



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:

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

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

RefArch - Settings

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

Instance Type: Sandbox/Development

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.

HTTP Hostname:

HTTPS Hostname:

Instance Type: **All**

Cartridges:

Effective Cartridge Path:

Apply Reset

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

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

Business Manager - Settings

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

Instance Type:

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

HTTP Hostname:

HTTPS Hostname:

Instance Type: All

Cartridges:

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

Metadata Import

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

Site-specific metadata for the sticky.io Payment Method and Payment Processor 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.

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

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

Basic configurations for these jobs are included in the site import. However, the correct Sites must be configured. This configuration is located under the “Scope” section inside of the “Job Steps” tab. There are additional job parameters available within 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.put.campaigns	stickyio.http.put.v2
stickyio.http.put.offers	stickyio.http.put.v2
stickyio.http.put.products.variants	stickyio.http.put.v2
stickyio.http.put.shipping	stickyio.http.put.v2
stickyio.http.put.subscriptions.billing_model	stickyio.http.put.v2
stickyio.http.put.subscriptions.pause	stickyio.http.put.v2
stickyio.http.put.subscriptions.recur_at	stickyio.http.put.v2
stickyio.http.put.subscriptions.terminate_next	stickyio.http.put.v2

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

Custom Preferences

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

Merchant Tools > Site Preferences > Custom Preferences > STICKYIO

Merchant Tools > sticky.io > Preferences

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

Custom Preferences	
Name	Description
Enable sticky.io	Enable or disable sticky.io storefront and gateway functionality
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 Resume/Un-pause	Consumer subscription self-management: Allow the consumer to resume/un-pause a stopped subscription.
Allow Reset	Consumer subscription self-management: Allow the consumer to reset their subscription.
Allow Bill Now	Consumer subscription self-management: Allow the consumer to be billed "now" for their subscription.

Configuration

Custom Site Preferences' defaults should be sufficient for normal storefront operations. **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:

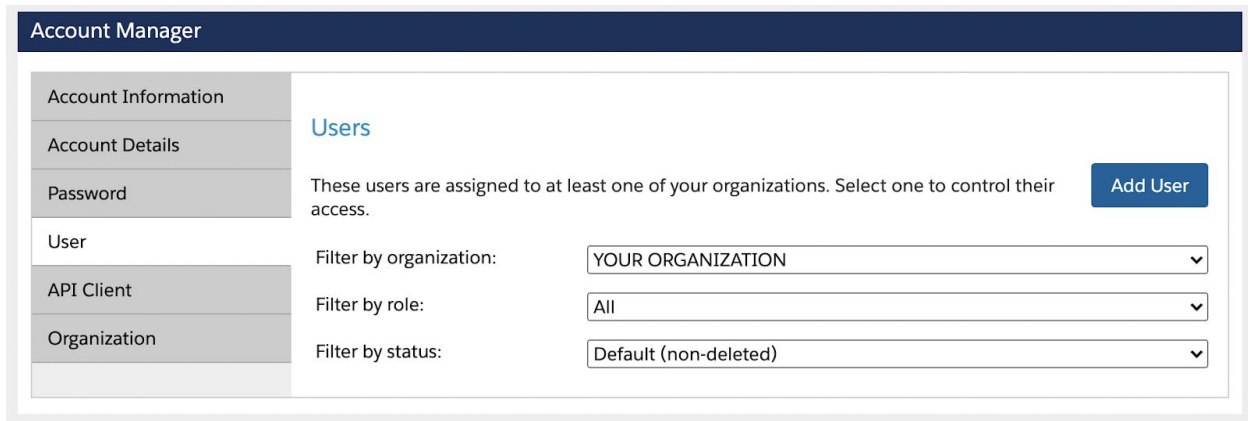
The login should be set to "sticky.io". **This user should be given Business Manager Administrator permissions for all necessary instances.** This is a required user account to enable OCAPI Business Manager access. Please set the email address of this user to *product@sticky.io*.

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.

