

# Magento 2 Subscription & Recurring Payments User Guide

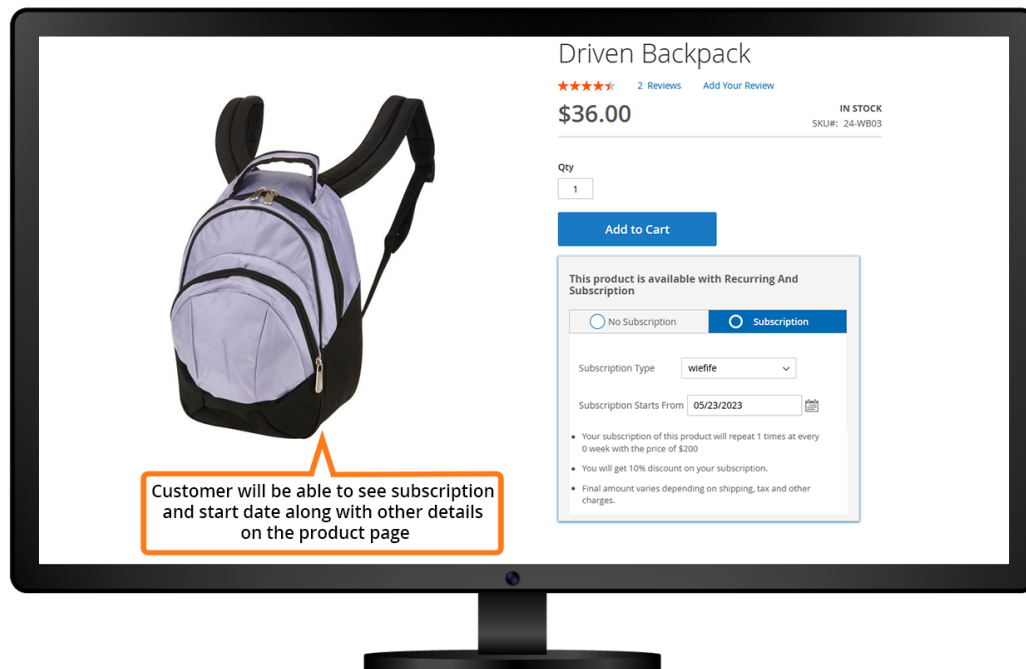
## 1. Introduction

The Auction extension for Magento 2 allows selling products with recurring payment plans. Recurring orders are renewed at regular intervals and on a timely basis.

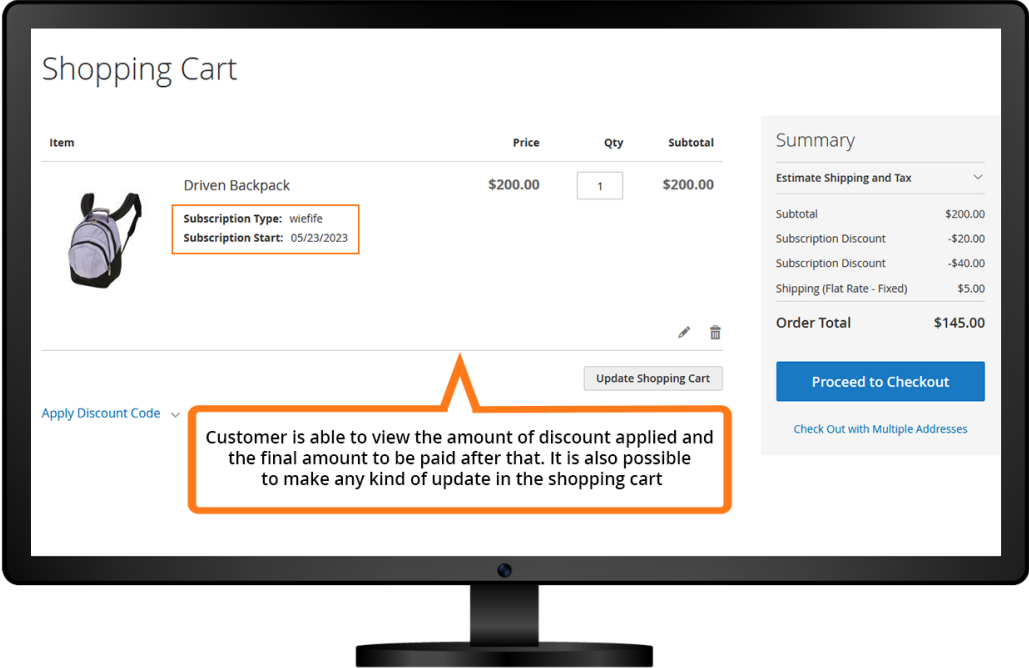
## 2. General Configuration

After buying the extension, you can configure it by navigating here through the Magento backend.

