2 Last Updated: Jan 21, 2020 (Compatibility Mode: 18.10)'.

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).

The screenshot shows a product page for a men's suit. At the top, there is a navigation bar with links for 'Login', 'New Arrivals', 'Womens', 'Mens', 'Electronics', and 'Top Sellers'. The main content area features a large image of a man wearing a dark suit, yellow shirt, and blue tie. Below the image are arrows for navigating through more product images. To the right of the image, the product title 'Charcoal Single Pleat Striped Wool Suit' is displayed, along with the item number 'Item No. 25686364M' and a five-star rating. A 'Select Color' dropdown menu is open, showing a checked option. Below it are dropdown menus for 'Select Size', 'Select Width', and 'Quantity' (set to 1). There are also sections for 'Subscription Period' with options for 'One-time Purchase, No Subscription', 'Standard', and 'Prepaid Offer', each with its own dropdown menu. Below these is a section for 'Availability' with a link to 'Select Styles for Availability'. The original price '\$500.00' is crossed out, and the discounted price '\$299.99' is shown in bold. A blue 'Add to Cart' button is located below the price. Social sharing icons for Pinterest, Facebook, Twitter, and Google+ are at the bottom.

## Campaigns & Promotions

Because sticky.io is deeply integrated with Salesforce Commerce Cloud, Subscription products can be targeted by the native Promotion Engine at a granular level. Salesforce Commerce Cloud is ultimately the record of truth when it comes to product pricing.

Promotions can target a Subscription Product based on its Offer, Billing Model, Prepaid terms, or any combination thereof.

Targeting Subscription Products is flexible and can be complex, but the easiest way to think about the various product attributes available for targeting is this:

sticky.io extends the Product object with several system-object custom attributes, including: `stickyioOffer1`, `stickyioOffer2`, `stickyioOffer3`, `stickyioBillingModels1`, `stickyioBillingModels2`, `stickyioBillingModels3`, `stickyioOneTimePurchase`. These attributes can be thought of as the options available to a consumer on the front-end.

Additionally, sticky.io creates “Shared Product Options” that are specifically created to allow for Promotion targeting *based on what the consumer adds to their cart*: stickyioOfferOptions, stickyioBillingModelOptions, stickyioTermOptions

When setting up a promotion, keep in mind that just because an Offer or Billing Model is available to a consumer (Product custom attributes), does not mean that is what the consumer has actually selected, is allowed to select, or has added to their cart (Shared Product Options). Shared Product Options are always present (even if they can't be seen), so we make sure our promotion is only applicable if the visual/consumer-selectable layer is present as well.

Promotional pricing is applied and visible once a product is added to a cart.

As with all Salesforce Promotions, experimentation will be necessary to understand how one Promotion or qualifier influences another.

### Prepaid Example

In the following example, we've pre-configured a Campaign to hold our Promotion, and created a Promotion that targets our Prepaid Offer (OfferID #2, as can be seen in the Product Configuration) and the Prepaid Terms of “3 cycles at 20% off,” as configured in sticky.io.

It is important to note that when targeting Prepaid Terms in the Promotion engine, one must know the TermID. TermID consists of the parent OfferID + the Term Cycles. In our example, our TermID, for OfferID #2, will be: 2-3

The screenshot shows the Salesforce Marketing Cloud interface for managing promotions. The top navigation bar includes 'Sandbox - sticky.io RefArch', 'Merchant Tools', 'Administration', 'Storefront', and 'Toolkit'. The user is in the 'Merchant Tools > Online Marketing > Promotions' section, viewing a promotion named 'Prepaid Offer 20 Percent'.

**Status:** Active Promotion Rule: 20% on discounted products if qualifying product amount >= \$1.00

**General**

You can manage general and custom promotion attributes in this section. The Status field indicates if the promotion is active or inactive (to be active, a promotion must be both scheduled and enabled). The Name field provides a short description of the promotion (typically used in the cart). The Callout Message field provides a slightly more detailed message (typically used on a product detail page). The Promotion Details field is generally used for legal messaging, like print and other info about the promotion. To schedule or modify promotion qualifiers (customer groups, source codes or coupons), you must assign the promotion to a campaign or A/B test. You can see where the promotion is scheduled in the Schedule/Qualifiers/Compatibility section. Click the Apply button at the bottom of each panel ("General" or "Promotion Rule") to save the data for that section.

**Select Language:** Default

ID:	Prepaid Offer 20 Percent
Name:	Prepaid Offer
Currency:	All
Enabled:	Yes
Archived:	No
Searchable:	No

Callout Message: 20% off when you pre-pay for three cycles!

Promotion Details: Pick annual or every 90 days.

**Tags:**  Add New Tag

**Image:**

**Compatibility**

To control this promotion's interaction with other promotions, configure compatibility settings. To control how this promotion generally combines with other promotions, set the Exclusivity. This general exclusivity rule can be overridden by combinable and mutually exclusive promotions. Adding promotions to Exclusivity Groups streamlines the compatibility settings process. You can assign individual promotions or entire groups as Combinable Promotions or Mutually Exclusive Promotions. Check the spelling and capitalization of your promotion and group IDs. If the value doesn't match an existing promotion or group, there is no change in behavior.