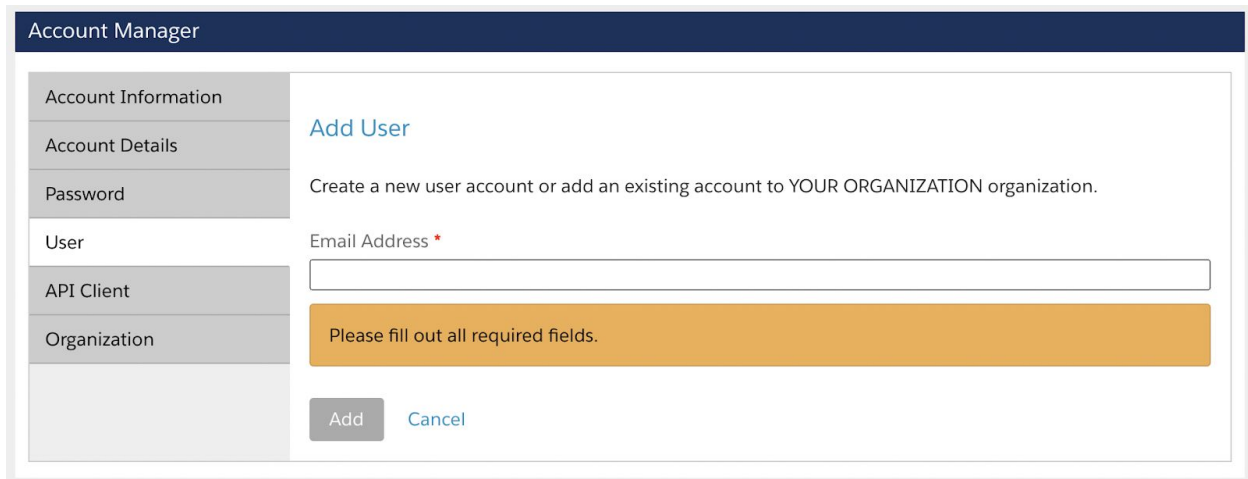
Access the Commerce Cloud Account Manager at: <https://account.demandware.com/>

Navigate to User:



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

Click the “Add User” button.



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

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

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

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

Business Manager Administrator - Filters

YOUR ORGANIZATION

Enter Name...

YOUR.ORGANIZATION.DOMAIN

☐

P

production

☐

S

staging

☐

D

development

☐

*

All Sandboxes

Cancel

Add

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

OCAPI Configuration

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

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

Click the “Add API Client” button.

Enter a Display Name of “sticky.io”.

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

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

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

Hit “Save”.

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

Leave all other options their default.