The screenshot below shows the subscription starting date along with other required details on the product page.

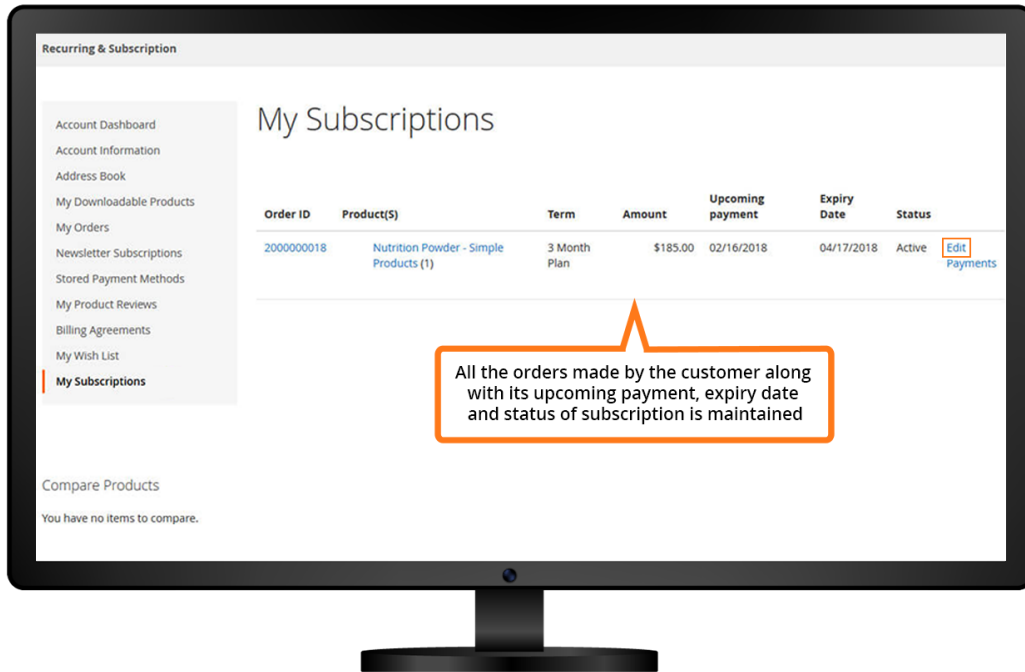


Magento 2 Subscription & Recurring Payment extension allows you to showcase the discount applied and the final amount that is required to pay. It also allows you to make the required updations in the shopping cart.

