

“SUMO Subscriptions” Documentation by Fantastic Plugins

SUMO SUBSCRIPTIONS

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DESCRIPTION

SUMO Subscriptions is a subscription extension for WooCommerce. Using SUMO Subscriptions, you can create and sell subscription products On your existing WooCommerce shop. SUMO Subscriptions supports simple subscription products, variable subscription products and grouped subscription products.

INSTALLATION AND ACTIVATION

REQUIREMENTS

The minimum server requirements and the WordPress requirements are as follows:

- PHP 5.2.4 or greater
- MySQL 5.0 or greater
- WordPress 3.4 or higher
- WooCommerce 2.2+

HOW TO INSTALL SUMO SUBSCRIPTIONS?

1. Login to your codecanyon account
2. Go to Downloads Tab
3. You will find SUMO Subscriptions
4. Download sumosubscriptions.zip (PLEASE NOTE THE DOWNLOADED FILES WILL ALWAYS BE THE LATEST VERSION)
5. Unzip sumosubscriptions.zip inside which you will find the Plugins files i.e. sumosubscriptions.zip
6. Install SUMO Subscriptions i.e. sumosubscriptions.zip using WordPress Dashboard
7. Activate the Plugin

HOW TO UPGRADE TO A NEWER VERSION OF SUMO SUBSCRIPTIONS?

Please always test the new version in a testing site before you upgrade to the new version in your live site.

If you are using an older version and want to upgrade to the latest version of SUMO Subscriptions then please do the following steps,

1. Login to your codecanyon account
2. Go to Downloads Tab
3. You will find SUMO Subscriptions
4. Download sumosubscriptions.zip (PLEASE NOTE THE DOWNLOADED FILES WILL ALWAYS BE THE LATEST VERSION)
5. Unzip sumosubscriptions.zip inside which you will find the Plugins files i.e. sumosubscriptions.zip
6. Deactivate and Delete the existing version of SUMO Subscriptions in your site
7. Install the latest version of SUMO Subscriptions i.e. sumosubscriptions.zip using WordPress Dashboard
8. Activate the Plugin

Please note you will not lose any settings values, data etc by following the above steps.

UPGRADE

If you are using an older version of the plugin and want to upgrade to the latest version, then please follow the steps given below:

- **Deactivate** and **Delete** the existing version of SUMO Subscriptions plugin in your site.
- Follow the steps given in the **Installation & Activation** section for installing the latest version of SUMO Subscriptions.
- **Activate** the plugin.

Note: You will not lose any settings,data, etc by following the above steps.

FEATURES

- Simple subscriptions, variable subscriptions and grouped product subscriptions
- Order subscriptions for non subscription products
- Renewals of subscription products can be synchronized
- Prorate payment can be charged for subscription products with synchronized renewals
- Multiple subscriptions in single checkout
- Subscription products can be purchased along with non-subscription products in single checkout
- Inbuilt PayPal Adaptive Payment Gateway for Automatic Subscription Renewal

- Automatic Subscription Renewal using PayPal Subscriptions API
- Inbuilt PayPal Reference Transaction Gateway for Automatic Subscription Renewal
- Automatic subscription renewal using SUMO Reward Points gateway(needs SUMO Reward Points plugin)
- Inbuilt Stripe payment gateway for Automatic Subscription Renewal
- Subscribers can choose to pre-approve the subscription renewal payments
- Subscribers can be forced to pre-approve the subscription renewal payments
- Manual subscription renewal using any WooCommerce supported payment gateway
- Subscribers can purchase multiple quantities of the same subscription product
- Subscribers can choose Order Level Subscription on checkout
- Site admin can create Manual Subscription Order for the Subscribers
- Limit subscription for each subscriber by no limit, one active subscription per product or one active subscription throughout the site
- Both free trial and paid trial supported
- Limit trial for each subscriber by no limit, one trial per product or one trial throughout the Site
- Subscribers can pause or cancel their subscriptions
- Site admin can pause or cancel any subscription
- Subscribers can change their subscriptions from automatic subscription renewal to manual subscription renewal and vice versa
- Subscribers can Upgrade/Downgrade/Crossgrade between Variations of variable subscription product and other subscription product in Grouped Subscription products
- Subscribers can switch between variations of the variable subscription product
- Subscription price and subscription period can be set
- Trial fee and sign up fee can be set
- Option to get optional trial fee and sign up fee from the user
- Site admin can view the list of subscriptions purchased on the site
- Renewal date for any subscription can be changed by site admin
- Log history for each subscription is captured and listed in each subscription page
- Separate email templates for manual subscription renewal and automatic subscription renewal
- Payment reminder emails can be sent to the subscribers to make payments or to add funds to the account in case of inbuilt PayPal Adaptive Payment gateway and SUMO Reward Points gateway if SUMO Reward Points plugin is Activated
- Option to include/exclude shipping cost in subscription renewal
- Option to include/exclude tax cost in subscription renewal
- Option to include coupon code discount in subscription renewal
- New coupon types for subscription products(1. Signup fee discount, 2. Signup fee % discount, 3. Recurring fee discount, 4. Recurring fee % discount)

- Option to restrict coupon code discount for specific user(s)/user role(s) in subscription renewal
- Number of renewal(s) to apply coupon code discount in subscription renewal can be set
- Time before due date for creating the renewal orders can be customized
- When to send the payment reminder emails can be customized
- Multiple payment reminder emails can be sent
- Supports payment overdue feature
- Duration of payment overdue can be customized
- Mixed checkout feature
- Option for the subscription to be changed to manual renewal mode when the subscriber cancels the automatic payment (Inbuilt PayPal Adaptive Payment gateway and SUMO Reward Points gateway(needs SUMO Reward Points plugin))
- Admin can manually create a subscription order
- Settings of subscription products can be bulk updated using Bulk Update
- Master Log to record all the transactions throughout the site
- Highly customizable
- Translation ready
- And more

OVERVIEW

SUMO Subscriptions - Features

	SUMO Subscriptions - PayPal Adaptive (Automatic)	SUMO Subscriptions - PayPal Reference Transactions (Automatic)	SUMO Subscriptions - Stripe(Automatic)	PayPal Subscriptions API (Automatic)	SUMO Reward Points Payment Gateway (Requires SUMO Reward Points Plugin) (Automatic)	Any WooCommerce Supported Payment Gateway (Manual)
Simple Product, Variable Product, Grouped Product	✓	✓	✓	✓	✓	✓
Trial Restriction	✓	✓	✓	✓	✓	✓
Quantity Restriction	✓	✓	✓	✓	✓	✓
Order Subscriptions	✓	✓	✓	✓	✓	✓
Subscription Synchronization	✓	✓	✓	✗	✓	✓
Subscription Switching between Identical Variations	✓	✓	✓	✗	✓	✓

SUMO Subscriptions - Customization						
	SUMO Subscriptions - PayPal Adaptive (Automatic)	SUMO Subscriptions - PayPal Reference Transactions (Automatic)	SUMO Subscriptions - Stripe(Automatic)	PayPal Subscriptions API (Automatic)	SUMO Reward Points Payment Gateway (Requires SUMO Reward Points Plugin) (Automatic)	Any WooCommerce Supported Payment Gateway (Manual)
Switching to Manual Payment on Payment Failure	✓	✓	✓	✗	✓	✓
Payment Reminder Emails	✓	✓	✓	✗	✓	✓
Include Shipping Cost in Renewal Order	✓	✓	✓	✗	✓	✓
Include Tax Cost in Renewal Order	✓	✓	✓	✗	✓	✓
Renewal Order creation Time	✓	✓	✓	✗	✓	✓
Option for User to Preapprove Future Renewals	✓	✓	✓	✓	✓	✓
Option for User to Pause/Suspend Subscriptions	✓	✓	✓	✗	✓	✓
Option for User to Cancell the Subscriptions	✓	✓	✓	✓	✓	✓
Renewal Order Creation Delay Time	✓	✓	✓	✗	✓	✓
Payment Retrying in Overdue Status	✓	✓	✓	✗	✓	✓
Payment Retrying in Suspend Status	✓	✓	✓	✗	✓	✓
Switching to Manual Payment when user revokes Preapproval access	✓	✓	✓	✗	✓	✓

SUMO Subscriptions - Subscription Status

	SUMO Subscriptions - PayPal Adaptive (Automatic)	SUMO Subscriptions - PayPal Reference Transactions (Automatic)	SUMO Subscriptions - Stripe(Automatic)	PayPal Subscriptions API (Automatic)	SUMO Reward Points Payment Gateway (Requires SUMO Reward Points Plugin) (Automatic)	Any WooCommerce Supported Payment Gateway (Manual)
Pending	✓	✓	✓	✓	✓	✓
Trial	✓	✓	✓	✓	✓	✓
Active	✓	✓	✓	✓	✓	✓
Pause	✓	✓	✓	✗	✓	✓
Overdue	✓	✓	✓	✗	✓	✓
Suspended	✓	✓	✓	✓	✓	✓
Cancelled	✓	✓	✓	✓	✓	✓
Failed	✓	✓	✓	✓	✓	✓
Expired	✓	✓	✓	✓	✓	✓