Exclusivity:	NO (Can be combined with any promotion.)
Exclusivity Group:	<input type="text"/>
Combinable Promotions:	<input type="text"/> Add Another Value
Mutually Exclusive Promotions:	<input type="text"/> Add Another Value

**Promotion Rule**

Select the Promotion Class you want ("Product", "Order", "Shipping"), then choose from the promotion types available for the respective promotion class.

\* For Product promotions, create discounts and specify Qualifying Products (the products which trigger the discount) and Discounted Products (the products to which the discount is applied).

\* For Order promotions, create discounts and optionally specify Excluded Products and Discounted Products. Excluded products don't contribute to the merchandise condition and aren't discounted. If "Qualifying Products" is left empty, all non-excluded products in the order contribute towards the merchandise condition. Otherwise, the specified amount of qualifying products is required to trigger the discount.

\* For Shipping promotions, create discounts and specify Qualifying Products and Shipping Methods. For promotions based on a certain number of qualifying products, qualifying products are mandatory. For promotions based on a certain amount of qualifying products, qualifying products are optional. If left empty, all products in the shipment contribute towards the merchandise condition. One of the specified shipping methods must be selected in the Storefront to trigger the discount.

Multiple Discount tiers are available for some promotion types. Click Add to create multiple tiers or delete an existing tier by clicking the removal icon. Maximum Applications limits the number of times the promotion can be applied per order.

**Example:** Buy 100 or more qualifying products and get 10 percent on discounted products.

**Promotion Class:** Product With Amount of Qualifying Products ▾

**Discount:** Buy 1.00 or More and Get 20 Percent Off ▾

**Add**

**Qualifying Products:** Products with option 'stickyioTermOptions (ambiguous)' = '2-3' and with attribute 'stickyioOffer1' = '2' and products with option 'stickyioTermOptions (ambiguous)' = '2-3' and with attribute 'stickyioOffer2' = '2' and products with option 'stickyioTermOptions (ambiguous)' = '2-3' and with attribute 'stickyioOffer3' = '2'

**Edit**

**Discounted Products:**  Same as qualifying products  
Products with option 'stickyioTermOptions (ambiguous)' = '2-3' and with attribute 'stickyioOffer1' = '2' and products with option 'stickyioTermOptions (ambiguous)' = '2-3' and with attribute 'stickyioOffer2' = '2' and products with option 'stickyioTermOptions (ambiguous)' = '2-3' and with attribute 'stickyioOffer3' = '2'

**Edit**

**Payment Methods:** No payment methods have been selected yet.

**Edit**

**Restrictions:**  The promotion applies to identical products only. May apply up to the application limit for each separate product.

**Maximum Applications:** Per Order

**Prorate Discount:**  Prorates the discount across eligible items

**Apply**

**Schedule/Qualifiers/Compatibility**

ID	Description	Type	Schedule	Customer Groups	Source Codes	Coupons	Required Qualifiers
Prepaid Campaigns		Campaign	Continuously	Everyone			Any

**Included Products**

**Add Include** **Add Exclude**

**Global product exclusions are enabled for the entire promotion.**

**Disable Global Product Exclusions:**  No

**Included Products 1**

Qualifier	Operator	Value	Catalog
Product Option ID 'stickyioTermOptions'	equals	2-3	<input type="button" value="Remove"/>
Offer 1 (custom.stickyioOffer1)	equals	2 (Prepaid Offer)	<input type="button" value="Remove"/>

**Add**

**Included Products 2**

Qualifier	Operator	Value	Catalog
Product Option ID 'stickyioTermOptions'	equals	2-3	<input type="button" value="Remove"/>
Offer 2 (custom.stickyioOffer2)	equals	2 (Prepaid Offer)	<input type="button" value="Remove"/>

**Add**

**Included Products 3**

Qualifier	Operator	Value	Catalog
Product Option ID 'stickyioTermOptions'	equals	2-3	<input type="button" value="Remove"/>
Offer 3 (custom.stickyioOffer3)	equals	2 (Prepaid Offer)	<input type="button" value="Remove"/>

**Add**

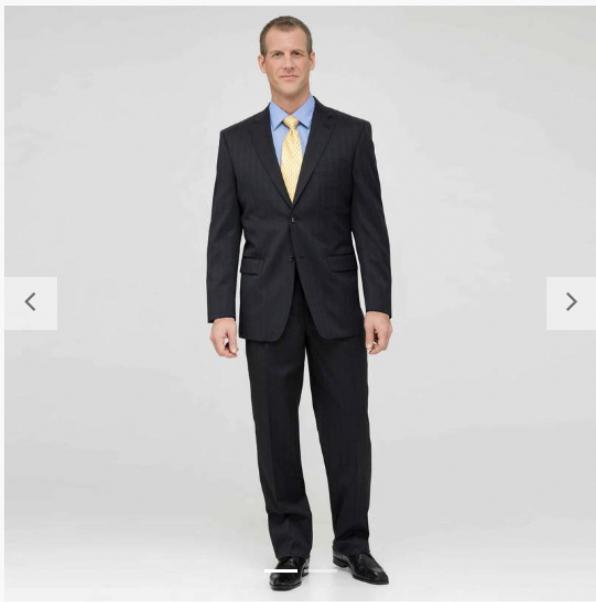
Campaign Continuously Everyone **Save** **Cancel**