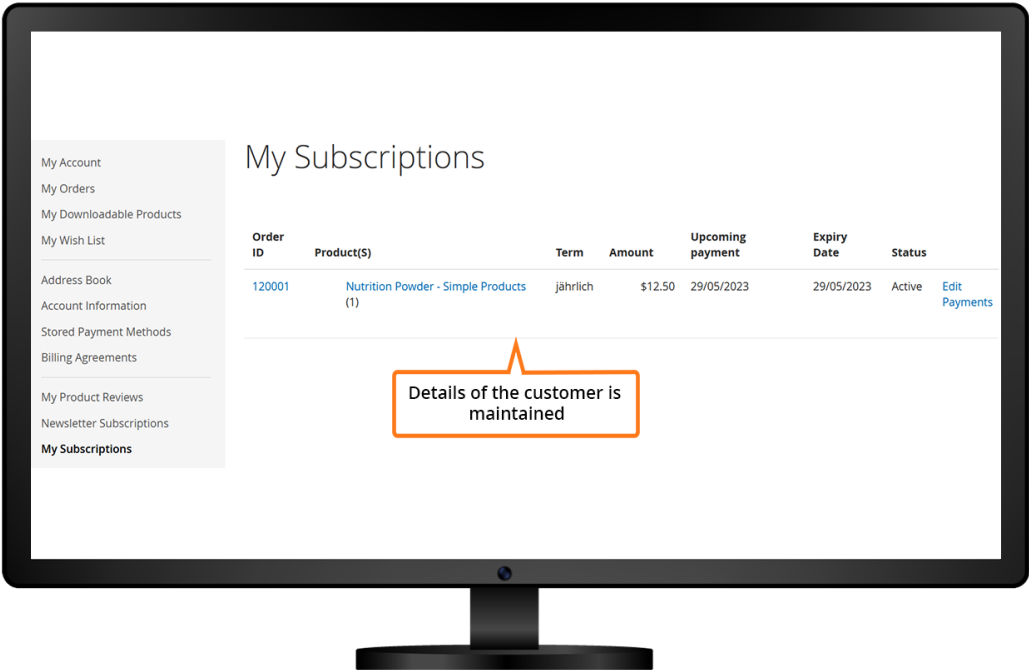


### 3. My Subscriptions

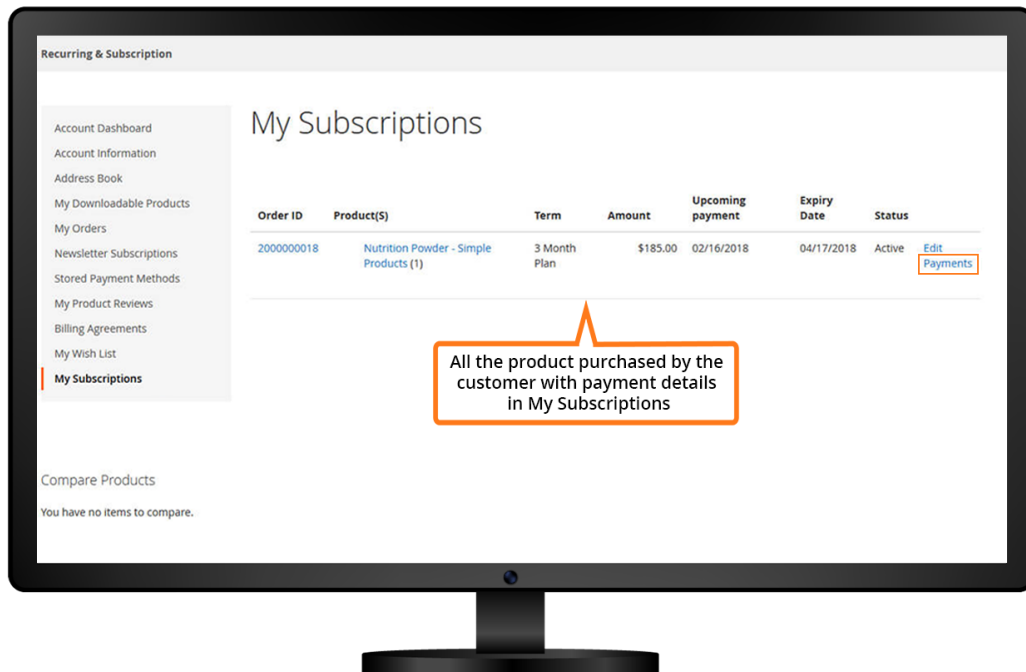
All the orders placed by the customer are listed here along with the upcoming payment, expiry date and status of subscriptions is maintained.