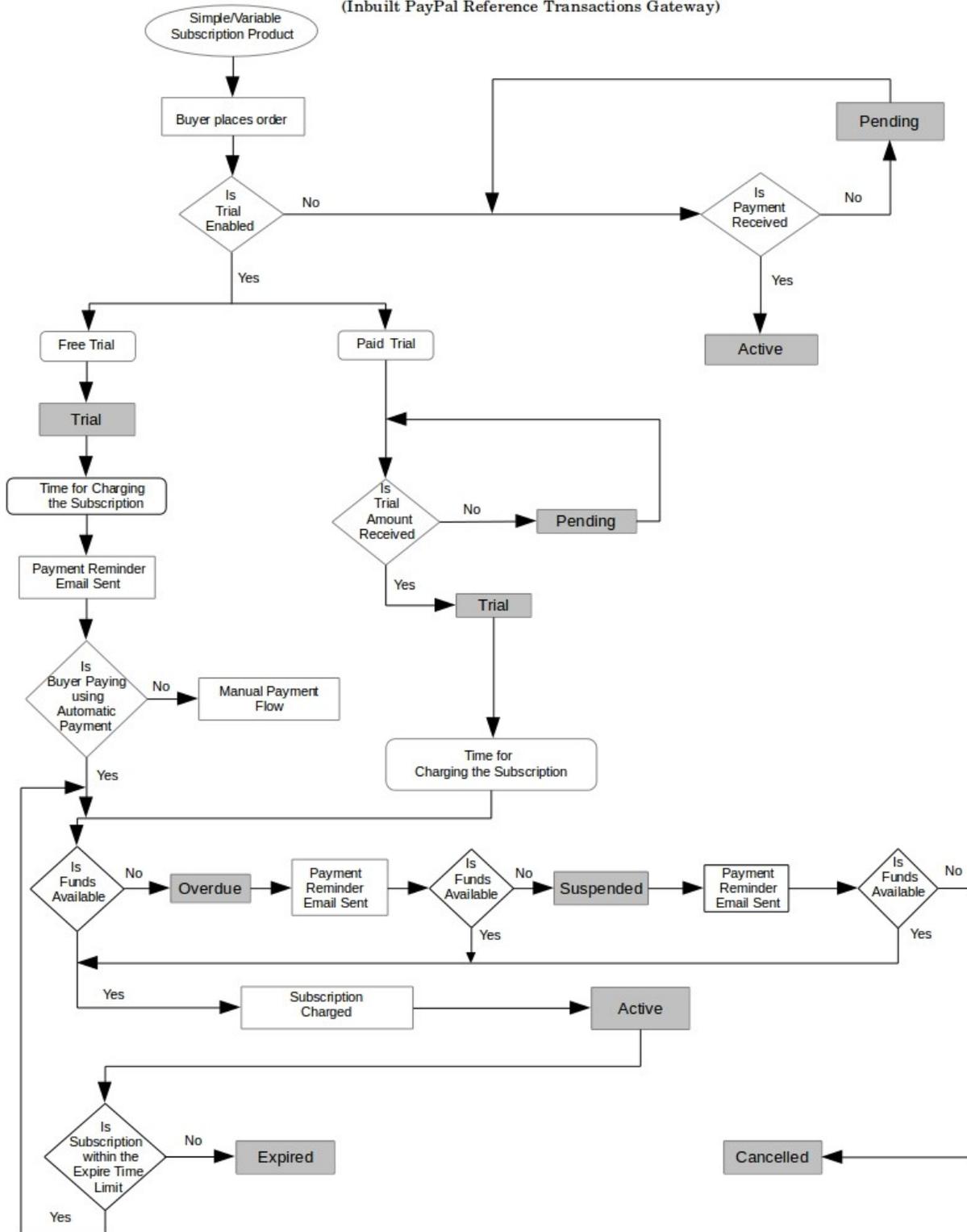
WORKFLOW

- User adds one or more subscription products to cart
- In checkout page, all the available payment gateways will be listed
- The user can make payment with any one of the available payment gateways
- If the user chooses to make payment with the inbuilt PayPal Adaptive Payment gateway or PayPal Reference Transaction gateway, there is an option for the user to pre-approve the future renewal payments for the subscription, when enabled renewal price will be automatically deducted from subscriber's PayPal account at the time of Renewal.
- If the user chooses to make payment with standard PayPal, then there is an option for the user to enable Automatic Renewal, when enabled PayPal will take care of the subscription renewals and charging of the renewal of subscriptions from the subscriber's PayPal account.
- If the user chooses to make payment with inbuilt Stripe Payment gateway, then there is an option for the user to enable Automatic Renewal, when enabled, during renewal, payment will be automatically charged from the subscriber's account.
- If the user chooses to make payment with SUMO Reward Points gateway(needs SUMO Reward Points plugin), there is an option for the user to pre-approve the future renewal payments for the subscription, when enabled, the cumulative points will be deducted from subscriber's account.
- If the user doesn't approve or enable future renewal option in any of the above gateways, then the user needs to make the future renewal payments manually.
- The subscription will be active once the payment is received.
- If the user chooses to make payment with some other WooCommerce supported gateways, then subscription renewal has to happen manually. If that situation arises, an invoice email along with the payment link will be sent to the user(subscriber), with the help of that link they can renew their subscription.
- Once the payment is made by the user, the subscription will be renewed.

AUTOMATIC PAYMENT FLOW

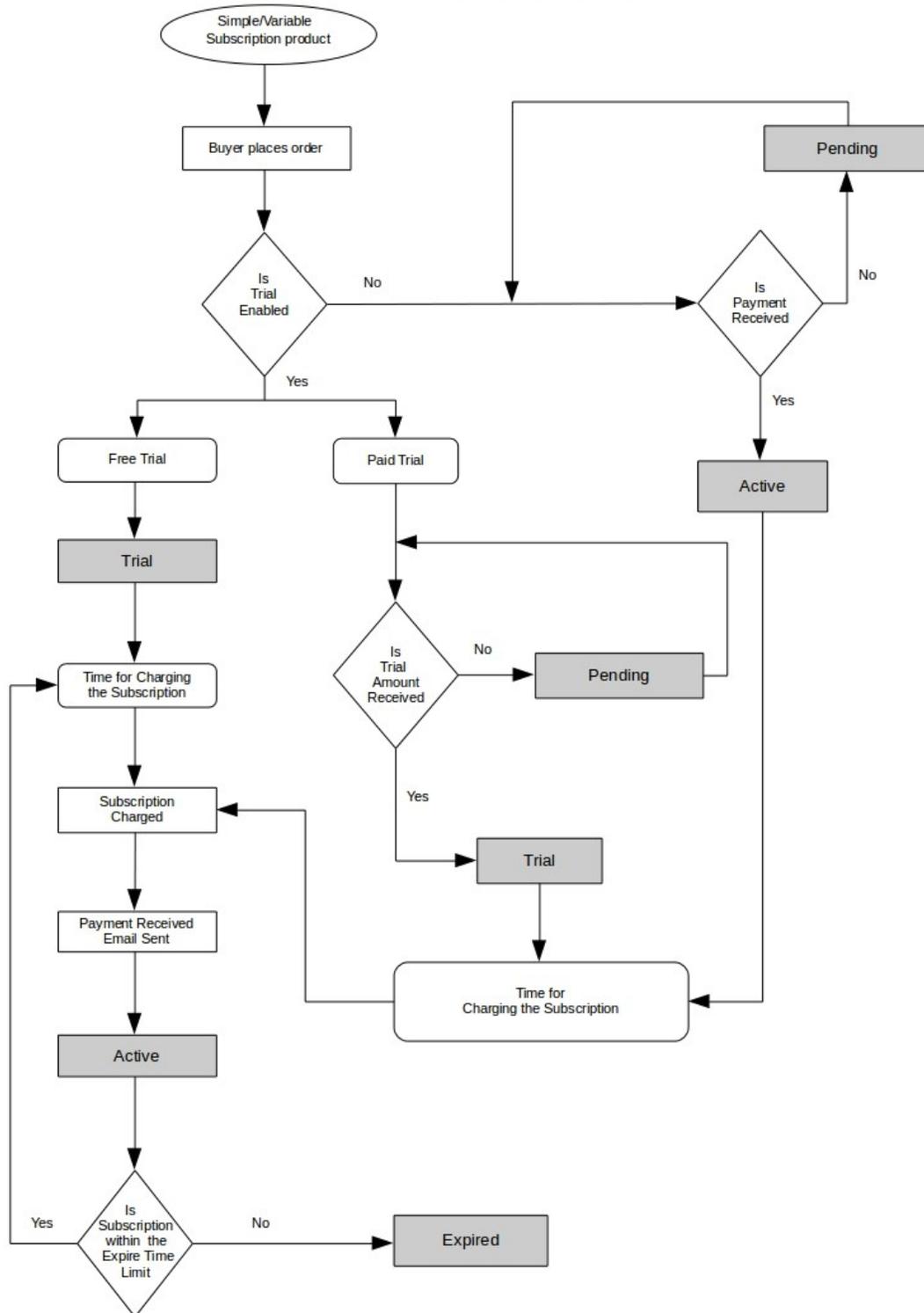
SUMO Subscriptions - Automatic Payment

(Inbuilt PayPal Reference Transactions Gateway)