These rules specify that if the Prepaid Offer is available as any one of the three Offer Types for a Product, AND the consumer selected Prepaid Offer terms with 3 cycles, apply a 20% discount.

[Login](#)

commerce cloud

Search (keywords,etc)

[New Arrivals](#) ▾ [Womens](#) ▾ [Mens](#) ▾ [Electronics](#) ▾ [Top Sellers](#)[Mens](#) / [Clothing](#) / [Suits](#)

## Charcoal Single Pleat Striped Wool Suit

Item No. 25686364M



Select Color



Select Size

Select Size

Select Width

Select Width

Quantity

1

Subscription Period:

 One-time Purchase, No Subscription Standard

Select a subscription period

 Prepaid Offer

Select a subscription period

Select subscription terms

Availability:

Select Styles for Availability

20% off when you pre-pay for three cycles!



Pick annual or every 90 days.

\$500.00 - \$299.99

Add to Cart



Your shopping cart

[View Cart](#)

## Charcoal Single Pleat Striped Wool Suit X



Color: Charcoal

Size: 36

Width: Short

Subscription: Annually - 3 cycles at  
20% off (prepaid)

In Stock

Each

~~\$500.00~~

**\$299.99**

Quantity

1

Total

~~\$899.97~~

**\$719.98**

20% off when you pre-pay for three cycles!

**Estimated Total**

**\$719.98**

**Checkout**

### Subscribe & Save Example

In the following example, we've pre-configured a Campaign to hold our Promotion, and created a Promotion that targets a specific product added to the cart with available Billing Model #4 (as configured in sticky.io), to give the customer 50% when purchasing an Annual Subscription.

Please note that we are targeting both the Product attribute `stickyioBillingModel1` **and** the Shared Product Option `stickyioBillingModelOptions`. This is because Shared Product Options are always present (even if they can't be seen), so we make sure our promotion is only applicable if the visual/consumer-selectable layer is present as well.

Sandbox - sticky.io Refresh Merchant Tools Administration Storefront Toolkit

Merchant Tools > Online Marketing > Promotions > Promotion: Subscribe & Save

### Subscribe & Save

Status: Active Promotion Class: Product Promotion Rule: 50% on discounted products if qualifying product amount >= \$1.00

**General**

You can manage general and custom promotion attributes in this section. The Status field indicates if the promotion is active or inactive to be active, a promotion must be both scheduled and enabled. The Name field provides a short description of the promotion typically used in the UI. The Callout Message field provides a slightly more detailed message typically used on a product detail page. The Promotion Details field is generally used for legal messaging, the print, and other details about the promotion. To schedule or modify promotion qualifiers (customer groups, source codes or coupons), you must assign the promotion to a campaign or A/B test. You must do this from within the specific campaign or A/B test. You can see where the promotion is scheduled in the Schedule/Qualifiers/Compatibility section. Click the Apply button at the bottom of every panel ("General" or "Promotion Rule") to save the data for that section.

Select Language: Default

ID:  Name:  Currency: All Enabled: Yes Archived: No Searchable: No

Callout Message: Purchase an annual subscription to save!

HTML Editor

Promotion Details: 50% Off if you purchase annually!

HTML Editor

Tags:  Add New Tag:  Add

Image:

**Compatibility**

To control this promotion's interaction with other promotions, configure compatibility settings. To control how this promotion generally combines with other promotions, set the Exclusivity. This general exclusivity rule can be overridden by combinable and mutually exclusive promotions. Adding promotions to Exclusivity Groups streamlines the compatibility settings process. You can assign individual promotions or entire groups as Combinable Promotions or Mutually Exclusive Promotions. Check the spelling and capitalization of your promotion and group IDs. If the value doesn't match an existing promotion or group, there is no change in behavior.

Exclusivity: NO (Can be combined with any promotion.)

Exclusivity Group:

Combinable Promotions:  Add Another Value

Mutually Exclusive Promotions:  Add Another Value

**Promotion Rule**

Select the Promotion Class you want ("Product", "Order", "Shipping"), then choose from the promotion types available for the respective promotion class.