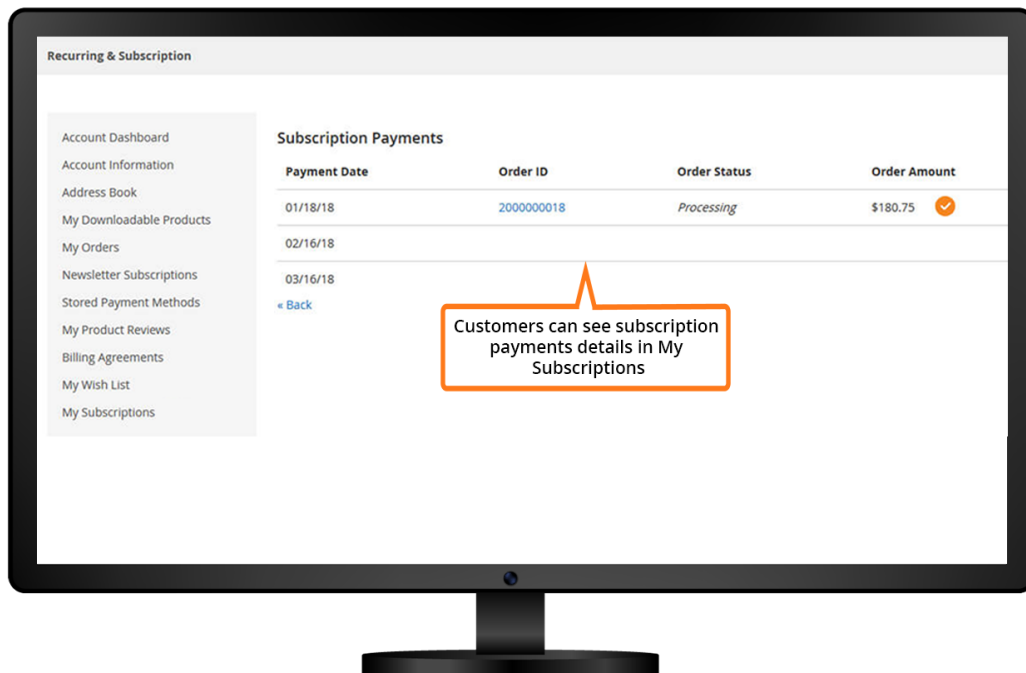
In "My Subscriptions" grid, the details of the customer is maintained.



The grid displays all the products purchased by the customer with payment details in the “My Subscriptions” tab.



The module also showcases the subscription payments details in “My Subscriptions” list.

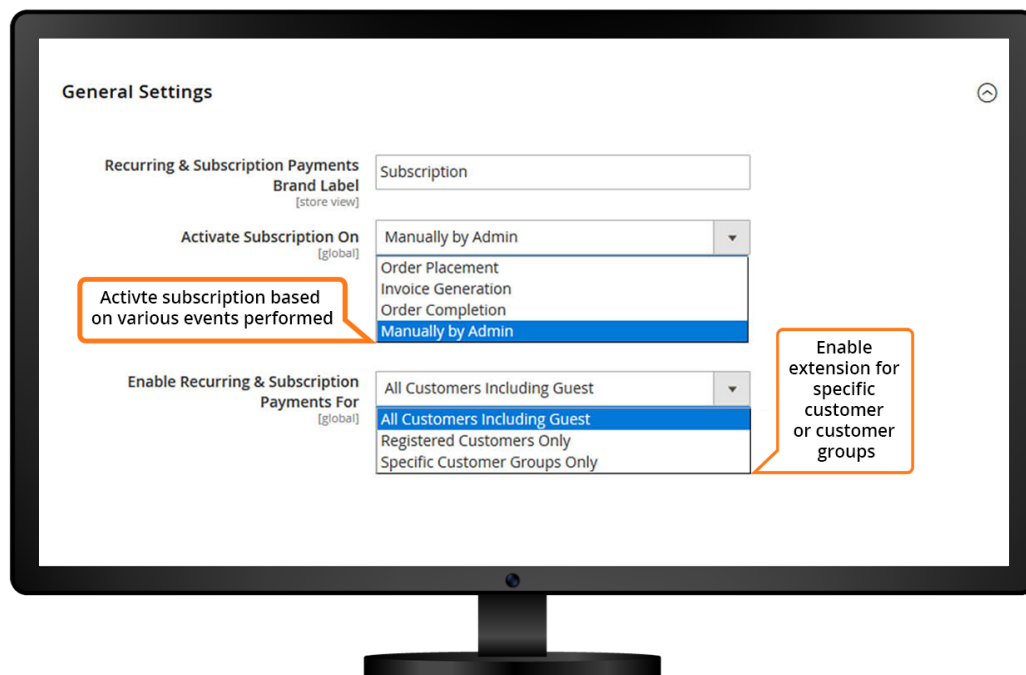


### 3. General Settings

The admin can set the brand label for recurring and subscription payments.

Option to allow activation of subscription on order placement, invoice generation, order completion or either manually by admin.

The Recurring Payments extension can be enabled for specific customers or customer groups. It comprises all customers including guest, registered customers only or for specific customer groups only.