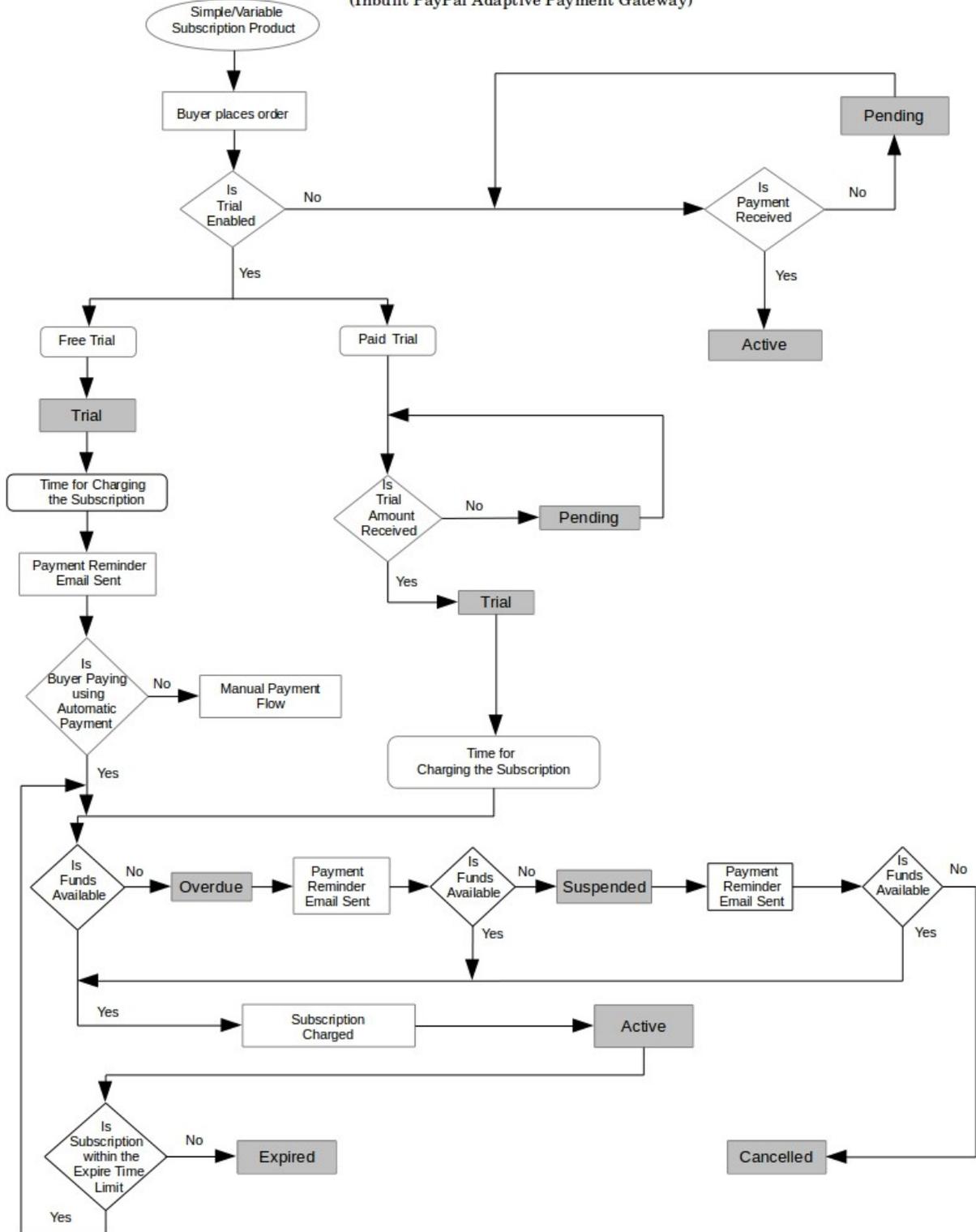
SUMO Subscriptions - Automatic Payment

(Inbuilt PayPal Subscriptions)



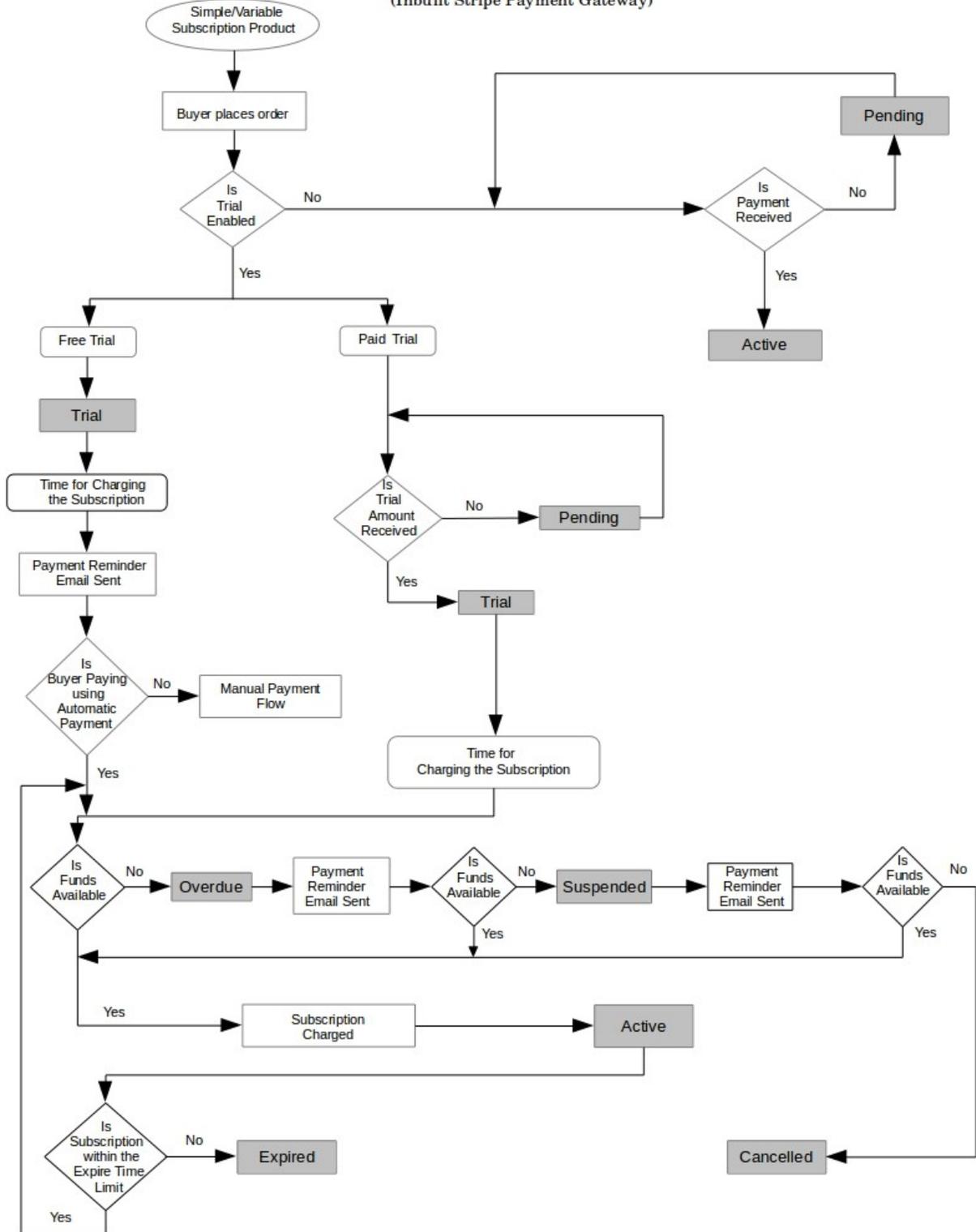
SUMO Subscriptions - Automatic Payment

(Inbuilt PayPal Adaptive Payment Gateway)



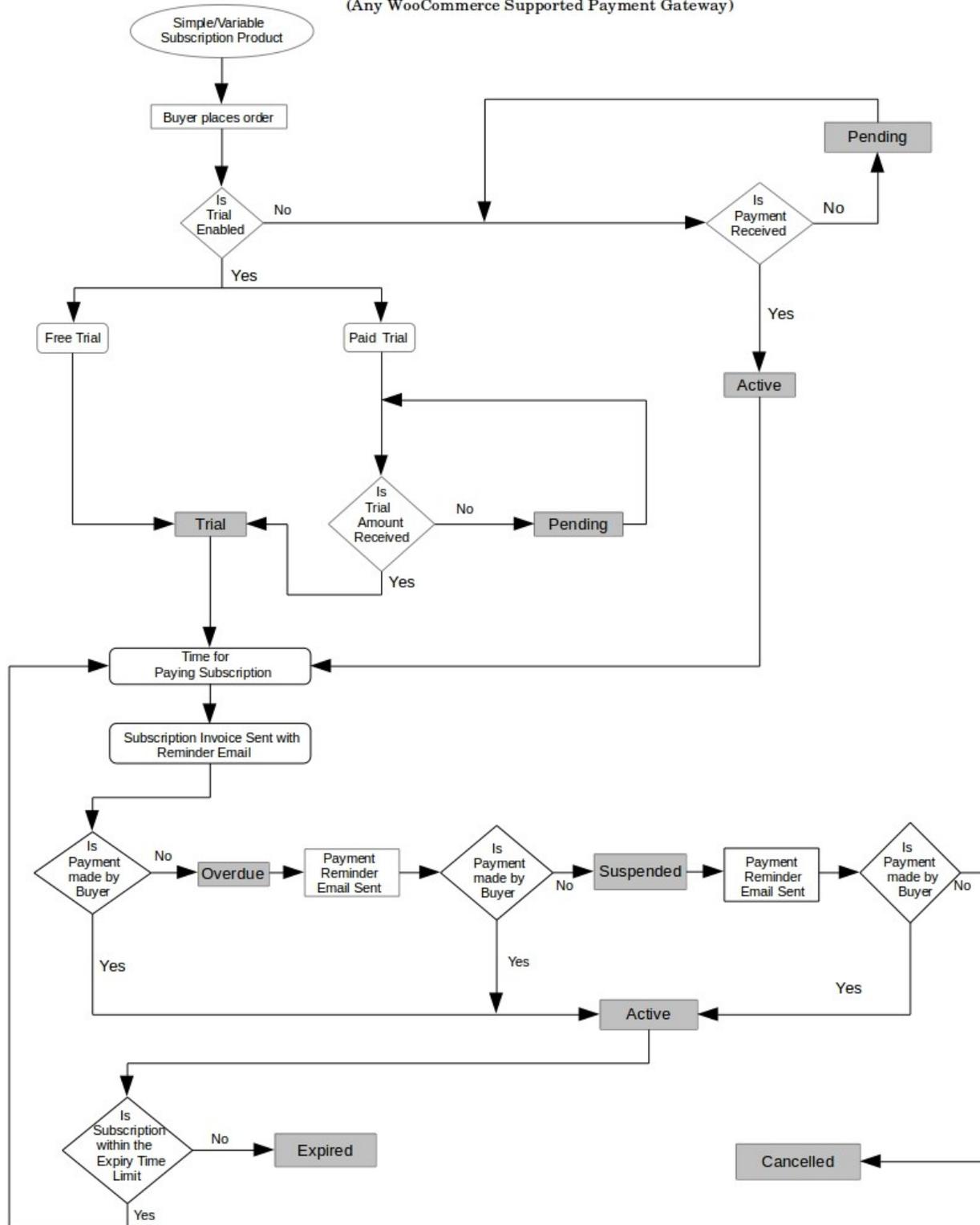
SUMO Subscriptions - Automatic Payment

(Inbuilt Stripe Payment Gateway)



MANUAL PAYMENT FLOW

SUMO Subscriptions - Manual Payment (Any WooCommerce Supported Payment Gateway)



ORDER SUBSCRIPTIONS

- Subscriber can choose to purchase the products which are added in the cart as Order Subscription in checkout page. It will be considered as a Single Subscription for the Subscriber.
- Order subscription will not be applicable if the Cart contains Subscription Product or Membership Plan Access Product(from SUMO Memberships plugin).
- Trial Fee and Sign up Fee are not applicable for Order Subscriptions.
- For Order Subscriptions, it is not possible for the Admin to customize the Renewal Order Fee.