\* For Product promotions, create discounts and specify Qualifying Products (the products which trigger the discount) and Discounted Products (the products to which the discount is applied).  
 \* For Order promotions, create discounts and optionally specify Excluded Products and Qualifying Products. Excluded products don't contribute to the merchandise condition and aren't discounted. If "Qualifying Products" is left empty, all non-excluded products in the order contribute towards the merchandise condition. Otherwise, the specified amount of qualifying products is required to trigger the discount.  
 \* For Shipping promotions, create discounts and specify Qualifying Products and Shipping Methods. For promotions based on a certain number of qualifying products, qualifying products are mandatory. For promotions based on a certain amount of qualifying products, qualifying products are optional. If left empty, all products in the shipment contribute towards the merchandise condition. One of the specified shipping methods must be selected in the Storefront to trigger the discount.

Multiple Discount tiers are available for some promotion types. Click Add to create multiple tiers or delete an existing tier by clicking the removal icon. Maximum Applications limits the number of times the promotion can be applied per order.

Example: Buy 100 or more qualifying products and get 10 percent off discounted products.

Promotion Class: Product With Amount of Qualifying Products

Discount: Buy 1.00 or More and Get 50 Percent Off

Qualifying Products: Products with ID = 'P0150M' and with option 'stickyioBillingModelOptions (ambiguous)' = '4' and with attribute 'stickyioBillingModels1' = '4'

Discounted Products: Same as qualifying products  
 Products with ID = 'P0150M' and with option 'stickyioBillingModelOptions (ambiguous)' = '4' and with attribute 'stickyioBillingModels1' = '4'

Payment Methods: No payment methods have been selected yet.

Restrictions:  The promotion applies to identical products only. May apply up to the application limit for each separate product.

Maximum Applications:  Per Order

Prorate Discount:  Prorates the discount across eligible items

**Schedule/Qualifiers/Compatibility**

ID	Description	Type	Schedule	Customer Groups	Source Codes	Coupons	Required Qualifiers
Subscribe & Save	Subscribe & Save!	Campaign	Continuously	Everyone			Any

**NUMBER OF QUALIFYING PRODUCTS**

Add Include Add Exclude

Global product exclusions are enabled for the entire promotion.

Disable Global Product Exclusions:

**Included Products 1**

Qualifier	Operator	Value	Catalog
ID	equals	P0150M(Upright Case (33L - 3.7Kg))	
Product Option ID 'stickyioBillingModelOptions'	equals	4	
Billing Models (custom.stickyioBillingModels1)	equals	4 (Annually)	

Please eligible items.

FREE 2-Day SHIPPING FOR ORDERS OVER \$300



[Login](#)



commerce cloud

Search (keywords,etc)



New Arrivals ▾ Womens ▾ Mens ▾ Electronics ▾ Top Sellers



Mens / Accessories / Luggage

## Upright Case (33L - 3.7Kg)

Item No. P0150M



Quantity

1

Subscription Period:

Standard

Select a subscription period

Availability: In Stock

Purchase an annual subscription to save!

50% Off if you purchase annually!

**\$99.99**

Add to Cart





Your shopping cart

[View Cart](#)**Upright Case (33L - 3.7Kg)**

Subscription: Annually  
In Stock

Each

**\$99.99**

Quantity

Total

~~\$99.99~~**\$49.99**

Purchase an annual subscription to save!

**Estimated Total****\$49.99**[Checkout](#)

## Localization

`int_stickyio_sfra/cartridge/templates/resources/stickyio.properties` contains localization strings. It is also possible to localize the names of Offers, Billing Models, and Prepaid Terms that are setup in sticky.io. Examples are not included in this file as to not override any sticky.io settings, but the following convention can be applied, if desired, where the `_#` part of the localization key refers to the ID of the Offer, Billing Model, or Prepaid Term:

```
productdetail.label.offer_1=Standard
productdetail.label.billingmodel_3=Billing Model #3
productdetail.label.terms_2-3=Three Cycles
```

If these localization strings are not present, the value set in sticky.io will be used.

## 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.

The screenshot shows a product page for a Charcoal Single Pleat Striped Wool Suit. The top navigation bar includes links for Login, commerce cloud, Search (keywords, etc), and a shopping cart icon. Below the navigation is a secondary menu with New Arrivals, Womens, Mens, Electronics, and Top Sellers. The main content area features a large image of a man wearing the suit, with left and right arrows for navigating through multiple images. To the right of the image, the product title "Charcoal Single Pleat Striped Wool Suit" is displayed above the item number "Item No. 25686364M". A five-star rating icon is shown. Below the title, there are dropdown menus for "Select Color" (with a black circle selected) and "Select Size". There are also dropdowns for "Select Width" and "Quantity" (set to 1). Under "Subscription Period", there are three options: "One-time Purchase, No Subscription" (radio button selected), "Standard" (radio button), and "Prepaid Offer". For the "Standard" option, there are dropdowns for "Select a subscription period" and "Select subscription terms". At the bottom, there are buttons for "Availability" (disabled), "Select Styles for Availability" (disabled), and a prominent blue "Add to Cart" button. Below the "Add to Cart" button are social sharing icons for Pinterest, Facebook, Twitter, and Google+.

Or look at a subscription product via quick view.