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

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

Open Commerce API Settings

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

```
{
  "_v": "19.10",
  "clients": [
    {
      "client_id": "dccc4d37-355e-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/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/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 in to SFCC from sticky.io via OCAPI trigger Order Confirmation Emails. It is up to the Merchant to implement expected functionality in terms of the appropriate template or third-party service to handle creation/delivery of this email if the default is not desired. Hook functionality exists in the `cartridge/scripts/hooks/stickyioOCAPI/order.js` afterPOST method.

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			✓
Offer Configuration	Offer Configuration		✓
Billing Model Configuration	Billing Model Configuration		✓
Subscription Management	Subscription Management		✓
Subscription Analytics	Subscription Analytics		✓
Preferences	Preferences		✓

sticky.io Subscription Management

- Offer Configuration**
Offer Configuration
- Billing Model Configuration**
Billing Model Configuration
- Subscription Management**
Subscription Management
- Subscription Analytics**
Subscription Analytics
- 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*):

sticky.io > Subscription Order Management

Orders

Search Order History

From: [] Tracking #: [] Customer ID: [] City: [] Affiliate ID: [] Hold Type: []

To: [] Shipping: [] Gateway ID: [] CSV of IDs: [] ZIP: [] Sub-Affiliate ID: [] Promo Code: []

Order ID: [] Shipped Status: [] First Name: [] Phone: [] Confirm Status: [] Offer ID: []

Campaign ID: [] Payment Type: [] Last Name: [] State: [] RMA #: [] Billing Model ID: []

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

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

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

SHOW RESULTS **CLEAR**

Import Orders for: [] Select File: [] **BROWSE** **IMPORT** **FORCE SHIP**

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

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	Status

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

Home / Products / Offers

Offers

Active | Archived

Search...

ACTIONS

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.

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

Home / Products / Billing Models

Billing Models

Active | Archived

