



Version 22.5.0



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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 5.3.0 and it is compatible with version 6.1.

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 20.2 (Compatibility mode 18.10+)

Built and tested against SFRA 5.3 and 6.1

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, there is a section for 'HTTP Hostname' and 'HTTPS Hostname'. 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, there 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:

[Settings](#)[Cache](#)[Hostnames](#)

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:	<input type="text"/>
HTTPS Hostname:	<input type="text"/>
Instance Type:	All
Cartridges:	<input type="text"/> bm_stickyio:bm_app_storefront_base
Effective Cartridge Path:	app_business_manager:plugin_apple_pay:plugin_facebook:plugin_pinterest_commerce:plugin_web_payments:bc_impe:bc_search:bc_analytics:bc_transaction:bc_catalog:bc_content:

Metadata Import

Import sticky.io Metadata, Services, and Job Schedules:

1. Zip the *site_import* folder within the cartridge using a command-line tool
2. Navigate to *Administration > Site Development > Site Import & Export*
3. Select the *site-import.zip* file, created in step 1, 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 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
sticky.io Email Prior Days Sync	The job will sync the site preference prior day data from SFCC to stickyio. This job reads the site preference, Reminder Email Days out; formats the data into a comma separated string and sends it to stickyIO using the service stickyio.http.put.vas.

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
stickyio.http.get.product_groups	stickyio.http.get.v2
stickyio.http.post.subscription_order_update	stickyio.http.post.v1
stickyio.http.get.subscriptions	stickyio.http.get.v2
stickyio.http.post.images	stickyio.http.post.v2
stickyio.http.put.products.images	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:	
Password:	

[Apply](#) [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
Sticky Client ID	Provided by sticky.io
Sticky Client Password	Provided by sticky.io
Gateway ID	Provided by sticky.io
Kount Merchant ID	Provided by sticky.io

Cancel Email Enabled	Send customer email if the subscription is canceled.
Decline Email Enabled	Send customer email if rebill is declined.
Expired Card Email Enabled	Send customer email if the credit card associated with the subscription is expired.
Pause Email Enabled	Send customer email if subscription is paused
Reminder Email Enabled	Send customer subscription reminder email.
Reminder Email Days out	Prior number of Days to send reminder email notifications (1 day out, 5 days out, 15 days out)
Force Registered Checkout	Requires 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.
Enable Product Swap	Create groups of products allowed to be swapped.

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 with a sidebar on the left containing 'Account Information', 'Account Details', 'Password', 'User', 'API Client', and 'Organization'. The main 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.' Below this are three filter dropdowns: 'Filter by organization: YOUR ORGANIZATION', 'Filter by role: All', and 'Filter by status: Default (non-deleted)'. A blue 'Add User' button is located in the top right corner of the main area.

Click the “Add User” button.

The screenshot shows the 'Add User' form. The sidebar on the left includes 'Account Information', 'Account Details', 'Password', 'User', 'API Client', and 'Organization'. The main form area has a title 'Add User' and a sub-instruction 'Create a new user account or add an existing account to YOUR ORGANIZATION organization.'. It features an 'Email Address *' input field with a red asterisk indicating it's required. A large orange error message box contains the text 'Please fill out all required fields.' At the bottom 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:

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 configuration interface with two dropdown menus at the top: "Select Type: Shop" and "Select Context: Global (organization-wide)". Below these is a large text area containing a JSON object:

```
{
  "_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.

sticky.io payment method needs to be marked as **Payment Subscription Enabled** under Merchant Tools → Ordering → Payment Methods.

Payment methods that are not marked as Payment Subscription Enabled will not be displayed as a payment option if consumers' shopping cart has a subscription product in it.

Note: CREDIT_CARD is the only supported payment with this version and now and must be enabled.

The screenshot shows the Merchant Tools interface for managing payment methods. It includes three main sections:

- Payment Methods:** A table listing various payment methods with their names and descriptions. The table includes columns for ID, Name, and a remove icon. Methods listed include BANK_TRANSFER, BML, CREDIT_CARD, DW_ANDROID_PAY, DW_APPLE_PAY, GIFT_CERTIFICATE, PayPal, and sticky.io.
- CREDIT_CARD Details:** A section for configuring credit/debit card settings. It features four input fields for currency conversion rates: + (to), € (to), ¥ (to), and \$ (to). Below this is a table titled "Credit/Debit Cards:" showing a list of card types with their names: Master Card, Visa, American Express, MasterCard, Discover, and Diners Club International.
- Subscription Settings:** A section where the "Payment Subscription Enabled" checkbox is checked. A red arrow points to this checkbox, indicating it needs to be selected.

Transactional Email Notifications

The **int_stickyio_sfra** Cartridge includes out-of-the-box email templates listed below. Email templates are created in SFCC cartridge.

- Subscription Reminder
- Cancellation Confirmation
- Rebill Decline Notification
- Pause Confirmation
- Expired Card Notification

Transactional email notification settings are listed under the sticky.io preferences.

The screenshot shows a configuration page for sticky.io email notifications. It lists several settings with their current values and default values. Most settings have an "Edit Across Sites" link.

Name	Value	Default Value	
Cancel Email Enabled (stickyioCancelEmailEnabled)	Yes	Yes	Edit Across Sites
Send customer email if subscription is canceled.	Send customer email if subscription is canceled.		
Decline Email Enabled (stickyioDeclineEmailEnabled)	Yes	Yes	Edit Across Sites
Send customer email if rebill is declined.			
Expired Card Email Enabled (stickyioExpiredCardEmailEnabled)	Yes	Yes	Edit Across Sites
Send customer email if credit card associated with subscription is expired			
Reminder Email Enabled (stickyioReminderEmailEnabled)	Yes	Yes	Edit Across Sites
Send customer subscription reminder email.			