Best Matches

View Full Details

Category

Clothings

Suits

Color



Charcoal Single Pleat Striped Wool Suit

Select Color

Select Size

Select Width

Subscription Period:

- One-time Purchase, No Subscription
- Standard
  - Select a subscription period
- Prepaid Offer
  - Select a subscription period
  - Select subscription terms

Availability: Select Styles for Availability

Quantity

\$500.00 **\$299.99**

Notice for a Master Product, Subscription Period is disabled. It will enable once an available variation is picked.  
Pick the Subscription Period.

Notice that "Add to Cart" will not enable until a valid Subscription Period Offer/Billing Model combination is picked.

[Login](#) ▾

 salesforce commerce cloud

Search (keywords,etc) 

[New Arrivals](#) ▾ [Womens](#) ▾ [Mens](#) ▾ [Electronics](#) ▾ [Top Sellers](#) 



Mens / Clothing / Suits

## Charcoal Single Pleat Striped Wool Suit

Item No. 640188016204M 

Select Color 

Select Size

Select Width

Quantity

Subscription Period:

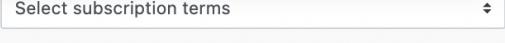
One-time Purchase, No Subscription

Standard

Select a subscription period

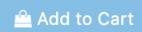
90 Days

Annually 

Select subscription terms 

Availability: In Stock

\$500.00 - **\$299.99**



Notice the minicart.

salesforce commerce cloud

New Arrivals ▾ Womens ▾ Mens ▾ Electronics ▾ Top Sellers



Mens / Clothing / S

## Charcoal Si Suit

Item No. 640188016204

Select Color

Color: Charcoal

Size: 36

Width: Short

Subscription: Annually

In Stock

Each \$500.00 \$299.99

Quantity 1

Total \$299.99

Estimated Total \$299.99

**Checkout**

Select Size

36

Select Width

Short

Quantity

1

Subscription Period:

One-time Purchase, No Subscription

Standard

Annually

Prepaid Offer

Select a subscription period

Select subscription terms

Availability: In Stock

\$500.00 - \$299.99

**Add to Cart**

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

## Your Cart

[Continue Shopping](#)

1 Items

Need Help? Call 1-800-555-0199

Charcoal Single Pleat Striped Wool Suit	
	Color: Charcoal
Size: 36	Each
Width: Short	\$500.00
Subscription: Annual	<b>\$299.99</b>
Subscription	
In Stock	
<a href="#">Edit</a>	

Enter Promo Code

Promo Code

## Shipping

Ground ( 7-10 Business Days )