Search...

ACTIONS

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.

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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.

Sandbox - sticky.io

RefArch

Merchant Tools

Administration

Storefront

Toolkit

Admin Admin

Merchant Tools > Products and Catalogs > Products > 25686364M - General

General

Options

Variations

Pricing

Inventory

Categories

Links

Recommendations

Bundles

Product Sets

Active Data

Page Meta Tag Rules

Charcoal Single Pleat Striped Wool Suit <25686364M>

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.

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.

Select Language: Default

Edit Site-Specific

Apply

Reset

Copy

Delete

ID: 25686364M

Catalog: apparel-in-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.

HTML Editor

Product Details: This suit is great for any occasion. Add a shirt and a tie and you are ready for any event.

sticky.io

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.

sticky.io

Subscription Product: Default Yes

Allow One Time Purchase: Default Yes

Offer 1: Default 1 (Standard)

Billing Models: Default -None- 3 (90 Days) 4 (Annually)

Offer 2: Default 2 (Prepaid Offer)

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 Yes

Prepaid Terms Consumer Selectable: Default Yes

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 `sticky.io.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.

Sandbox - sticky.io RefArch

Merchant Tools Administration Storefront Toolkit

Administration / Operations /

Jobs New Job

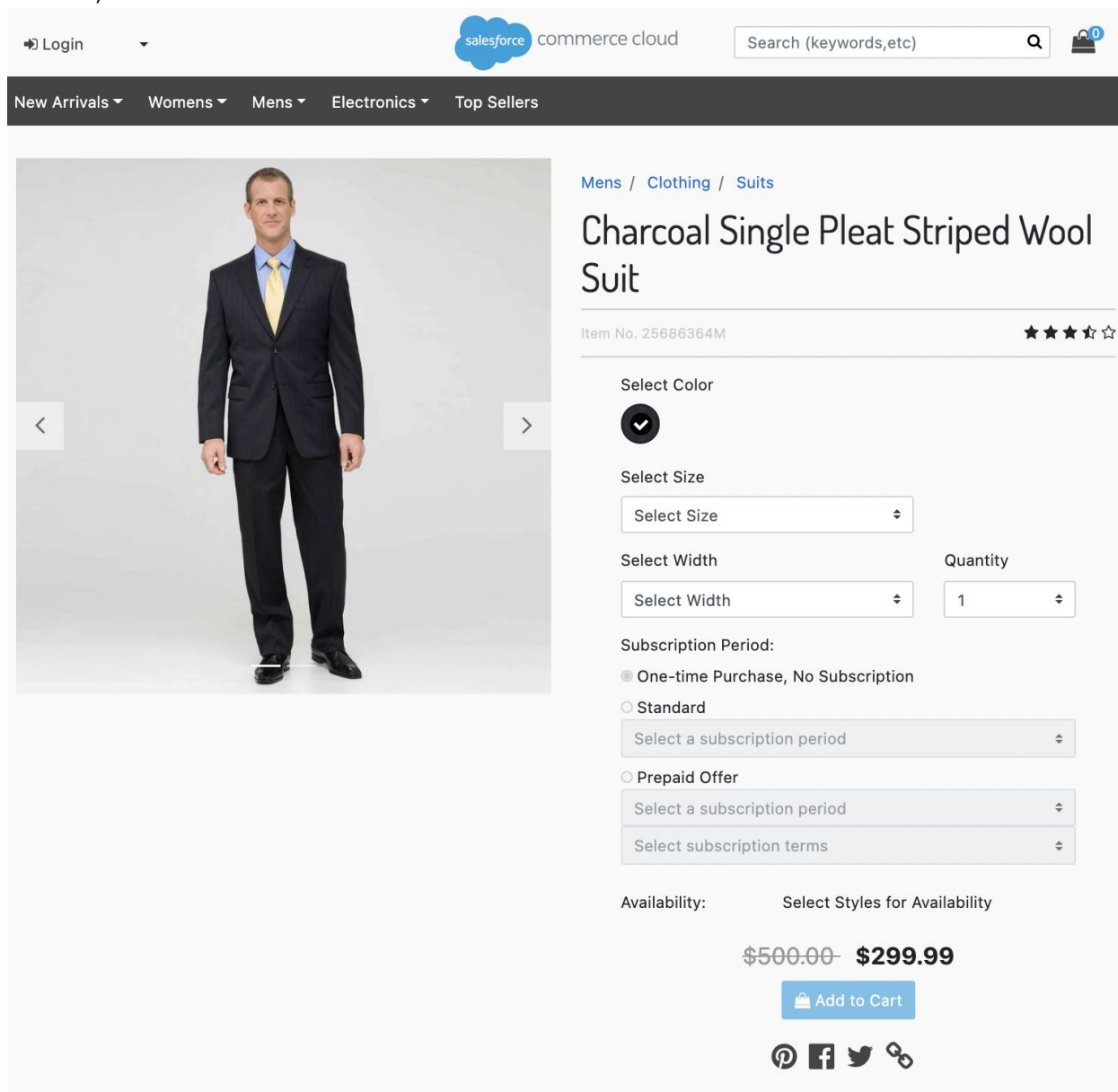
Search by IDs...

Enable Disable Run Delete Priority Refresh

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

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



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 there-of.

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

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

sticky.io extends the Product object with several custom attributes: `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*.

Promotional pricing is applied 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.

The screenshot displays the Salesforce Promotions setup page for a 'Prepaid Offer 20 Percent'. The interface is divided into several sections:

- General:** Contains fields for ID, Name, Currency, Enabled, Archived, and Searchable. It also includes a Callout Message and Promotion Details.