A sticky.io representative must enable an account for the Merchant, during which the Merchant will be provided a Sticky Client Id (stickyClientId) and Sticky Client Password (stickyClientPass), these must be added to sticky.io services within the Business Manager. Both pieces of information are required to use transactional email notifications.

The screenshot shows a configuration page for sticky.io client credentials. It lists two settings with their current values and default values. Both have an "Edit Across Sites" link.

Name	Value	Default Value	
stickyClientID (stickyioClientId) (String)	dccf4d37-355e-4c32-bbdc-0b9d41ddc10e		Edit Across Sites
Used as part of authorization for Sticky notifications			
Sticky Client Password (stickyioClientPass) (String)	limelight123		Edit Across Sites
Used as part of authorization for Sticky Notifications			

Email templates can be found under the templates folder of `int_stickyio_sfra`
`(int_stickyio_sfra/cartridge/templates/default/stickyio/email)`

- `stickySubscriptionCancel.isml`
- `stickySubscriptionExpiredCard.isml`
- `stickySubscriptionOutStock.isml`
- `stickySubscriptionPause.isml`
- `stickySubscriptionRebillDecline.isml`
- `stickySubscriptionReminder.isml`

Email helper class can be found under the scripts folder of `int_stickyio_sfra`. Sticky.io calls this controller when an email event happens. Customers can either update the `isml` files or change the template names within the controller to use their own templates.

`(cartridges/int_stickyio_sfra/cartridge/scripts/helpers/emailHelpers.js)`

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

Sticky.io Help Center

- [Overview of the sticky.io Cartridge for Salesforce Commerce Cloud \(SFCC\)](#)
- [sticky.io for Salesforce Commerce Cloud \(SFCC\) Onboarding 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.

The screenshot shows the sticky.io Business Manager interface. At the top, there is a navigation bar with tabs for 'Merchant Tools' (selected), 'Administration', 'Storefront', and 'Toolkit'. Below the navigation bar, the page title is 'Beautifully P...'. The main content area is titled 'sticky.io Subscription Management'. It displays a grid of eight modules, each with a blue circular icon and a link to its configuration page:

Module	Description
Offer Configuration	Offer Configuration
Billing Model Configuration	Billing Model Configuration
Subscription Order Management	Subscription Order Management
Subscription Analytics	Subscription Analytics
Product Groups	Product Swap Configuration
Multi-Currency Settings	Multi-Currency Settings
Order Note Templates	Order Note Templates
Preferences	Preferences

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*):

Orders

Search Order History

From: [] Tracking #: [] Customer ID: [CSV of IDs] City: [] Affiliate ID: [] Hold Type: []
To: [] Shipping: [] Gateway ID: [CSV of IDs] ZIP: [] Sub-Affiliate ID: [] Promo Code: []