## 4. Discount Settings

The admin can select yes to apply for a discount.

The admin can select which customer group should avail the discount offer on subscription.

Option to apply discount on either all terms, first term or all except first term.

The admin can calculate discounts in either percentage or fixed amount.

Option to set the discount value by the admin.

The screenshot shows a 'Discount Settings' form on a monitor. The form contains the following fields and options:

- Apply Discount [global]**: A dropdown menu with options 'Yes', 'Yes', and 'No'. A callout box points to this field with the text: "Select 'Yes' in order to apply discount".
- Discount Available To [global]**: A dropdown menu with options 'All Customers Including Guest', 'All Customers Including Guest', 'Registered Customers Only', and 'Specific Customer Groups Only'. A callout box points to this field with the text: "Admin can decide which customer group should avail the discount offer on subscription".
- Apply Discount On [global]**: A dropdown menu with options 'All Terms', 'All Terms', 'First Term', and 'All Except First Term'.
- Calculate Discount In [global]**: A dropdown menu with options 'Percentage', 'Fixed Amount', and 'Percentage'.
- Discount Value [global]**: A text input field containing the value '5'.



## 5. Order Confirmation Email Settings

The admin can set yes to send order confirmation email to the customers.

Option to select the email sender.

Allows admin to choose the email template.

The admin can add the email CC.

**Order Confirmation Email Settings**

Send Order Confirmation Email [global] Yes

Yes  
No

This email will only be sent if subscription is activated.

Email Sender [global] General Contact

General Contact  
Sales Representative  
Customer Support  
Custom Email 1  
Custom Email 2

Email Template [global] Recurring & Subscription Payments Order Cor

Email CC To [global] admin@gmail.com

Send confirmation email to customers who have subscribed for product (s). This email will be sent automatically if subscription is activated

## 6. Upcoming Payment Reminder Email Settings

The admin can set yes to send an upcoming payment reminder email.

Set the number of days to send email before payment due dates.

Select the email sender from the drop-down menu.

The admin can choose the email template for the payment reminder email.

**Upcoming Payment Reminder Email Settings**

**Send Upcoming Payment Reminder Email** [global] Yes

**Email** [global] This email will only be sent if subscription is activated.

**Send Email Before Days** [global] 3

The days will be considered based on due date of upcoming payment.

**Email Sender** [global] General Contact

**Email Template** [global] Next Payments Reminder Email (Default)

**Email CC To** [global] admin@gmail.com

Set days to send emails before payment due dates

## 7. Subscription Status Notification Settings

The admin can send notifications for change in subscription status.

The admin can configure and create new templates from the backend.

Subscription Status Notifications Settings

Send Notifications for Status [global]

- Active
- Suspended
- Cancelled
- Expired

Active Status Email Template [global] Active status Email (Default)

Suspended Status Email Template [global] Suspend status Email (Default)

Cancel Status Email Template [global] Cancel status Email (Default)

Expire Status Email Template [global] Expire status Email (Default)

Email Sender [global] General Contact

Email CC To [global] admin@gmail.com

Send notification regarding change in subscription status

Admin can configure and create new template from the backend

## 8. Subscription Expiry Reminder Email Settings

The admin can enable or disable the subscription expiry reminder email.

Allows admin to set the number of days before which the email has been sent.

The admin can select the email sender and email template from the drop-down menu.