- Compatibility:** Includes a section for Exclusivity with a dropdown menu and checkboxes for Combinable and Mutually Exclusive Promotions.
- Promotion Rule:** This section is expanded, showing the configuration for the promotion rule. It includes an example, a discount rule (Buy 1.00 or More and Get 20 Percent Off), qualifying products, discounted products, payment methods, restrictions, maximum applications, and prorate discount options.
- Schedule/Qualifiers/Compatibility:** A table at the bottom showing the promotion's schedule and qualifiers.

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

[Add Include](#)
[Add Exclude](#)

Global product exclusions are enabled for the entire promotion.

Disable Global Product Exclusions:

Included Products 1

Qualifier	Operator	Value	Catalog
Product Option ID 'stickyioTermOptions'	equals	2-3	
Offer 1 (custom.stickyioOffer1)	equals	2 (Prepaid Offer)	

[Add](#)

Included Products 2

Qualifier	Operator	Value	Catalog
Product Option ID 'stickyioTermOptions'	equals	2-3	
Offer 2 (custom.stickyioOffer2)	equals	2 (Prepaid Offer)	

[Add](#)

Included Products 3

Qualifier	Operator	Value	Catalog
Product Option ID 'stickyioTermOptions'	equals	2-3	
Offer 3 (custom.stickyioOffer3)	equals	2 (Prepaid Offer)	

[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.

[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 ×



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

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 included in this file where the “_#” part of the localization 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.

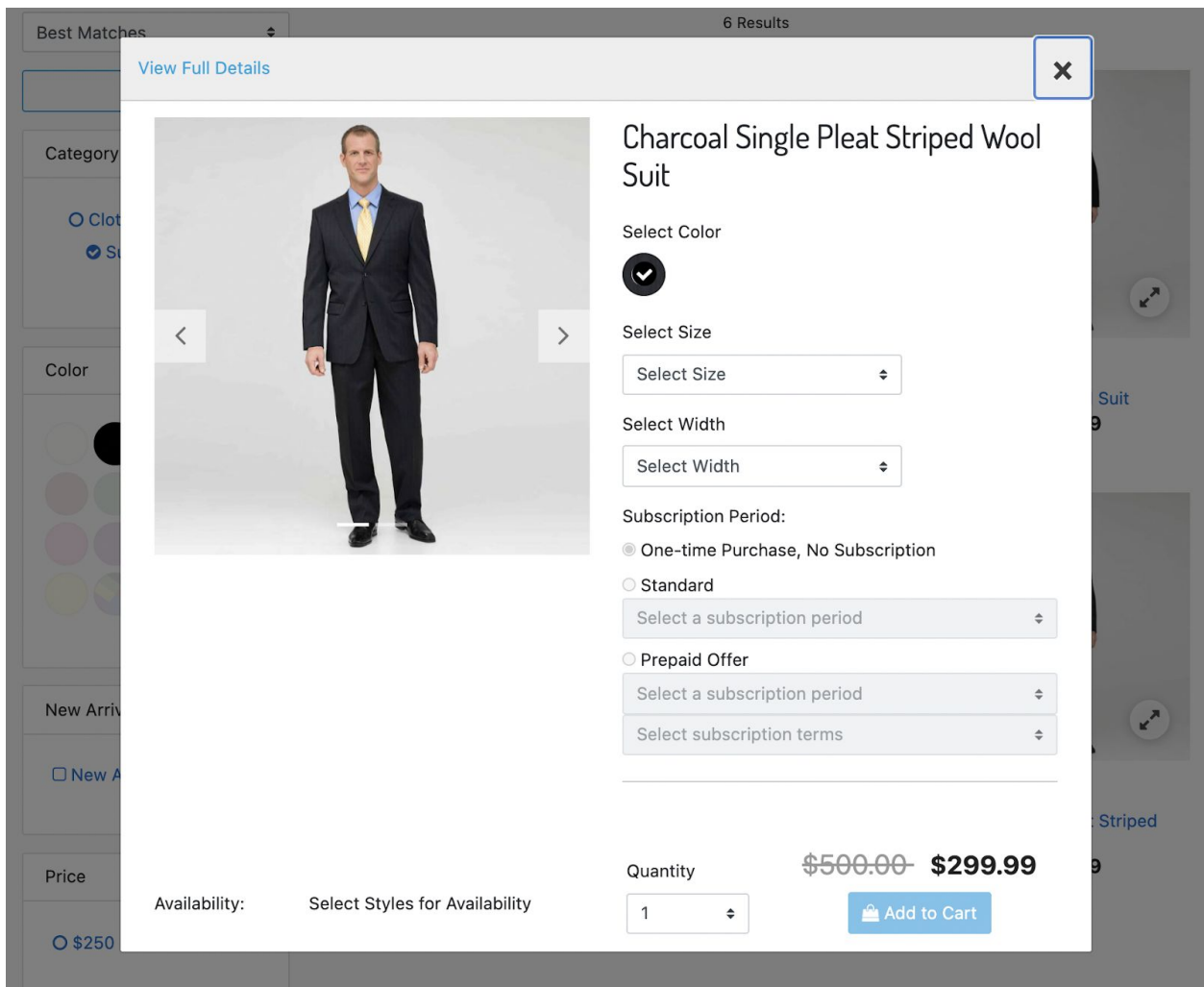
If your Shipping Methods change, please run the **sticky.io Shipping Methods Update** job to sync changes with sticky.io.

Storefront Functionality

Navigate to a subscription product.

The screenshot displays a product page for a "Charcoal Single Pleat Striped Wool Suit" on a Salesforce Commerce Cloud storefront. The page includes a navigation bar with "Login", "New Arrivals", "Womens", "Mens", "Electronics", and "Top Sellers". The product is categorized under "Mens / Clothing / Suits". The main image shows a man in the suit. To the right, there are selection options for "Select Color" (a checked circle), "Select Size" (a dropdown menu), "Select Width" (a dropdown menu), and "Quantity" (a dropdown menu set to 1). Below these are subscription options: "Subscription Period:" with radio buttons for "One-time Purchase, No Subscription", "Standard" (selected), and "Prepaid Offer". Each option has a dropdown for "Select a subscription period" or "Select subscription terms". The "Availability:" section shows "Select Styles for Availability". The price is displayed as "\$500.00" crossed out and "\$299.99" in bold. An "Add to Cart" button is present, along with social media icons for Pinterest, Facebook, Twitter, and a share icon.