Order ID: [CSV of IDs] Shipped Status: [] First Name: [] Phone: [] Confirm Status: [] Offer ID: [CSV of IDs]
Campaign ID: [CSV of IDs] Payment Type: [] Last Name: [] State: [] RMA #: [] Billing Model ID: [CSV of IDs]
Transaction ID: [] Status: [] Email: [] Country: [] Billing Cycle: []
Product ID: [CSV of IDs] CC First Six: [] Address: [] IP: [] Routing/Account#: []
Upsell ID: [CSV of IDs] CC Last Four: [] Address 2: [] Test Order: [] Gift Order: []

Import Orders for: [Tracking] Select File: []

Orders Features:

Approved	All	Hold	Cancellations	Subscriptions	Pending	Declines	Void/Refund	Shipped	Fraud	Chargeback	Return	Bad Shipping Address	Deleted
<input type="checkbox"/>	Order ID	Date/Time Stamp	Customer Name	Customer Email	Product Name	Amount	Qty	Campaign Name (ID)	Shipping Type	Next Recurring Date	Next Recurring Product	Status	

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

Offers

Active | Archived

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*):

Billing Models

Active | Archived

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.

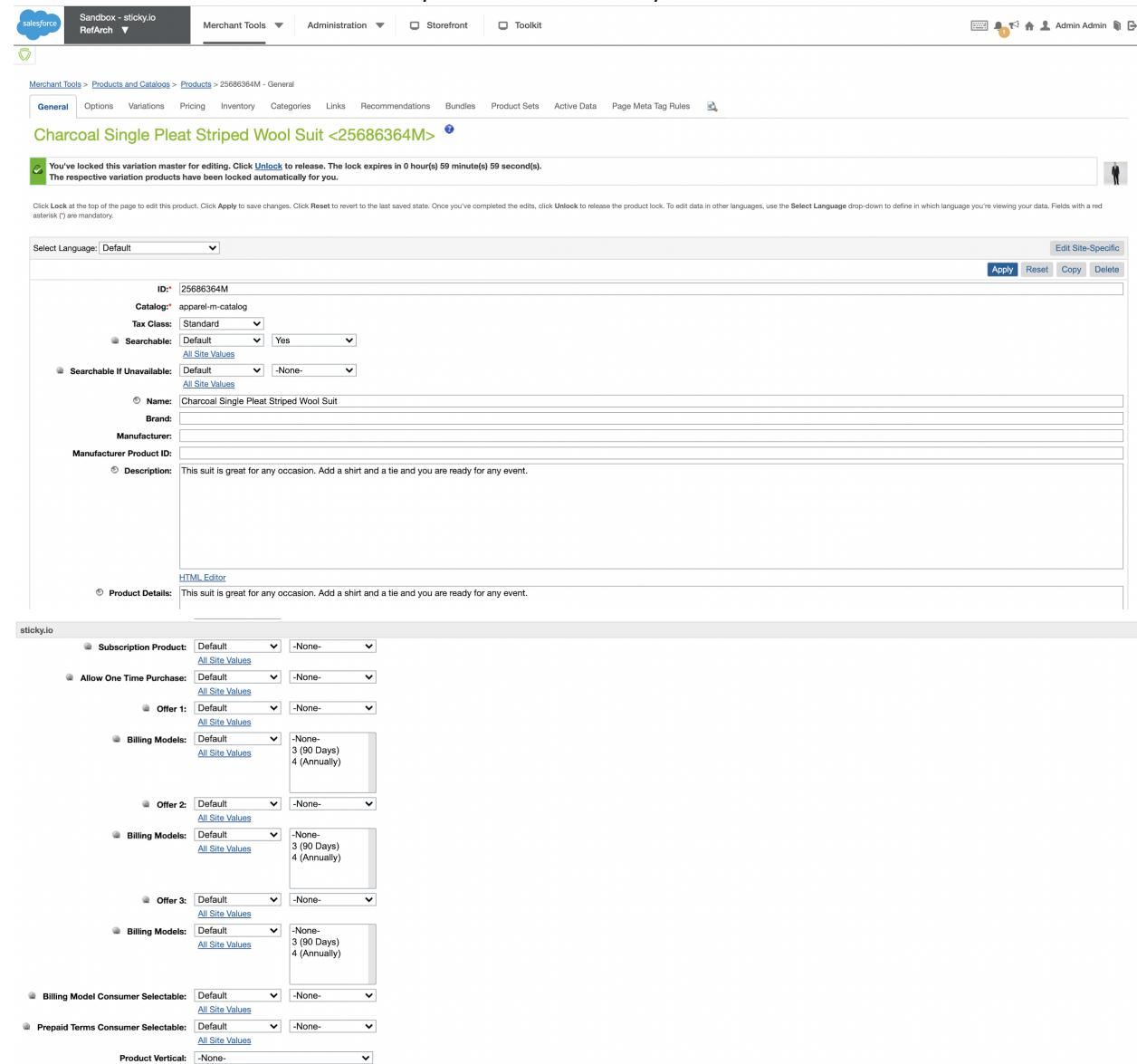
Once Offers and Billing Models are established, navigate to a product in Business Manager for which you'd like to have subscription services enabled. Stand-alone Products, Master Products, and Product Sets may have subscriptions enabled.

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 Business Manager interface with the following details:

- Header:** Salesforce, Sandbox - sticky.io RefArch, Merchant Tools, Administration, Storefront, Toolkit, Admin Admin.
- Breadcrumbs:** Merchant Tools > Products and Catalogs > Products > 25686364M - General.
- Section Headers:** General, Options, Variations, Pricing, Inventory, Categories, Links, Recommendations, Bundles, Product Sets, Active Data, Page Meta Tag Rules.
- Message Bar:** 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.
- Product Information:** Charcoal Single Pleat Striped Wool Suit <25686364M>
- Form Fields (General Section):**
 - 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:
 - Manufacturer:
 - Manufacturer Product ID:
 - Description: This suit is great for any occasion. Add a shirt and a tie and you are ready for any event.
- Buttons:** Apply, Reset, Copy, Delete.
- sticky.io Section:** This section contains configuration for Offers and Billing Models.
 - 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 sticky.io product. It includes dropdown menus for 'Subscription Product' (Default), 'Allow One Time Purchase' (Yes), 'Offer 1' (1 Standard), 'Billing Models' (Default, 3 (90 Days), 4 (Annually)), 'Offer 2' (2 (Prepaid Offer)), 'Billing Models' (Default, 3 (90 Days), 4 (Annually)), 'Offer 3' (-None-), 'Billing Models' (Default, -None-, 3 (90 Days), 4 (Annually)), 'Billing Model Consumer Selectable' (Yes), 'Prepaid