Shipping cost \$9.99

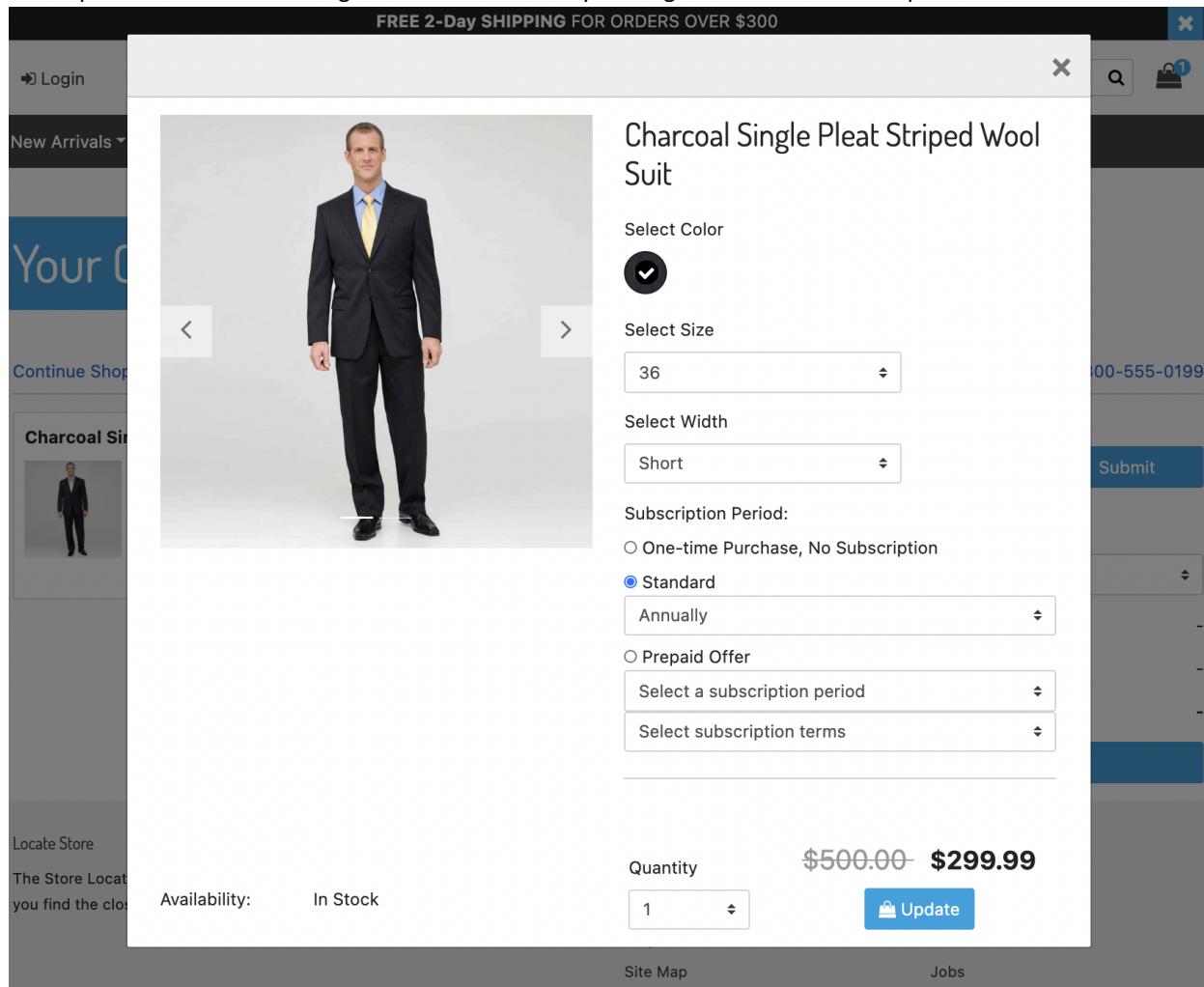
Sales Tax \$15.50

**Estimated Total**

ANSWER

[Checkout](#)

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.

The screenshot shows the Salesforce Commerce Cloud Guest Checkout interface. At the top right is the Salesforce commerce cloud logo. A large blue button on the left says "Checkout". Below it is a section titled "Guest Checkout" containing text about guest checkout and account creation. A blue button labeled "Checkout as Guest" is present. To the right is a section titled "Returning Customers" with fields for "Email" and "Password".

**Guest Checkout**

You can check out without creating an account. You will have a chance to create an account later.

In order to self-manage any subscription services, a Salesforce Commerce Cloud account is required.

**Checkout as Guest**

**Returning Customers**

\* Email

\* Password

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 7/2024

**1 Items . . . . . \$299.99**

### Charcoal Single Pleat Striped Wool Suit



Color: Charcoal  
Size: 36  
Width: Short  
Subscription: Annual Subscription  
[Manage your subscription](#)

Quantity	Total
1	<b>\$299.99</b>

Subtotal. . . . . \$299.99  
Shipping . . . . . \$9.99  
Sales Tax. . . . . \$15.50  
**Total. . . . . \$325.48**

[Continue Shopping](#)

Order details within Business Manager will include any subscription and/or promotion data:

The screenshot shows the Business Manager interface with the following navigation path: Merchant Tools > Ordering > Orders > Order: 00000605(RefArch). The main content area displays "Details for Order '00000605'". It includes sections for Information, Order Status, Shipping Status, and Shipment 00002501. The Shipment section lists items with their descriptions, quantities, and unit prices. At the bottom right, there are "Send Email" and "Print Order" buttons.

Information:	Contains 1 line item to 1 shipping location The total price is \$1,066.74.				
Date Received:	3/26/21 5:10:22 pm Etc/UTC				
Site:	RefArch				
Created By:	Customer				
Customer:	sticky.io				
Customer No.:	<a href="#">00000004</a>				
IP Address:	127.0.0.1				
Email:	<a href="#">product@sticky.io</a>				
Phone:	123-123-1234				
Order Status:	Open		Confirmation Status:	Confirmed	
Shipping Status:	Not Shipped		Export Status:	Ready for Export	
<b>Shipment 00002501</b>					
Qty	Product ID	Name	Manufacturer	Tax Rate	Unit Sales Price
1	640188016204M	Charcoal Single Pleat Striped Wool Suit Adjustment Prepaid Offer \$500 Off		5.00 %	\$1,499.95
2		1 of Offer: Prepaid Offer	n/a	5.00 %	\$0.00
3		1 of Billing Model: 90 Days	n/a	5.00 %	\$0.00
2-5		1 of Prepaid Term: 5 cycles at \$500.00 off	n/a	5.00 %	\$0.00
Shipment Shipping Cost: \$15.99					
Total Shipping Cost (001): \$15.99					
Shipping Total: \$15.99					
Tax Total: \$56.80					
Total: \$1,066.74					
<a href="#">Send Email</a> <a href="#">Print Order</a>					

## 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 > sticky.io > Subscription Order Management*. Your sticky.io representative can help you understand the myriad of options available to the CSR.