Or look at a subscription product via quick view.



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)

0

New ArrivalsWomensMensElectronicsTop 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

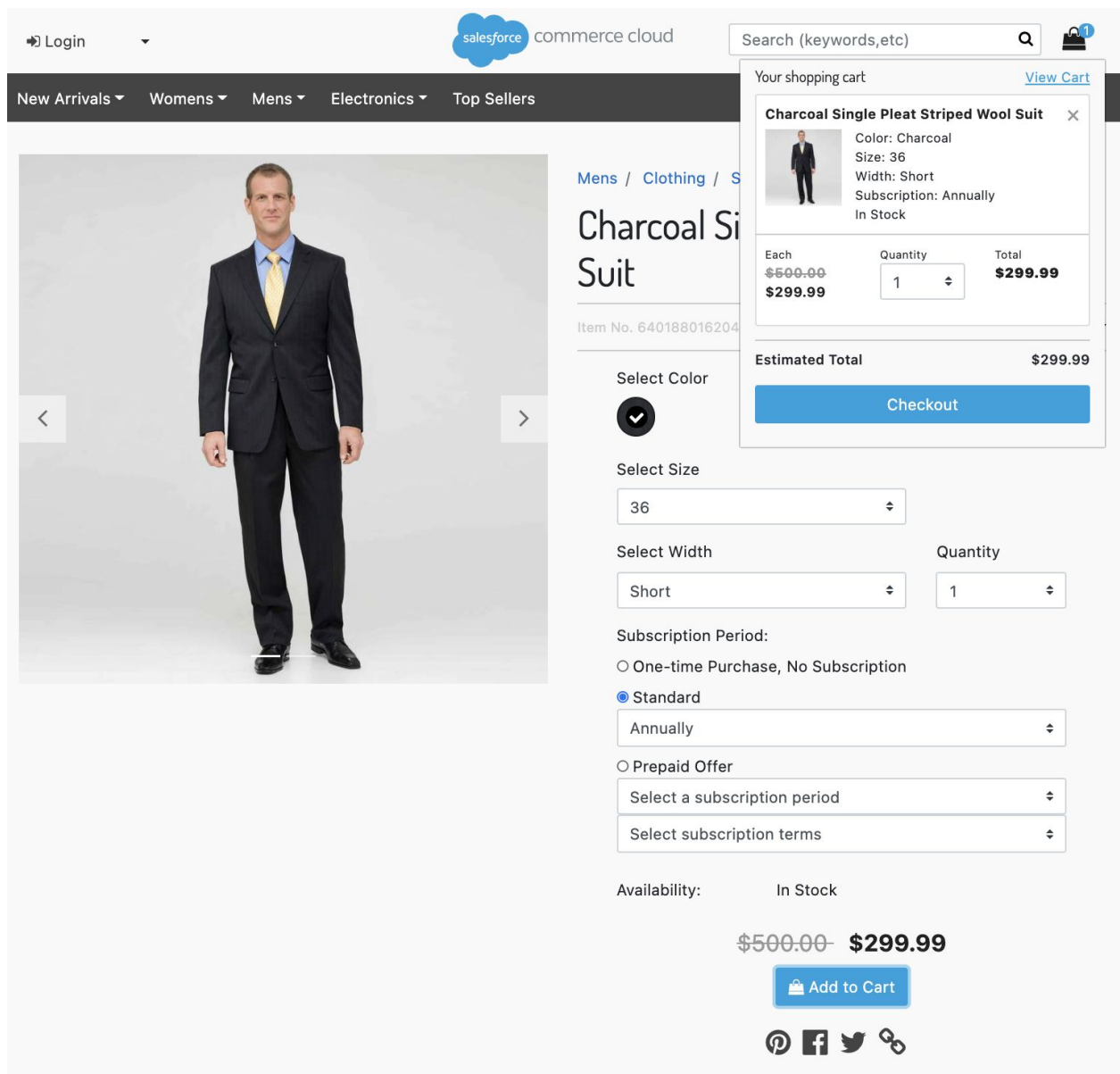
Availability: In Stock

~~\$500.00~~ **\$299.99**

Add to Cart



Notice the minicart.



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


[Login](#)
English (United States)

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

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
 In Stock
[Edit](#)

Each	Quantity	Total
\$500.00 \$299.99	1	\$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.


[Login](#)
English (United States)

[New Arrivals](#)

Your Cart

[Continue Shopping](#)

Charcoal Single Pleat Striped Wool Suit



Select Color
☒ Charcoal

Select Size
 36

Select Width
 Short

Subscription Period:
☐ One-time Purchase, No Subscription
☒ Standard
 Annually

☐ Prepaid Offer
 Select a subscription period
 Select subscription terms

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.

Checkout

salesforce commerce cloud

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 2/2021

1 Items. \$299.99

Charcoal Single Pleat Striped Wool Suit



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

Quantity	Total
1	\$299.99

Subtotal. \$299.99

Shipping. \$9.99

Sales Tax. \$15.50

Total. \$325.48

[Continue Shopping](#)

Self-Managed Subscriptions


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

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.

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

1 Items\$299.99

Charcoal Single Pleat Striped Wool Suit




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

Quantity	Total
1	\$299.99

1 Items\$299.99

Charcoal Single Pleat Striped Wool Suit



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

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

Quantity	Total
	\$299.99

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

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

6. Known Issues

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

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