**Subscription Expiry Reminder Email Settings**

**Subscription Expiry Reminder Email** [global] Yes   
This email will only be sent if subscription is activated.

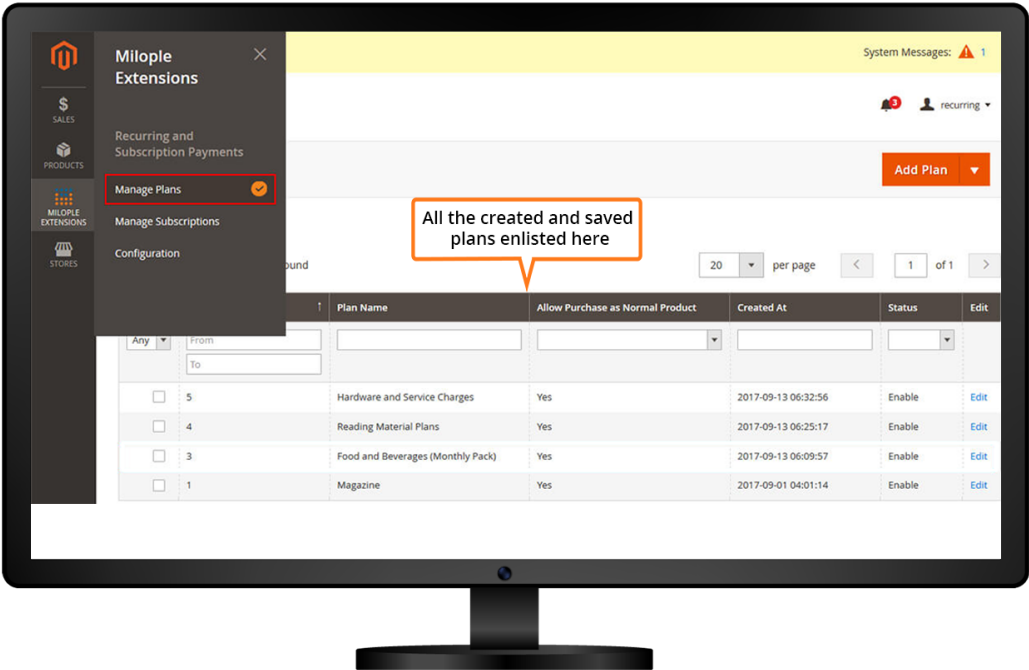
**Send Email Before Days** [global] 4  
The days will be considered based on last term end date of subscription.

**Email Sender** [global] General Contact  Admin can choose the email sender from the list

**Email Template** [global] Subscription Expiry Reminder (Default)

**Email CC To** [global] admin@gmail.com

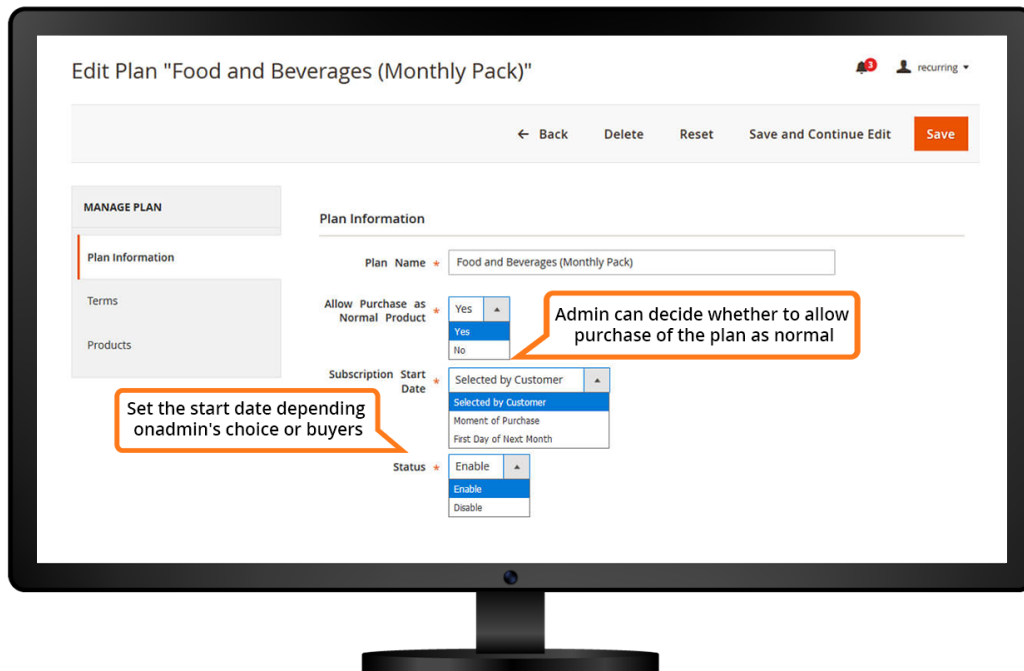
In the "Manage Plans" grid, all the created and saved plans are listed here.



The admin can set the plan name.