The screenshot shows the sticky.io Subscription Order Management interface with the following navigation path: sticky.io > Subscription Order Management. The main content area displays "Orders". It includes a search bar for "Search Order History" with various filters like From, To, Order ID, Transaction ID, Product ID, and Upsell ID. Below the search bar are buttons for Import Orders, Orders Features, and a toolbar with buttons for ORDER DETAILS, START RECURRING, STOP RECURRING, RESET RECURRING, BLACKLIST ORDERS, EXPORT CSV, and DELETE ORDERS. At the bottom, there is a detailed table view of orders with columns for Order ID, Date/Time Stamp, Customer Name, Customer Email, Product Name, Amount, Qty, Campaign Name (ID), Shipping Type, Next Recurring Date, Next Recurring Product, and Status.

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.

The screenshot shows a configuration page for a sticky.io service. At the top, there are tabs for 'Merchant Tools', 'Administration', 'Storefront', and 'Toolkit'. On the left, there's a sidebar with a 'sticky.io' icon and a 'RefArch' dropdown. The main content area has several sections with dropdown menus and checkboxes:

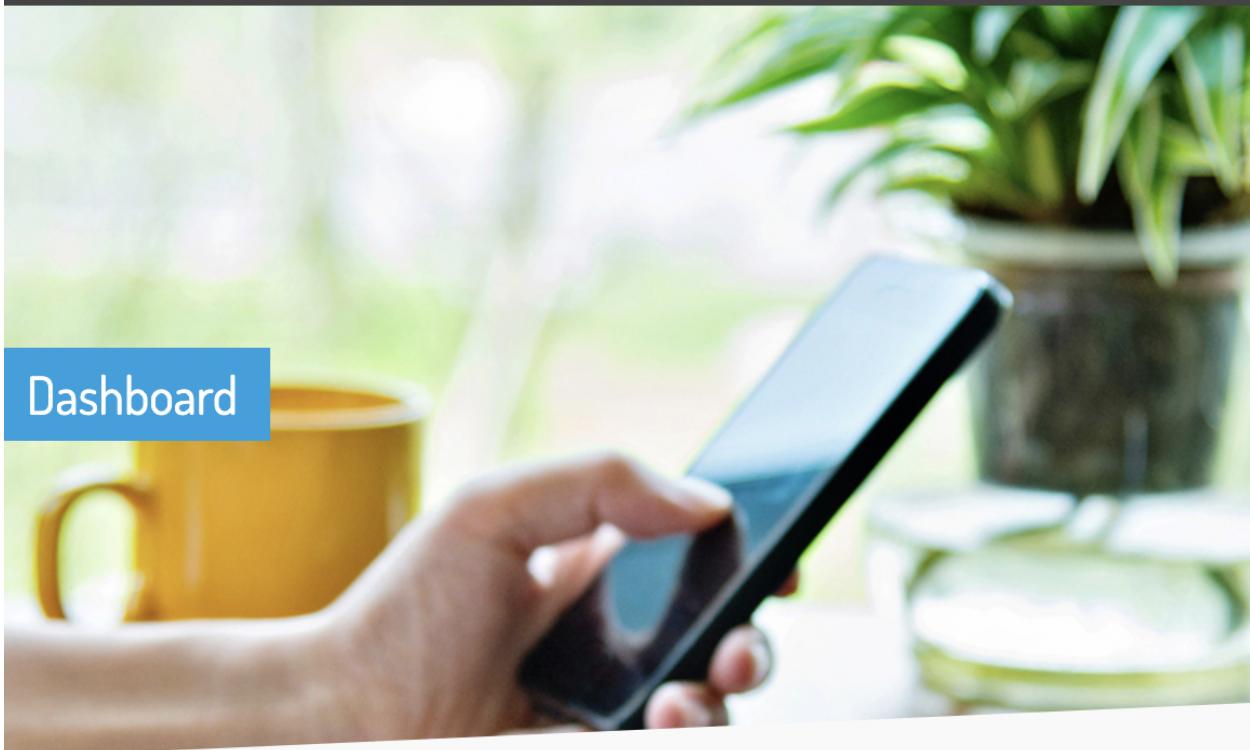
- Sandbox - sticky.io RefArch**
- Force Registered Checkout**: A dropdown menu with 'None' selected, labeled 'Require customers to log in before being able to check out with subscription items.' An 'Edit Across Sites' button is to the right.
- Allow Recurring Date Management**: A dropdown menu with 'None' selected, labeled 'Allow the consumer to manage the recurring date of their subscription.' An 'Edit Across Sites' button is to the right.
- Allow Billing Model Update**: A dropdown menu with 'None' selected, labeled 'Allow the consumer to change the billing model of their subscription.' An 'Edit Across Sites' button is to the right.
- Allow Pause**: A dropdown menu with 'None' selected, labeled 'Allow the consumer to pause their subscription.' An 'Edit Across Sites' button is to the right.
- Allow Terminate Next**: A dropdown menu with 'None' selected, labeled 'Allow the consumer to stop their subscription after the next rebill.' An 'Edit Across Sites' button is to the right.
- Allow Reset**: A dropdown menu with 'None' selected, labeled 'Allow the consumer to reset their subscription.' An 'Edit Across Sites' button is to the right.
- Allow Bill Now**: A dropdown menu with 'None' selected, labeled 'Allow the consumer to be billed "now" for their subscription.' An 'Edit Across Sites' button is to the right.