UPGRADE/DOWNGRADE

- Using Upgrade/Downgrade, customers can switch to different Variations of a Variable Subscription Product and different Subscription Product in Grouped Subscriptions
- After Purchasing a Variable/Grouped Subscription product, on their My Account Page Subscriptions sections Upgrade/Downgrade button will be displayed which when clicked they will be redirected to the Variable Product/Grouped Product in order to select the Subscription product they wish to Upgrade/Downgrade
- Based on Admin Configuration Prorate amount for the new subscription product will be calculated and charged from the user

Note:

- Upgrade/Downgrade feature will not work for synchronization enabled subscription products.
- If the subscription order is placed using PayPal Subscription API payment gateway, then upgrade/downgrade option will not be displayed for the user.
- Subscribers can switch only when Subscription status is Active.

CALCULATION FOR UPGRADE/DOWNGRADE/CROSSGRADE

For example, let us consider a variable subscription product with 2 variations(Variation 1 & Variation 2), one variation priced \$30/month and another priced \$30/week

When the price is prorated for 1 day, the result will be as follows

Variation 1 → $\$30/30 \text{ days} = \$1/\text{day}$

Variation 2 → $\$30/7 \text{ days} = \$4.29/\text{day}$

In the above example, price per day of Variation 2 is higher than Variation 1

Upgrade/Downgrade/Crossgrade is defined as follows,

Upgrade → Price per day of switched subscription is higher than previous subscription

Downgrade → Price per day of switched subscription is lower than previous subscription

Crossgrade → Price per day of switched subscription is same as previous subscription

CONFIGURATION

CREATING A SIMPLE SUBSCRIPTION PRODUCT

Go to **Product** -> **Add Product**

- Select the product type as **Simple Product**.
- Enter the regular price/sale price for the subscription product
- Enable **SUMO Subscription**
- Set the duration of the subscription product
- If you want to provide a trial for your subscription, then select **Forced Trial** in **Trial Period** option or else select **Optional Trial** in **Trial Period** option to give an option for the subscriber to select the Trial as optional.
- Select the **Trial Type**
- If you wish to provide a paid trial, then the amount for the paid trial has to be entered.
- Set the **Trial Duration**.
- If you wish to set a sign up fee for the subscription product, then select **Forced Sign up** in **Sign up Fee** option or else select **Optional Sign up** in **Sign up Fee** option to give an option for the subscriber to select the Sign up as optional.
- Set the sign up fee in **Sign up Value** field
- Choose the **Recurring Cycle** of the subscription product. By default, the **Recurring Cycle** will be **Indefinite**.
- If Synchronized Renewals has to be happen for the product, then choose the day by which Renewal has to be happen in **Synchronize Renewals** option(will be displayed only when Synchronization is Enabled in **General** tab).
- If you wish to give downloadable products along with the Subscription Product, then select **Enable Additional Digital Downloads** checkbox and select the Downloadable Products in Choose the Downloadable Products field(will be displayed only when Additional Digital Downloads is Enabled in **General** tab)
- Publish the product.

Note:

1. **Synchronize Renewals** option will not be applicable for Day Subscriptions

2. If **Subscription Duration** is selected as **Week** or **Month** and **Synchronize Renewal** is set as **Do not Synchronize**, then synchronized renewal will not happen.
3. If **Subscription Duration** is selected as **Year** and **0** is set as Synchronize Renewal, then synchronized renewal will not happen.
4. If the Subscription is a Weekly Subscription, then Synchronized Renewal will happen only on the specified weeks based on the Subscription Duration.
 - **For example:** If the Subscription is 3 Week duration and Synchronization is set as Sunday each Week, then Synchronization will happen every 3rd, 6th, 9th Sunday and so on. If a user Subscribes in between, then they will be charged only on a Synchronized Sunday. Until that it will be considered as Trial. If Prorate is Enabled in General Settings, then Prorate will be calculated.
5. For Monthly Subscription, Synchronized Renewals will work only if the duration is 1 Month, 2 Months, 3 Months, 4 Months, 6 Months, 12 Months and 24 Months. Synchronized Renewals will happen for Monthly Subscription based on the given month and on the upcoming months based on Subscription Duration.
 - **For example:** If the Subscription is 4 month duration and Synchronization is set as 1st January, then Synchronization will happen on 1st January, 1st May, 1st September and so on. In this case, if a user subscribes on December, for them synchronization will happen on 1st January. If a user subscribes on July, for them synchronization will happen on 1st September.
6. If the Subscription is a Yearly Subscription, then Synchronized Renewal will happen on the year based on Subscription Duration.
 - **For example:** If the Subscription is 2 Year subscription and Synchronization is set as 1st January and current date is 01-10-16, then Synchronization will happen on 01-01-18, 01-01-20, 01-01-22, and so on. When a user subscribes on or before 01-01-18, then Synchronization will happen on 01-01-18. In case if a user subscribes after 01-01-18, then Synchronization will happen only on 01-01-20. Until that it will be considered as Trial. If Prorate is Enabled in General Settings, then Prorate will be calculated.
7. If Trial is enabled for the product, then Synchronized Renewal will happen after the Trial Period. If the subscription is a Monthly Subscription and the duration is 2 months with 1 month Trial period, then Synchronized Renewal will happen after first occurrence of Synchronization after Trial period of 1 Month.
 - **For example:** Based on the above scenario, if Synchronization is set as 1st January and the Subscription purchase date is 10th December, then Trial duration will be from 10th December to 9th January. As the Synchronization date exceeds the payment date it will check for next Synchronization date which will be occurring on 1st March. Until that it will be considered as Trial. If Prorate is Enabled in General Settings, then Prorate will be calculated.

- The above scenario will be applicable for Weekly, Monthly and Yearly Subscriptions.
8. If the Synchronization month which is set exceeds the current year for Monthly subscription, then first synchronization will happen only on same month of Next year. Until that it will be considered as Free or Prorate will be charged if Prorate is Enabled. This is the limitation of the plugin.
 - **For example:** If the Subscription Duration is 2 Months, current date is 01-10-16 and synchronization is set as 01 July, then first sync will happen only on 01-06-17. Until that it will be considered as Trial. If Prorate is Enabled in General Settings, then Prorate will be calculated.
 9. The Downloadable Products which are given in **Additional Digital Downloads** will be available for download under **Downloads** section in **My Account Page** once the Subscriber purchases the Subscription Product.

CREATING A VARIABLE SUBSCRIPTION PRODUCT

Go to **Product -> Add Product**

- Select the product type as **Variable Product**.
- Create attributes for the variable subscription product.
- After creating the attributes, create a **Variation** for the subscription product.
- Enter the regular price/sale price for the subscription variation.
- Enable **SUMO Subscription**.
- Set the duration of the subscription product
- If you want to provide a trial for your subscription, then select **Forced Trial** in **Trial Period** option or else select **Optional Trial** in **Trial Period** option to give an option for the subscriber to select the Trial as optional.
- Select the **Trial Type**
- If you wish to provide a paid trial, then the amount for the paid trial has to be entered.
- Set the **Trial Duration**.
- If you wish to set a sign up fee for the subscription product, then select **Forced Sign up** in **Sign up Fee** option or else select **Optional Sign up** in **Sign up Fee** option to give an option for the subscriber to select the Sign up as optional.
- Set the sign up fee in **Sign up Value** field
- Choose the **Recurring Cycle** of the subscription product. By default, the **Recurring Cycle** will be **Indefinite**.
- If *Synchronized* Renewals has to be happen for the product, then choose the day by which Renewal has to be happen in **Synchronize Renewals** option(will be displayed only when Synchronization is Enabled in **General** tab)

- If you wish to give downloadable products along with the Subscription Product, then select **Enable Additional Digital Downloads** checkbox and select the Downloadable Products in Choose the Downloadable Products field(will be displayed only when Additional Digital Downloads is Enabled in **General** tab)
- Publish the product.

Note:

Please refer to **Note** section under **Creating a simple subscription product**

GROUPING SUBSCRIPTION PRODUCTS(ONLY SIMPLE SUBSCRIPTION PRODUCTS CAN BE GROUPED)

Go to **Product -> Add Product**

- Select the Product Type as Grouped Product.
- Publish the Product.
- Then, create a Simple Subscription Product using the steps which has given in **Creating a simple subscription product** section.
- Click **Linked Products**.
- In the **Grouping** field, select the Grouped Product which was created.
- Publish the Product.
- Associate the Grouped Product in multiple Simple Subscription Products so that when the user views the Grouped Product, all the associated Simple Subscription products which are grouped will be displayed within the Grouped Product.

MANUAL SUBSCRIPTION ORDER CREATION BY ADMIN

Go to **WooCommerce -> Orders -> Add Order**

- Choose the user whom needs to assign the Subscription product in **Customer** field.
- Provide the **Billing Details / Shipping Details** in the respective fields.
- Set the status of the Order in **Order status** field.
- If Order status is set as On Hold, Subscription status will become Pending.
- If **Order status** is set as Pending Payment, Subscription status will become Pending.
- If Order status is set as Processing, Subscription status will become Active.
- If Order status is set as Completed, Subscription status will become Active.
- If Order status is set as Cancelled, Subscription status will become Cancelled.
- If Order status is set as Failed, Subscription status will become Cancelled.
- In Item Metabox, click Add Item(s) button and then click Add Product(s) button.
- Choose the Subscription product by searching the product name and click Add button.
- Save the Order.