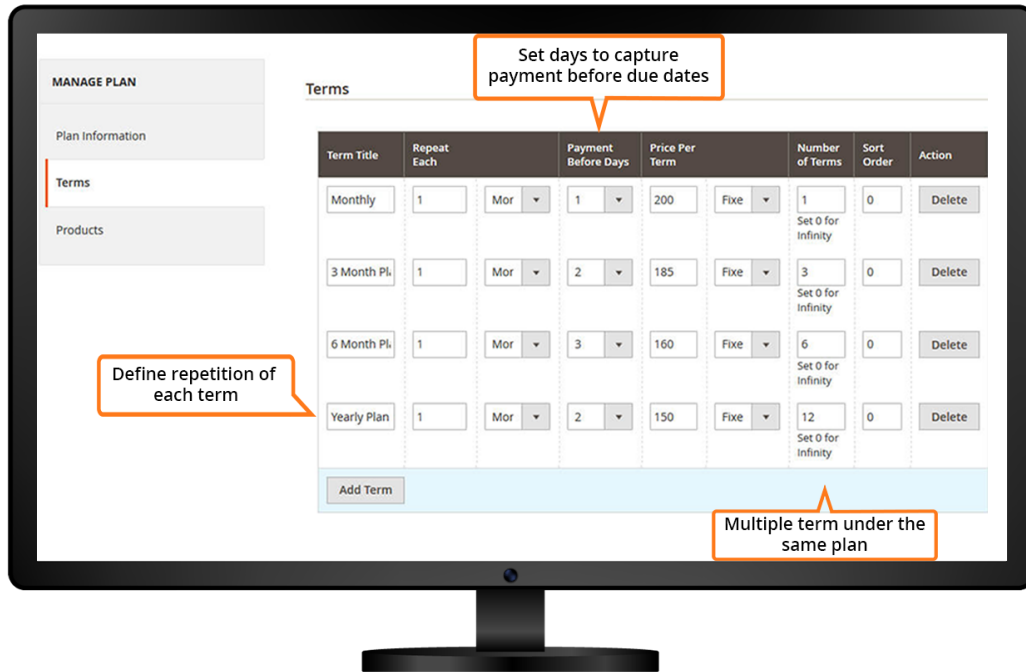
Option to decide whether to allow purchase of the plan as normal or not.

Allows admin to select the subscription starting and ending date.



The admin can set the number of days to capture payment before due date.

Option to define repetition of every term and can even choose multiple terms under the similar plan.



Option to choose the products that are to be assigned from grid, ID or SKU.

The admin can choose the product type from the options in the drop-down menu.

Allows admin to decide the configurable product visibility that is to be hidden in the frontend.

The screenshot shows a product management interface with the following components:

- Top Bar:** Navigation buttons for Back, Delete, Reset, Save and Continue Edit, and a Save button.
- Left Sidebar:** A 'MANAGE PLAN' section with sub-items for Plan Information, Terms, and Products.
- Search and Filter:** A search bar and a 'Reset Filter' button.
- Table:** A table with 10 columns: ID, Name, Type, Attribute Set, Sku, Price, Quantity, Visibility, and Status. It contains 3 rows of product data.
- Callouts:** Four orange callout boxes with white text pointing to specific features: 'Select the products to be assigned from grid, ID or SKU' (pointing to the top bar), 'Select the product type from the options in the drop down menu' (pointing to the 'Type' column), 'Admin can decide the configurable product visibility to be hidden in the frontend' (pointing to the 'Visibility' column), and 'Assign status to the product' (pointing to the 'Status' column).

<input checked="" type="checkbox"/>	ID	Name	Type	Attribute Set	Sku	Price	Quantity	Visibility	Status
<input checked="" type="checkbox"/>	2056	Honeywell1	Bundle Product	Default	Honeywell1		0	Catalog, Search	Enabled
<input checked="" type="checkbox"/>	2055	Diamond Club	Virtual Product	Default	Diamond Club	\$80.00	99995	Catalog, Search	Enabled
<input checked="" type="checkbox"/>	2053	Nutrition Powder - Simple Products	Simple Product	Default	Nutrition Powder - Simple Products	\$200.00	462	Catalog, Search	Enabled



Allows admin to define the start date, end date and upcoming payment reminder.

The admin can define the subscription plan, term, method of shipping and payment method. Also, the admin can assign the subscription status.