At the top right, there are navigation links for 'Edit Across Sites', a page number '1-13 of 13', and user information 'Admin Admin'.

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 templates (development experience required) located at: `int_stickyio_sfra/cartridge/templates/default/account/subscription`

New Arrivals ▾ Womens ▾ Mens ▾ Electronics ▾ Top Sellers

## Dashboard

[Home](#)

### Profile

[Edit](#)

First Name  
sticky.io

Last Name  
Customer

Email  
me@customer.com

Phone  
1234567890

### Subscriptions

[View](#)

### Order History

[View](#)

#### Most Recent Order



Order Number: 00003203

Date Ordered: 6/3/21

Order Status: NEW

Shipped to: sticky.io Customer

### Password

[Edit](#)

Password  
\*\*\*\*\*

### Address Book

[Add New](#)

Total items

1

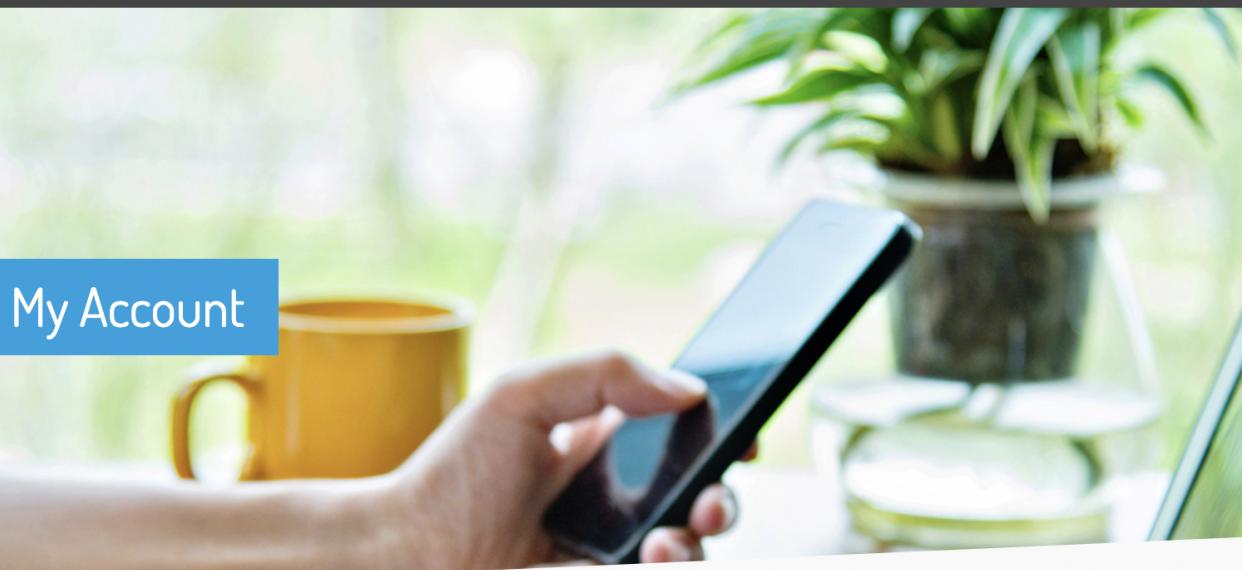
Total

\$325.48

### Payment

[Add New](#)

New Arrivals ▾ Womens ▾ Mens ▾ Electronics ▾ Top Sellers



## My Account

[Home](#) / [My Account](#)

### Subscriptions

Last Six Months

Order No. 00003203

[Manage](#)

Product: Charcoal Single Pleat Striped  
Wool Suit  
Next Shipment: 2022-06-02  
Status: Active  
Shipped to: sticky.io Customer

Order No. 00003202



Product: Charcoal Single Pleat Striped  
Wool Suit  
Status: Complete

The screenshot shows a storefront interface for a commerce platform. At the top, there's a header with the sticky.io logo, the Salesforce commerce cloud logo, a search bar, and a shopping cart icon with a notification count of 0. Below the header, a navigation bar includes links for New Arrivals, Womens, Mens, Electronics, and Top Sellers. The main content area features a large image of a person holding a smartphone next to a yellow mug on a windowsill, with green plants in the background. A blue overlay box on the left side of the image contains the word "Subscription". Below the image, the breadcrumb navigation shows Home / My Account / Subscriptions. The main product card displays a Charcoal Single Pleat Striped Wool Suit, with a "Subscription Management" dropdown menu. To the right of the product image, shipping information is listed: Shipped to: sticky.io Customer, Status: Active, Subscription: Annually, and Next Shipment: 2022-06-02. There's also a link to "Click date to change". At the bottom of the card, the word "Subscriptions" is visible.

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.
- sticky.io Offer Trial configurations are not currently supported.

## 7. Release History

Version	Date	Changes
20.1.0	2020-02-13	Initial release
21.1.0	2021-03-19	Version 2