Terms Consumer Selectable' (Yes), and 'Product Vertical' (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 interface under the 'Jobs' tab. The top navigation bar includes links for 'Sandbox - sticky.io RefArch', 'Merchant Tools', 'Administration', 'Storefront', 'Toolkit', and user information ('Admin Admin'). Below the navigation is a search bar ('Search by IDs...') and a 'New Job' button. A toolbar below the search bar includes buttons for 'Enable', 'Disable', 'Run', 'Delete', 'Priority', and 'Refresh'. The main area displays a table of jobs:

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

At the bottom of the page, there is a footer note: © 2020 salesforce.com, inc. All Rights Reserved. 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 creating a new promotion. The page title is "Prepaid Offer 20 Percent". The "General" tab is selected, showing the following details:

- 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:** (empty field)
- Image:** (empty field)

The "Compatibility" section includes the following settings:

- Exclusivity:** NO (Can be combined with any promotion.)
- Exclusivity Group:** (empty field)
- Combinable Promotions:** (empty field)
- Mutually Exclusive Promotions:** (empty field)

At the bottom right of the form are buttons for **Apply**, **Copy**, and **Delete**.

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

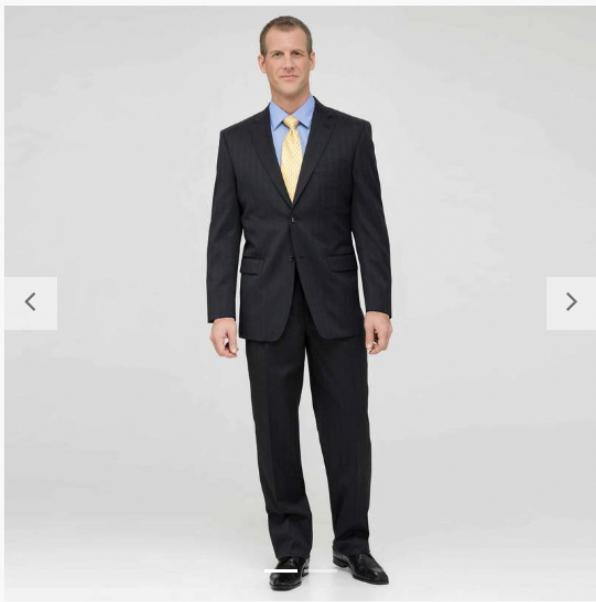
Campaign Continuously Everyone **Save** **Cancel**

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 Admin Admin

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!

Promotion Details: 50% Off if you purchase annually!

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: Exclusivity Group:
 Combinable Promotions:
 Mutually Exclusive Promotions:

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.

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

Promotion Class: Product With Amount of Qualifying Products

Discount: Buy or More and Get 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 Shipping Methods change, please run the **sticky.io Shipping Methods Update** job to sync changes with sticky.io.

If your Reminder Email Prior Days change, please run the **sticky.io Email Prior Days** 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, New Arrivals, Womens, Mens, Electronics, and Top Sellers. The search bar contains the placeholder "Search (keywords, etc)". The shopping cart icon shows 0 items. The main content area features a large image of a man wearing the suit, with left and right arrows for navigation. To the right of the image, the product title "Charcoal Single Pleat Striped Wool Suit" is displayed, along with its item number "Item No. 25686364M" and a five-star rating. Below the title, there are dropdown menus for "Select Color" (with a checked option), "Select Size", "Select Width", and "Quantity" (set to 1). There are also sections for "Subscription Period" (radio buttons for "One-time Purchase, No Subscription", "Standard", and "Prepaid Offer"), and dropdown menus for "Select a subscription period" and "Select subscription terms". At the bottom, there are buttons for "Availability: Select Styles for Availability", a price range from "\$500.00" to "\$299.99", and an "Add to Cart" button. Social sharing icons for Pinterest, Facebook, Twitter, and LinkedIn are also present.

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**

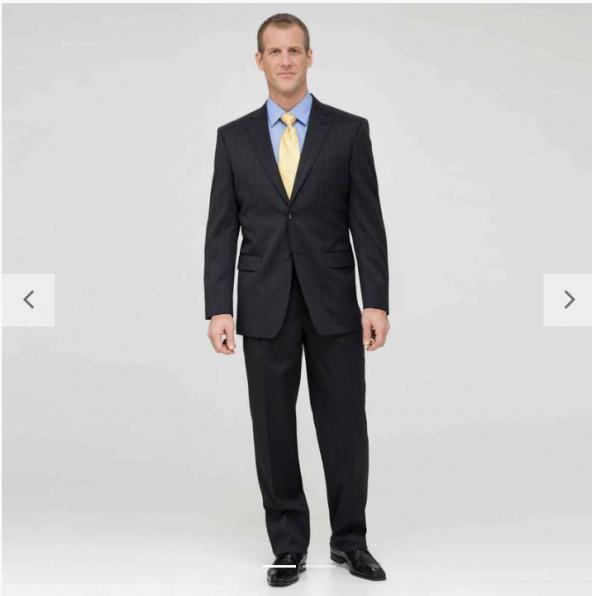
Notice for a Master Product, Subscription Period is disabled. It will enable once an available variation is picked.
 Pick the Subscription Period.

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

[Login](#)

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

36

Select Width

Short

Quantity

1

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

Add to Cart



Notice the minicart.

▪ Login ▾

 salesforce commerce cloud

New Arrivals ▾ Womens ▾ Mens ▾ Electronics ▾ Top Sellers

Your shopping cart [View Cart](#)

Charcoal Single Pleat Striped Wool Suit X

	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

Mens / Clothing / S

Charcoal Si Suit

Item No. 640188016204

Select Color ▼

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
Width: Short
Subscription: Annual
Subscription
In Stock
[Edit](#)

Each
\$500.00
\$299.99

Quantity
1
Total
\$299.99

Enter Promo Code

Shipping

Ground (7-10 Business Days)

Shipping cost \$9.99

Sales Tax \$15.50

Estimated Total \$325.48

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

FREE 2-Day SHIPPING FOR ORDERS OVER \$300

[Login](#)
[New Arrivals](#) ▾

Your C

[Continue Shop](#)
[Charcoal Si](#)


Charcoal Single Pleat Striped Wool Suit

Select Color



Select Size

36

Select Width

Short

Subscription Period:

One-time Purchase, No Subscription

Standard

Annually

Prepaid Offer

Select a subscription period

Select subscription terms

[Locate Store](#)

The Store Locator
you find the closest

Availability: In Stock

Quantity

1

\$500.00 \$299.99

[Site Map](#)
[Jobs](#)

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	\$299.99

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 view displays "Details for Order '00000605'". The "Information" section contains general order details: Date Received: 3/26/21 5:10:22 pm Etc/UTC, Site: RefArch, Created By: Customer, Customer: sticky.io, Customer No.: 00000004, IP Address: 127.0.0.1, Email: product@sticky.io, Phone: 123-123-1234. The "Order Status" is Open and the "Shipping Status" is Not Shipped. The "Confirmation Status" is Confirmed and the "Export Status" is Ready for Export. The "Shipment 00002501" table lists items: Qty 1, Product ID 640188016204M, Name Charcoal Single Pleat Striped Wool Suit Adjustment