PAYMENT GATEWAYS SUPPORTED FOR GETTING AUTOMATIC SUBSCRIPTION PAYMENTS

1. PayPal Subscriptions API(standard PayPal gateway that comes along with WooCommerce by default)
2. Inbuilt SUMO Subscriptions - PayPal Reference Transactions Payment gateway
3. Inbuilt SUMO Subscriptions - PayPal Adaptive Payment gateway
4. Inbuilt SUMO Subscriptions - Stripe Payment gateway

CONFIGURING STANDARD PAYPAL PAYMENT GATEWAY FOR GETTING AUTOMATIC/MANUAL SUBSCRIPTION PAYMENTS

- SUMO Subscriptions plugin supports PayPal standard subscription API to handle automatic renewal of subscription and charging of renewal of subscription.
- To enable this feature go to **SUMO Subscriptions -> Settings -> General Settings -> PayPal Settings**
- Enable the **Include PayPal Standard Subscription API** checkbox.
- If user selects **Enable Automatic Payments** checkbox when selecting PayPal gateway in checkout page and place the order, then payment for the renewal order will be automatically charged. If the checkbox is not selected, then renewals will need to happen manually.

Limitations of using Standard PayPal Subscriptions API Payment gateway for Automatic Subscription:

- Subscription Renewal Price cannot be modified by the site admin.
- Switching from one variation to another is not allowed by subscriber/site admin.
- Upgrade/Downgrade feature will not work
- **PayPal** will manage with automatic creation of Renewal Orders and Processing of Payments. It will not consider any plugin settings for creating renewal orders.
- Users can't subscribe for multiple subscription products in a single checkout(but can subscribe for multiple quantities of same subscription products).
- Change of Status of Subscription is completely based on IPN Response.
- Shipping and Tax cost can't be included/excluded in Renewal Orders. Exact price of subscription amount in parent order will be charged for subscription Renewal.
- **Enable Automatic Payments** checkbox will not display when PayPal payment gateway is chosen, when the Cart contains subscriptions products with Synchronized Renewals.

- PayPal gateway will automatically change to manual recurring mode if the Cart contains more than 1 products(subscription or non-subscription products), Order Subscriptions, the subscription product has Signup Fee(without Trial)

CONFIGURING IPN NOTIFICATIONS ON PAYPAL IN ORDER TO MANAGE SUBSCRIPTIONS

- An IPN (Instant Payment Notification) is a message which is sent from PayPal to the merchant's website in order to keep track of the transactions made in the merchant's website.
- The current status of a subscription is determined based on the IPN received from PayPal.
- To understand the working of IPN please refer to the following URL.<https://developer.paypal.com/docs/classic/products/instant-payment-notification/>
- IPN notifications has to be enabled in the site admin's PayPal account.
- To enable IPN notifications on your PayPal account do the following steps.
- Login with your sandbox PayPal Email id on <https://www.sandbox.paypal.com>.
- Navigate to **MyAccount** → **Profile**
- In profile, click on **Selling Preferences** → **Instant Payment Notification Preferences**
- Click on **Choose IPN Settings**
- Enter your site URL in the **notification URL** text field
- Select **Receive IPN messages** option and save
- Now IPN notifications has been configured and your site will be able to receive IPN notifications from PayPal.

CONFIGURING INBUILT SUMO SUBSCRIPTIONS PAYPAL ADAPTIVE PAYMENT GATEWAY, SUMO SUBSCRIPTIONS PAYPAL REFERENCE TRANSACTIONS PAYMENT GATEWAY

- First of all you need to have either premier or business account type to get your API credentials.
- You can use PayPal sandbox account to try the test payment.
- For getting PayPal API credentials, follow the steps provided in the link <https://developer.paypal.com/docs/classic/products/adaptive-payments/>

To configure SUMO Subscriptions PayPal Adaptive Payment gateway,

Go to **WooCommerce** -> **Settings** -> **Checkout** -> **SUMO Subscriptions - PayPal Adaptive**

- Enable the PayPal Adaptive Payment gateway

- The **Title** and **Description** of the payment gateway can be customized.
- Set validity of Preapproval key by selecting **Enable Preapproval Validity** checkbox. The maximum days that can be set is 365. If you need more than 365 days, then contact PayPal and once the permission is granted by PayPal disable the checkbox.
- Set maximum payment amount by using the gateway by selecting Include "maxTotalAmountOfAllPayments" checkbox. The maximum amount can be set is \$2000. If you need more than \$2000, then contact PayPal and once the permission is granted by PayPal disable the checkbox.
- Enter your PayPal email id in **Receiver Paypal Email** Field.
- You can enable **Sandbox mode** in order to test payments.
- In API credentials option enter the **API Username**, **API Password**, and **API Signature** obtained from the PayPal.
- After entering the **Paypal API credentials**, subscription products can be purchased using PayPal.
- Once you have done with Sandbox mode, proceed with Live mode.

To configure SUMO Subscriptions PayPal Reference Transactions gateway,

Go to **WooCommerce -> Settings -> Checkout -> SUMO Subscriptions - PayPal Reference Transactions**

- Enable the PayPal Reference Transactions gateway
- The **Title** and **Description** of the payment gateway can be customized.
- You can enable **Sandbox mode** in order to test payments.
- In API credentials option enter the **API Username**, **API Password**, and **API Signature** obtained from the PayPal.
- After entering the **Paypal API credentials**, subscription products can be purchased using PayPal.
- Once you have done with Sandbox mode, proceed with Live mode.
- **Note:** While enabling this gateway, whenever new API credentials are given, following message will be displayed: **Check here to know Reference Transactions is enabled or not with your API for SUMO Subscriptions**, click the link in the message to check whether the API credentials are enabled or not for subscriptions. If it is not yet enabled, then please contact PayPal to make it enable with your account.
- **Page Style Name** → Give a name to the Style. If you want to set the style which you have created in your PayPal account(in PayPal, **My Account -> Profile -> Hosted Payment Settings -> Custom Page Styles -> Page Styles**), then give that name.
- **Select Paypal Checkout Page Logo** → Upload a Logo to the checkout page
- **Choose Paypal Checkout Page Border Color** → Select the border color to be displayed in the Paypal checkout page(only appears when redirected to Standard page of PayPal).

- **Note:** The given style will be overridden by the Style which you have created in your PayPal account.

Note:

- API credentials are needed in order for the above gateways to work. If the API credentials are left empty, the gateways won't work.
- By default, when a buyer chooses to pay with the inbuilt PayPal Adaptive Payment gateway or PayPal Reference Transactions gateway, a checkbox will be displayed along with the payment gateway. which when checked, the renewals of the subscription will be automatically charged from the buyer. This behaviour can be customized. To customize this behaviour, go to **SUMO Subscriptions -> Settings -> General Settings -> PayPal Adaptive Settings**
- If the **Remove the option for the Subscriber to choose Automatic/Manual PayPal Adaptive Payment** option is enabled, then the checkbox which is displayed along the payment gateway will be hidden by default, the subscription renewals will be automatically charged from the user.
- If you want to stop the feature of automatic subscription renewals, then in **Force Automatic/Manual Payment** option choose **Force Manual PayPal Adaptive Payment**.

CHARGING SUBSCRIPTION RENEWAL PAYMENTS AUTOMATICALLY FROM THE SUBSCRIBER'S ACCOUNT (EXCEPT PAYPAL SUBSCRIPTION API)

- If the buyer chooses to pre-approve the future subscription renewals or Force Automatic Payment is set by the admin, a preapproval key will be created for the buyer who has purchased the subscription.
- The initial subscription charges will be charged immediately from the buyer.
- When the time for the subscription renewal is nearing, the renewal order will be created, based on the day(s) set in **SUMO Subscriptions -> Settings -> General Settings -> Renewal Order Settings -> Create Renewal Order**
- **Example:** If the subscription duration is 5 days and **Create Renewal Order** option is set as 1, then the renewal order for the subscription will be created on the 4th day.
- When the subscription duration is about to end, the subscription system will try to charge for the subscription renewal by using the preapproval key. If the amount has been successfully charged, the subscription will be renewed.

Note: If the subscription system is not able to charge for the subscription renewals, the status of the subscription will become **Overdue**.

CHANGE IN STATUS OF SUBSCRIPTION TO OVERDUE IN AUTOMATIC SUBSCRIPTION RENEWAL(EXCEPT PAYPAL SUBSCRIPTION API)

- When the subscription becomes **Overdue**, then it will remain in that status for a specific duration, the subscriber will still have access to the subscription.
- The duration of the overdue period can be customized in **SUMO Subscriptions -> Settings -> Notification Email Settings -> Overdue Notification by Email**
- A payment reminder email will be sent to subscriber stating the subscription charge failure and a link to make the payment for subscription renewal.
- The subscriber can either add funds to the PayPal account or renew the subscription renewal by making the payment using other gateways with the help of link provided in the email.
- The subscription system will attempt to charge for subscription renewals 2 times a day. This frequency can be customized in **SUMO Subscriptions -> Advanced Settings -> Number of Attempts to charge Automatic Payment during Overdue status**
- If the subscriber makes the payment by clicking the link, using any one of the available payment gateways, the subscription will become active and the subscription renewals will be changed to **Manual Payment Mode**.
- If the subscriber makes the payment by clicking the link, using any Automatic gateways, the subscription will become active and the subscription renewal will be automatically handled by subscription system.
- If the subscription system is unable to charge the amount for the subscription renewal within the specific time, subscription will become **Suspended**.