Prepaid Offer \$500 Off, Manufacturer n/a, Tax Rate 5.00 %, Unit Sales Price \$1,499.95, Tax Basis \$1,499.95, Item Total \$1,499.95 -\$500.00. Qty 2, Product ID 1 of Offer: Prepaid Offer, Name n/a, Tax Rate 5.00 %, Unit Sales Price \$0.00, Tax Basis \$0.00, Item Total \$0.00. Qty 3, Product ID 1 of Billing Model: 90 Days, Name n/a, Tax Rate 5.00 %, Unit Sales Price \$0.00, Tax Basis \$0.00, Item Total \$0.00. Qty 2-5, Product ID 1 of Prepaid Term: 5 cycles at \$500.00 off, Name n/a, Tax Rate 5.00 %, Unit Sales Price \$0.00, Tax Basis \$0.00, Item Total \$0.00. Summary: Shipment Shipping Cost: \$15.99, Total Shipping Cost (001): \$15.99, Shipping Total: \$15.99, Tax Total: \$56.80, Total: \$1,066.74. Buttons for Send Email and Print Order are present.

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 view displays "Orders". The search bar "Search Order History" includes fields for From, To, Order ID, Transaction ID, Product ID, Upsell ID, Tracking #, Customer ID, CSV of IDs, City, Affiliate ID, Hold Type, Promo Code, Sub-Affiliate ID, Confirm Status, Offer ID, Billing Model ID, Status, Payment Type, First Name, Last Name, Phone, State, RMA #, Billing Cycle, Country, Email, Address, IP, Routing/Account#, Address 2, Test Order, and Gift Order. Below the search bar are buttons for Import Orders for: Tracking, Select File, BROWSE, IMPORT, FORCE SHIP, and Orders Features: ORDER DETAILS, START RECURRING, STOP RECURRING, RESET RECURRING, BLACKLIST ORDERS, EXPORT CSV, and DELETE ORDERS. At the bottom is a grid of order details with columns: Approved, All, Hold, Cancellations, 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 at the bottom right shows page 1 of 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.

The screenshot shows a configuration page for a sticky.io service. At the top, there are tabs for 'Sandbox - sticky.io RefArch' (selected), 'Merchant Tools' (with dropdowns for 'Administration' and 'Storefront'), 'ToolKit', and user information ('Admin Admin'). On the right, there are icons for notifications, users, and system status.

Sandbox - sticky.io RefArch

Merchant Tools ▾ **Administration** ▾ **Storefront** **ToolKit** Admin Admin

stickyioIsOkToNotifyMerchantAboutServiceStatus (String)
Enabling or disabling this service requires communication with your sticky.io rep.

Force Registered Checkout
(stickyioForceRegisteredCheckout)
Require customers to log in before being able to check out with subscription items.

Allow Recurring Date Management
(stickyioSubManAllowRecurringDate)
Allow the consumer to manage the recurring date of their subscription

Allow Billing Model Update
(stickyioSubManAllowUpdateBilling)
Allow the consumer to change the billing model of their subscription

Allow Pause
(stickyioSubManAllowPause)
Allow the consumer to pause their subscription

Allow Terminate Next
(stickyioSubManAllowTerminateNext)