CHANGE IN STATUS OF SUBSCRIPTION TO SUSPEND IN AUTOMATIC SUBSCRIPTION RENEWAL(EXCEPT PAYPAL SUBSCRIPTIONS API)

- When the subscription becomes **Suspend**, it will remain in that status for a specific duration, during this period the subscriber will not have access to the subscription.
- The duration of the subscription suspend can be customized in **SUMO Subscriptions -> Settings -> Notification Email Settings -> Suspend Notification by Email**
- A payment reminder email will be sent to subscriber stating the subscription charge failure and a link to make the payment for subscription renewal.
- The subscriber can either add funds to the PayPal account or renew the Subscription Renewal by making the payment using the link provided in the email.
- The subscription system will attempt to charge for subscription renewals 2 times a day. This frequency can be customized in **SUMO Subscriptions -> Advanced Settings -> Number of Attempts to charge Automatic Payment during Suspend status**

- If the subscriber makes the payment by clicking the link, using any one of the available payment gateways except inbuilt PayPal Adaptive Payment gateway(when **Force Manual PayPal Adaptive Payment** option is enabled) will become active and the subscription renewals will be changed to **Manual Payment Mode**.
- If the subscriber makes the payment by clicking the link, using inbuilt PayPal Adaptive Payment gateway(when **Force Automatic PayPal Adaptive Payment** option is enabled), a preapproval key will be generated for the subscriber. This new preapproval key will replace the old preapproval key. The subscription will become active and the subscription renewals will be changed to **Manual Payment Mode**. The subscription renewal will be automatically handled by subscription system.
- If the subscription system is unable to charge the amount for the subscription renewal within the specific time, subscription will become **Cancelled**.

CHANGE IN STATUS OF SUBSCRIPTION TO CANCEL IN AUTOMATIC SUBSCRIPTION RENEWAL(EXCEPT PAYPAL SUBSCRIPTION API)

- When the subscription becomes **Cancelled**, the subscriber **will not have access to the Subscription**.
- The subscription will be cancelled by default. This can be customized in **SUMO Subscriptions -> Settings -> Advanced Settings -> Automatic Subscription -> When Automatic Subscription goes to Cancel because of failed Payment, then option**

WHAT HAPPENS IF THE SUBSCRIBER REVOKES ACCESS TO PREAPPROVAL KEY?

- When the subscriber has revoked access to preapproval key, the subscription will be cancelled by default.
- This can be Customized in **SUMO Subscriptions -> Settings -> Advanced -> Autoamatic Subscription -> When Subscriber revokes access to Preapproval Key/Billing ID(PayPal Adaptive Payment, PayPal Reference Transactions, SUMO Reward Points Payment), then option**.

CONFIGURING INBUILT STRIPE PAYMENT GATEWAY TO HANDLE AUTOMATIC/MANUAL PAYMENTS

- In order to use the Inbuilt Stripe payment gateway, a Stripe Account is required. To obtain an account go to <https://dashboard.stripe.com/register?redirect=%2F>
- After sign up go to <https://dashboard.stripe.com/account/apikeys>

Go to **WooCommerce -> Settings -> Checkout -> SUMO Subscriptions - Stripe**

- Enable the Payment Gateway.
- Enable the **Test Mode** check box.
- The Test secret key obtained from the account has to be entered in **Stripe API Test Secret Key** field.
- The Test publishable key obtained from the account has to be entered in **Stripe API Test Publishable Key** field.
- **Checkout Mode** → If "**Lightbox**" is selected then, the Stripe checkout form will be displayed in a Stripe lightbox form. By default, Stripe checkout will be displayed as credit card form.
- **Checkout Form Logo** → Given Checkout form logo to be displayed in Lightbox checkout
- **Checkout Form Name** → Given Checkout form name to be displayed in Lightbox checkout. By default, it will be Site Title.
- **Card Brands to be Displayed** → Selected card brands to be displayed in the gateway title.
- Now, the Subscription products can be purchased using the Inbuilt **Stripe payment Gateway**.
- In order to make real Payments, disable the test mode and enter the Live secret key and Live publishable key.
- The Live secret key obtained from the account has to be entered in **Stripe API Live Secret Key** field.
- The Live publishable key obtained from the account has to be entered in **Stripe API Live Publishable Key** field.

Note:

- If User selects **Enable Automatic Payments** checkbox and completes the order, then payment for the renewal order will be automatically charged. If the checkbox is not selected, then user needs to renew the subscription manually.

CONFIGURING SUMO SUBSCRIPTIONS TO HANDLE MANUAL SUBSCRIPTION PAYMENTS

Manual subscription payments can be done by using any one of the available payment gateways or when the user doesn't pre-approve using the inbuilt payment gateways.

- The buyer can choose to pay using any one of the available payment gateway and purchase the subscription.

- When the time for the subscription renewal is nearing, the renewal order will be created, based on the day(s) set in **SUMO Subscriptions -> Settings -> General Settings -> Renewal Order Settings -> Create Renewal Order**
- **Example:** If the subscription duration is 5 days and **Create Renewal Order** option is set as 1, then the renewal order for the subscription will be created on the 4th day.
- An invoice email will be sent to the subscribed user with a link to pay for the subscription's renewal
- The payment reminder notification email will be sent based on the number of days set as comma separated values in the **SUMO Subscriptions -> Settings -> Notification Email Settings -> Reminder Notification by Email** option.

Example:

1. If the subscription duration is 5 days and **Reminder Notification by Email** option is set as 1,2,3 then the payment remind notification email will be sent on 3,2,1 day(s) before subscription renewal. Users can pay their subscriptions by clicking the payment option provided in the Invoice mail.
2. If the subscription duration is 4 days and **Reminder Notification by Email** option is set as 1,2,3,4,5 and **Create Renewal Order** is set as 4, then the renewal order will be created 4 days before subscription renewal, then the payment reminder notification email will be sent on the 4th,3rd,2nd,1st days before subscription renewal. The remaining number of days will be neglected based upon the subscription product plan.

MANUAL SUBSCRIPTION RENEWAL

- For subscription renewal, an Invoice email along with payment link will be sent to the subscriber.
- The subscriber will have make the payment by clicking the link provided in the invoice email.
- Once the payment has been made and received, the subscription will be renewed.

CHARGING SUBSCRIPTION RENEWAL PAYMENTS IN MANUAL PAYMENT

- The payment remainder notification emails will be sent to the subscriber.
- The subscriber can make the payment using any one of the available payment gateways the subscription will be renewed once the payment has been made and received.
- If the payment is not made/received, the subscription will become **Overdue**.

CHANGE IN STATUS OF SUBSCRIPTION TO OVERDUE IN MANUAL SUBSCRIPTION RENEWAL

- When the subscription becomes **Overdue**, the subscription will remain in that status for a specific duration, the subscriber will still have access to the subscription.
- The duration of the subscription overdue can be customized in **SUMO Subscriptions -> Settings -> Notification Email Settings -> Overdue Notification by Email**
- An invoice email along with the link to make the payment for subscription renewal will be sent to the subscriber.
- The subscriber can renew the subscription by making the payment using the link provided in the Invoice email.
- If the subscriber makes the payment by clicking the link, using any one of the available payment gateways, the subscription will be changed to **Manual Payment Mode**.
- If the subscriber makes the payment by clicking the link, using any Automatic Payment gateways, the subscription will become Active, and the subscription renewal will be automatically handled by subscription system.
- If the payment is not made within the overdue period, subscription will become **Suspend**.

CHANGE IN STATUS OF SUBSCRIPTION TO SUSPEND IN MANUAL SUBSCRIPTION RENEWAL

- When the subscription becomes **Suspend**, the subscription will remain in that status for a specific duration, during this period the Subscriber **will not have access to the Subscription**.
- The Duration of the Subscription Suspend can be customized in **SUMO Subscriptions -> Settings -> Notification Email Settings -> Suspend Notification by Email**
- An invoice email will be sent to subscriber, along with a link to make the payment for subscription renewal.
- The subscriber can renew the subscription renewal by making the payment using the link provided in the email.
- If the subscriber makes the payment by clicking the link, using any one of the available payment gateways, the subscription will become active and the subscription will be changed to **Manual Payment Mode**.
- If the subscriber makes the payment by clicking the link, using any Automatic Payment gateways, the subscription will become Active, and the subscription renewal will be automatically handled by subscription system.
- If the payment is not made within the suspended period, the subscription will become **Cancelled**.

CHANGE IN STATUS OF SUBSCRIPTION TO CANCELLED IN MANUAL SUBSCRIPTION RENEWAL

- When the subscription becomes **Cancelled**, the subscriber will not have access to the subscription.
- The Payment reminder emails will not be sent.

MANUAL CANCELLATION OF THE SUBSCRIPTION BY THE SUBSCRIBER

- If the subscriber cancels the subscription, the subscriber will not be able to access the subscription.
- If the subscription was on automatic mode, renewal orders will not be created, the subscription system will not attempt to charge for the subscription.
- If the subscription was on manual mode, renewal orders will not be created, and invoice emails will not be sent
- The subscription cannot be changed to active

MANUAL PAUSING OF THE SUBSCRIPTION BY THE SUBSCRIBER

- If the subscriber pauses the subscription, the subscriber will not be able to access the subscription.
- If the subscription is on automatic mode, renewal orders will not be created, the subscription system will not attempt to charge for the subscription
- If the subscription was on manual mode, renewal orders will not be created, and invoice emails will not be sent.

MANUAL RESUMING OF THE SUBSCRIPTION BY THE SUBSCRIBER

- Once the subscription is resumed, the subscriber will have access to the subscription.
- If the subscription is on automatic mode, renewal orders will be created, the subscription system will attempt to charge for the subscription.
- If the subscription is on manual mode, renewal orders will be created, and invoice emails will be sent.

EXPIRED SUBSCRIPTION

- When a subscription has been expired, the subscriber will not be able to access the subscription

- If the subscription was on automatic payment mode, the preapproval key will be invalidated.

LIMIT NUMBER OF ACTIVE SUBSCRIPTIONS FOR EACH SUBSCRIBER

- By default, a subscriber can purchase any number of subscriptions, any quantity of a subscription in the site.
- If you want to provide a restriction in number of active subscriptions for each subscriber, go to **SUMO Subscriptions -> Settings -> General -> Limit/Restriction Settings -> Limit Subscription for each Subscriber**
- If **One Active Subscription per Product** is chosen, the subscriber will be allowed to purchase only one quantity of the subscription. The subscriber will not be allowed to purchase an already active Subscription.
- If **One Active Subscription throughout the Site is chosen**, the subscriber will not be allowed to purchase any other subscription in the site, when a subscription is already active.

LIMIT NUMBER OF TRIALS FOR EACH SUBSCRIBER

- By default, a subscriber can use the trial feature for a subscription product any number of times, A subscriber can use the trial feature for all the products in the site.
- If you want to provide a restriction in trial access for subscriptions, go to **SUMO Subscriptions -> Settings -> General -> Limit/Restriction Settings -> Limit Trial for each Subscriber**
- If **One Active Trial per Product** is chosen, the subscriber will be allowed to use the trial feature for a product only once. If the subscriber tries to purchase the same subscription product once again, they will have to pay the full subscription price.
- If **One Active Trial throughout the Site** is chosen, the subscriber will be allowed to use the trial feature on the site only once. If the subscriber tries to purchase the same subscription product, or any other subscription product which has trial enabled, they will have to pay the full subscription price.

CONFIGURING SUMO SUBSCRIPTION TO HANDLE ORDER SUBSCRIPTION

- Go to **SUMO Subscriptions -> Settings -> Order Subscription -> Enable Order Subscription**.
- Choose **Subscription Duration, Subscription Duration Value** and subscription recurring in **Recurring Cycle** options.

- When **Checkout State** option is Checked, then by default Order Level Subscription is Enabled on checkout and when it is Unchecked then the subscriber can choose Order Level Subscription on checkout.
- This Subscription cannot be limited to number of Active subscriptions for each subscriber.

MANAGE SUBSCRIPTIONS FROM ADMIN DASHBOARD

- A Subscription can be in any one of the status
 - When a subscription has been purchased, a unique number will be associated with the subscription
 - All the subscriptions purchased from the site will be listed
 - To manage the subscriptions go to, **SUMO Subscriptions -> List of Subscriptions**
1. **Pending** – subscription has been purchased and the initial payment is not yet received.
 2. **Trial** – subscription is currently in the trial period
 3. **Active** – subscription is currently active
 4. **Overdue** – subscription renewal payment is not made/received
 5. **Cancelled** – subscription has been cancelled by the subscriber/admin
 6. **Suspended** – subscription renewal payment is not made within the overdue duration
 7. **Failed** – when the user is not able to make the payment or the subscription system is not able to charge the subscription renewal payments
 8. **Paused** – subscription has been paused by the subscriber/admin
 9. **Expired** – subscription has been expired
- The subscriptions can be sorted based on the following
1. **Status**
 2. **Subscription Number**
 3. **Order Id**
 4. **Subscription Start Date**
 5. **Subscription End Date**
- A subscription will be considered inactive, if its current subscription status is not active.
 - The site admin can **Pause/Cancel** an active subscription or **Cancel** an inactive subscription inside the edit subscription page.
 - The site admin can modify the renewal price for the subscription.
 - The subscription product Information can be viewed
 - The log history of the subscription events will be displayed in different background colors.
 - The site admin can delete all the subscriptions at once using the **Bulk Actions** option.

EMAILS SENT FROM SUBSCRIPTION SYSTEM

Subscription system will send emails to the user/site admin. These email templates can be found in **WooCommerce -> Settings -> Emails**

The List of Emails which can be Sent are

- **Subscription New Order** → can be sent to the buyer when the subscription has been purchased.
- **Subscription Processing Order** → can be sent to the buyer when the order status of the currently purchased subscription is processing.
- **Subscription Completed Order** → can be sent to the buyer when the order status of the currently purchased subscription is completed.
- **Subscription Invoice - Manual** → can be sent to the buyer with a link to make the payment, when the subscription has to be renewed in manual mode.
- **Subscription Subscription Renewal to Manual Subscription Renewal** → can be sent to the buyer notifying the buyer to add funds to the account and a link to make the payment, when the subscription has to be renewed in automatic mode.
- **Automatic Subscription Renewal to Manual Subscription Renewal** → This email will be sent when the Subscription System is unable to charge for Subscription renewal within Suspend status and Subscription is changed to Manual payment mode.
- **Subscription Renewed Order** -- Automatic emails are sent to the customers when the automatic subscription is Successfully.
- **Subscription Payment Overdue - Manual** → can be sent to the buyer when the subscription is in the overdue status in manual mode.
- **Subscription Payment Overdue - Automatic** → can be sent to the buyer when the subscription is in the overdue status in automatic mode.
- **Subscription Suspended - Manual** → can be sent to the buyer when the subscription is in the suspend status in manual mode.
- **Subscription Suspended - Automatic** → can be sent to the buyer when the subscription is in the suspend status in automatic mode.
- **Subscription Paused** → can be sent to the subscriber, if the subscription has been paused.
- **Subscription Cancelled** → can be sent to the subscriber, if the subscription has been cancelled.
- **Subscription Expired** → can be sent to the subscriber, if the subscription has been expired.

PLUGIN SETTINGS

RENEWAL ORDER SETTINGS

Go to **SUMO Subscriptions -> Settings -> General -> Renewal Order Settings**

- **Create Renewal Order** → how many days prior to subscription renewal date, the renewal orders has to be created.
 - **Note:** The number of days should be lesser than the subscription duration.
 - **Note:** If the value is left empty or 0 is entered, then the renewal orders will be created on the subscription renewal date
- **Include Shipping Costs in Renewal Order** → whether the initial shipping cost has to be included in the renewal order
 - **Charge Shipping Cost only during Renewals of Subscriptions when Subtotal is 0** - If enabled, shipping cost will be charged only in the renewals of the subscription when the subtotal is zero. Subtotal will be zero only when the Subscriptions in the cart has either **Free Trial** or **Free payment** is applied for Synchronized periods.
- **Include Tax Costs in Renewal Order** → whether the initial tax cost has to be included in the renewal order
- **Apply Coupon Code Discount in Renewal Order** → if you wish to give the discount of used coupon in parent order for all the renewal orders, then enable this option.
- **Coupon Code Discount in Renewal Order applicable for** → if you want to restrict the discount for renewal order only for specific User(s)/User Role(s), then make use of this option.
- **Number of Renewal(s) to Apply Coupon Code Discount** → if you want to restrict the discount for renewal order only for specific number of renewals, then select Fixed Renewal(s) in this option.
 - **Number of Times Apply Coupon Code Discount in Renewal Order** → Set the renewal count to apply coupon code discount in this field.

RENEWAL ORDER EMAIL NOTIFICATION SETTINGS

Go to **SUMO Subscriptions -> Settings -> General -> Renewal Order Email Notification Settings**

- **Send Payment Reminder Email - Manual/Automatic** → how many days prior to subscription renewal date, the payment reminder email notifications has to be sent.
- Multiple payment reminder email notifications can be sent. The days on which the payment reminder email notifications has to be sent has to be separated by a comma. In case of Manual reminder email, Pay link will be sent in order to make the renewal

and in case of Automatic, email will be sent in order to add sufficient funds in their account

Note :

- The number of days should be lesser than **Create Renewal Order** days
- If left empty or 0, the payment reminder notification email will be sent on the subscription renewal date.

OVERDUE AND SUSPEND SETTINGS

Go to **SUMO Subscriptions -> Settings -> General -> Overdue and Suspend Settings**

- **Overdue Period** → how long the subscription needs to be in Overdue status can be configured here. If set as 0 then, the subscription will go to Suspend status.
- **Suspend Period** → how long the subscription needs to be in Suspend status can be configured here. If set as 0 then, the subscription will go to Cancelled status.

Note: If both Overdue and Suspend Period is set as 0, then without going to Overdue and Suspend status, subscription will be Cancelled

LIMIT/RESTRICTION SETTINGS

Go to **SUMO Subscriptions -> Settings -> General -> Limit/Restriction Settings**

Mixed Checkout → if enabled, user can purchase subscription products along with non-subscription products in a single checkout.

Limit Subscription for each Subscriber → restrict the user by

- **No Restriction** – buyer can purchase any quantity of the same product, the same product can be purchased multiple times when the product is already active.
- **One Active Subscription Per Product** – buyer will be allowed to purchase only one quantity of the subscription product, Buyer cannot purchase the same product, if the subscription product has already been purchased and active. The buyer can buy the subscription product only after the subscription is **Cancelled** or **Expired**.
- **One Active subscription Throughout the Site** - buyer will be allowed to purchase only one quantity of the subscription product, buyer cannot purchase any other subscription product in the site, if a subscription product has already been purchased and active. The buyer can buy other subscription product only after the active subscription is **Cancelled** or **Expired**.

Limit Trial for each Subscriber → restrict the user by

- **No Restriction** – buyer can use the trial feature for the same product multiple times.
- **One Trial Per Product** – buyer will be allowed to use the trial feature for a subscription product only once. buyer cannot use the trial feature the same product once again, If the buyer tries to purchase the same subscription product again, the buyer will have to pay the full subscription amount.
- **One Trial Throughout the Site** - buyer will be allowed to use the trial feature for a subscription product only once. Buyer cannot use the trial feature for any other subscription product, If the buyer tries to purchase any other subscription product with trial enabled, the buyer will have to pay the full subscription amount.

Limit Variable subscription Products at → customize where to apply the restriction for variable products. i.e. from Product Level or else from Variant Level.

PAYMENT GATEWAY SETTINGS

Go to **SUMO Subscriptions -> Settings -> General -> Payment Gateway Settings**

- **Accept Manual Payment Gateways** → If enabled, manual payment gateways(which are enabled in (WooCommerce -> Settings -> Checkout) will be displayed along with automatic payment gateways in checkout page when subscription product is added in cart.
- **Disable Automatic Payment Gateways** → If enabled, automatic payment gateways will be hidden in checkout page.
- **Remove the option for the Subscriber to choose Automatic/Manual Subscription Renewal** → if enabled, the option for the user to choose to preapprove future payments will not be visible and the user will be forced to preapprove the future payments or the payment will be considered as a manual payment based on the option selected in **Force Automatic/Manual Payment**.
- **Enable Paypal Standard Subscription API** → if enabled, PayPal subscription API will be activated and if subscriber chooses to pay using PayPal payment gateway and PayPal will manage with the subscription renewal.