Allow the consumer to stop their subscription after the next rebill

Allow Reset
(stickyioSubManAllowReset)
Allow the consumer to reset their subscription

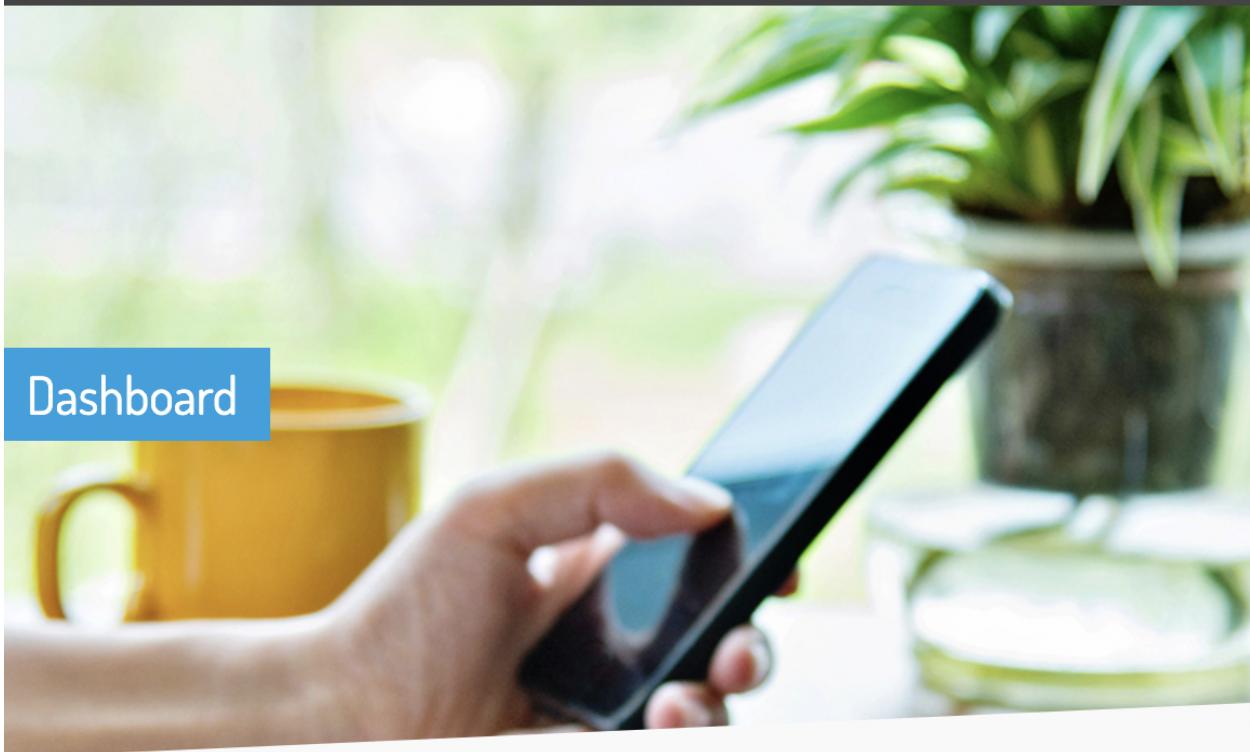
Allow Bill Now
(stickyioSubManAllowBillNow)
Allow the consumer to be billed "now" for their subscription

Edit Across Sites 1-13 of 13

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

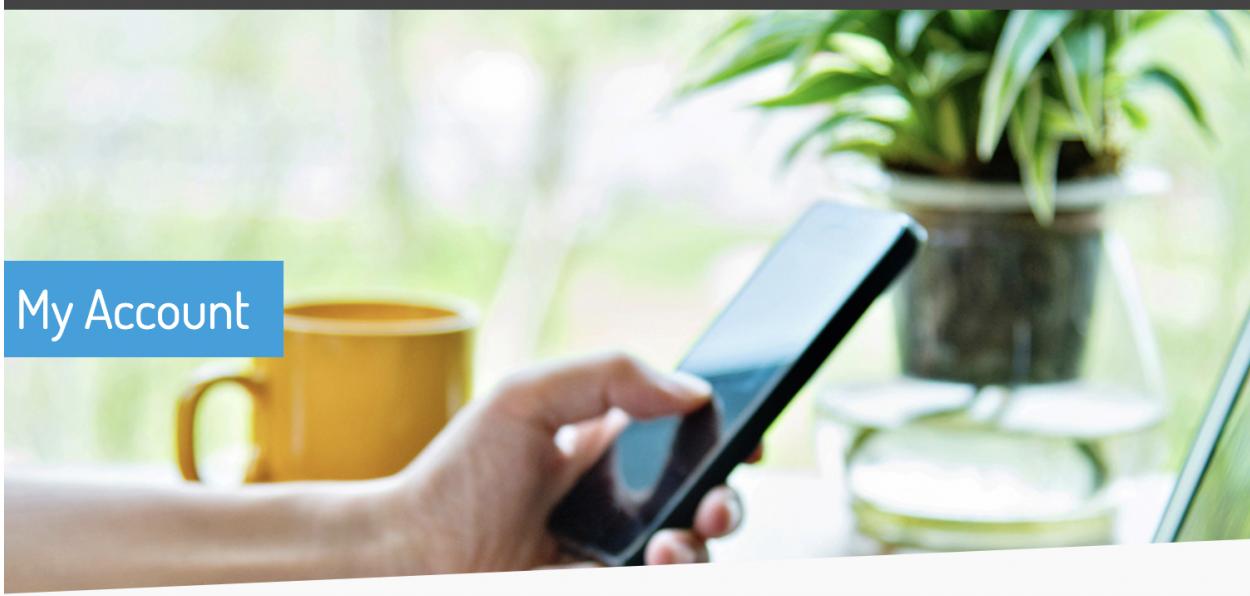
\$325.48

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

sticky.io ▾

salesforce commerce cloud

New Arrivals ▾ Womens ▾ Mens ▾ Electronics ▾ Top Sellers

Subscription

Charcoal Single Pleat Striped Wool Suit

Subscription Management ▾

Shipped to: sticky.io Customer
Status: Active
Subscription: Annually ▾
Next Shipment: 2022-06-02
Click date to change

Subscriptions

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.

Cancelation Reasons

Link to Sticky [User Guide](#).

Cancellation Reasons feature is implemented via the 22.3.0 release.

Merchant Tools > sticky.io > Order Note Templates

Mult-Currency Support

Link to Sticky [User Guide](#).

Multi-Currency feature is implemented via the 22.4.0 release. Merchant can enable Multi-Currency against SFCC Site.

Merchant Tools > sticky.io > Multi-Currency Settings. This feature is tied to Salesforce Locales. Merchant Tools > Site Preferences > Locales.

Apply to Other Sites is not supported, the merchant needs to configure these settings for each site.

Your sticky.io representative will work with you to set up a mirror of your SFCC payment processor on the sticky.io platform

The screenshot shows the 'Multi-Currency' settings page. At the top, there is a dropdown menu set to 'Enabled Yes'. Below this, a table titled 'Defined Gateways' lists three entries:

Locale	Currency	Gateway ID	Action
en_US	USD	v 1	
it_IT	EUR	v 4	
it_IT	USD	v 1	

At the bottom right of the table are 'ADD', 'CANCEL', and 'SAVE' buttons.

Product Swap

Link to Sticky User Guide.

Product Swap feature is implemented via the 22.5.0 release.

Merchant Tools > sticky.io > Product Groups

The screenshot shows the 'Product Groups' page. It displays two product groups:

Actions	Product Group Name ↑↓	# of Products ↑↓	On/Off ↑↓	Edit
<input type="checkbox"/>	Product Group #1 (Tech & Beauty Products)	5		
<input type="checkbox"/>	Beverages	0		

At the bottom left is a navigation bar with arrows and page numbers (1, 2). At the bottom right is a copyright notice: © Copyright 2008 - 2022 sticky.io All Rights Reserved. 2022.10.11.20 [492d3].

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	2021-06-21	Version 2
22.1.1	2022-03-30	Bug-fix Release
22.2.0	2022-04-15	Persona-One Release
22.2.1	2022-05-04	Persona-One Bug Fix Release
22.3.0	2022-06-02	New Feature: Cancellation Reasons
22.4.0	2022-07-11	New Feature: Multi-Currency
22.5.0	2022-10-12	New Feature: Product Swap