MY ACCOUNT PAGE SETTINGS

In this section, you can allow your subscribers to use the features such as subscription pause, subscription cancel, subscription switching, etc. If you allow the features then, options will be displayed for the subscribers on their My Account Page in order to make use of the features.

Go to **SUMO Subscriptions -> Settings -> My Account -> My Account Page Settings**

- **Allow Subscribers to Pause their Subscriptions** → if enabled, display the option of pausing the subscription for the subscriber.
- **Allow Subscribers to Cancel their Subscriptions** → if enabled, display the option of cancelling the subscription for the subscriber.
 - **Allow Subscribers to Cancel their Subscriptions after** → here you can set the minimum number of days the subscriber needs to wait in order to cancel the subscription. During the waiting period, Cancel button will not be displayed in My Account page. If left empty or set as 0 then, the button will be displayed instantly.
 - **Product/Category Filter** → here you can select specific products/categories to allow cancel options for the subscribers
 - **All subscription product(s)** → by default, this option will be selected which means cancel feature will be allowed for all subscription products
 - **Included subscription product(s)** → if this option is selected, you can limit the cancel feature for specific subscription products
 - **Excluded subscription product(s)** → if this option is selected, you can exclude some of the subscription products from allowing cancel feature.
 - **All subscription categories** → if this option is selected then, cancel feature will be allowed for all subscription products which are associated in any of the available categories
 - **Included subscription categories** → if this option is selected then, you can limit the cancel feature for subscription products under specific categories
 - **Excluded subscription categories** → if this option is selected then, you can exclude subscription products from specific categories from allowing cancel feature
 - **User/Userrole Filter** → here you can select specific user/userroles to allow cancel options for the subscribers
 - **All users** → by default, this option will be selected which means cancel feature will be allowed for all the subscribers
 - **Include user(s)** → if this option is selected, you can allow selected subscribers from using the cancel feature
 - **Exclude user(s)** → if this option is selected, you can exclude selected subscribers from using the cancel feature
 - **Include userrole(s)** → if this option is selected, you can allow subscribers of specific userroles from using the cancel feature
 - **Exclude userrole(s)** → if this option is selected, you can exclude subscribers of specific userroles from using the cancel feature

- **Cancel Options that should be available to the Subscriber** → SUMO
Subscriptions supports 3 types of cancelling options. The options selected here will be displayed for the subscribers
 - **Cancel immediately** → by default, this option only will be selected so that subscribers can cancel their subscription immediately. If the subscriber selects this option then, their subscription will be cancelled instantly.
 - **Cancel at the end of billing cycle** → if you have selected this option, then if the subscriber selects this option, the subscription will be cancelled at the end of current billing cycle which means no future renewals will happen for their subscriptions.
 - **Cancel on a scheduled date** → if you have selected this option, then if the subscriber selects this option, they can select a specific date during the current billing cycle in order to cancel their subscription. Until the scheduled date, they will have access to the subscription.
- **Allow Switching between Variations of a Variable Subscription Product** → if enabled, the subscriber can switch between any Variations of the same variable subscription product. Once the option is enabled, subscribers can switch the variation by clicking Switch Variation button of the respective variable subscription product in **My Subscriptions** section under **My Account** page.
 - **Note:** For switching, the variation of the variable subscription product which the user wish to switch must be with same Price and same Subscription settings(Subscription Duration, Subscription Duration Value, Trial Period, Sign up Fee, Recurring Cycle, Synchronize Renewals) at the time of switching.
- **Allow Subscribers to Resubscribe** → if enabled, subscribers can resubscribe for their expired/cancelled subscription with the same settings even if the settings(price, duration,etc) is changed
 - **Hide Resubscribe Button when** →if left empty, then resubscribe button will be displayed for expired/cancelled subscriptions. If any of the given option is selected then resubscribe button will be displayed for specific cases only.
- **Allow Subscribers to Turn Off Automatic Payments** → if enabled, in case if the subscriber has enabled automatic subscription renewals, they can turn off the automatic renewal from their My Account page. If subscriber turned off then, manual payment mode will be processed and payment reminder emails will be sent based on the settings.
- **Allow Subscribers to Change the Shipping Address** → if enabled, subscribers are allowed to edit their shipping address so that the new shipping address will be taken care for further renewals of the subscriptions.

DOWNLOADABLE PRODUCTS SETTINGS

By default, for downloadable subscription products, if a subscriber subscribes for the product then when the site admin links additional files to the product, already subscribed subscribers can download the newly added files from Download section from My Account page. This behavior can be controlled.

Go to **SUMO Subscriptions -> Settings -> My Account -> Downloadable Product Settings**

- **Content Dripping** → if enabled, when a new file is added to the downloadable subscription product, the already subscribed subscribers can't see the newly added files. It will be displayed only when the renewal of the subscription is completed for the product.

ADDITIONAL DIGITAL DOWNLOADS SETTINGS

You can link additional products(Downloadable Products) with Subscription Products as a Complementary to the Subscribers for Subscribing to the Product.

To Enable it, go to **SUMO Subscriptions -> Settings -> My Account -> Additional Digital Downloads Settings**

- **Enable Additional Digital Downloads for Subscription Products** → if enabled, Enable Additional Digital Downloads checkbox will be visible in Product backend settings page so that if enabled you can add the Downloadable products which need to be linked to the Subscription Product.

SYNCHRONIZATION SETTINGS

Go to **SUMO Subscriptions -> Settings -> Synchronization -> Synchronization Settings**

- **Enable Synchronization for Subscription Product** → if enabled, Synchronization option will be displayed in Product backend of SUMO Subscriptions Enabled products.
- **Show Synchronized Next Payment Date in Single Product Page** → if enabled, next payment date for the respective Subscription product will be displayed in single product page.
- **Payment for Synchronized Period -**
 - **Free**→if selected, if the Subscription is a 1 week subscription with a Subscription charge of \$70 and Synchronization is set to be on Wednesday each week, then if a customer subscribes for the product on Sunday, the initial subscription charge for Sunday, Monday and Tuesday will be charged as

\$0(free) and for the renewal of the subscription, \$70 will be charged from the user.

- **Full Subscription Fee** →if selected, initial subscription charge and renewal of the subscription charges will always be charged as full subscription fee.
- **Prorate Payment** →
 - if selected, for Synchronized products price will be calculated in Prorate Payment. For example, if the Subscription is a 1 week subscription with a Subscription charge of \$70 and Synchronization is set to be on Wednesday each week, then if a customer subscribes for the product on Sunday, the initial subscription charge will be taken for Sunday, Monday and Tuesday. Hence the initial charge will be \$30($70/7$ days = 10 for 1 day). For the renewal of the subscription, \$70 will be charged from the user.
 - **Prorate Payment for** → this option will be displayed when **Prorate Payment** option is selected. Choose whether the Prorate Payment need to be calculated for **All Subscription Products** or else only for **All Virtual Subscriptions**.
 - **Prorate Payment on** → this option will be displayed when **Prorate Payment** option is selected. Choose whether the Prorate payment need to be charged in **First Recurring** or else in **First Payment**.

Note:

1. Prorate Payment will not be calculated if **Trial** is enabled for the Subscription Product.
2. Prorate charge of the respective subscription product will be displayed in Cart Page if **First Payment** option is chosen as **Prorate Payment on**.
3. You can customize the message for Synchronization in **SUMO Subscriptions -> Settings -> Messages -> Synchronization Message Settings**. Synchronization Message will be displayed after Subscription Message in Single Product Page which can be customized in **Synchronization Plan Message** field. You can use the shortcode **[sumo_synchronized_next_payment_date]** to display the next payment date in this field.
4. You can customize the message for Prorate which will be displayed in Cart Page in **SUMO Subscriptions -> Settings -> Messages -> Synchronization Message Settings**.
5. If you have chosen **Prorate Payment on** as **First Recurring**, then the message which is given in **Prorated Amount Message during First Renewal** field will be displayed in Cart Page. If you have chosen it as **First Payment**, then **Prorated Amount Message during First Payment** field will be displayed in Cart Page.

ORDER SUBSCRIPTION SETTINGS

Go to **SUMO Subscriptions -> Settings -> Order Subscription -> Order Subscription Settings**

- **Enable Order Subscription as a Single Subscription** → if enabled, Order Subscription feature will be enabled.
- **Order Subscription Duration is chosen by** → if **Admin** is selected, then duration which admin sets in **Subscription Duration, Subscription Duration Value** and **Recurring Cycle** will be considered for Order Subscription. If **User** is selected, then when the User enables the Order Subscription checkbox, they will be asked to choose the duration.
- **Enable Order Subscription Checkbox in Checkout Page** → if this option is enabled, then by default Order Subscription checkbox will be in Enable mode in checkout page.

Note: Order subscription will not be applicable if the Cart contains Subscription Product or Membership Plan Access Product(from SUMO Memberships plugin).

UPGRADE/DOWNGRADE SETTINGS

Go to **SUMO Subscriptions** → **Settings** → **Upgrade/Downgrade** → **Upgrade/Downgrade Settings**

- **Allow Upgrade/Downgrade** → if enabled, customers can able to Upgrade/Downgrade/Crossgrade their subscription products
- **Allow Upgrade/Downgrade Between**
 - **Subscription Variations** → select this option if you want to allow upgrade/downgrade between variations of variable subscription products
 - **Grouped Subscriptions** → select this option if you want to allow upgrade/downgrade between subscription products in a grouped subscription product
- **Prorate Recurring Payment** → if you want to prorate the gap payment select whether Upgrades/Downgrades of subscriptions(virtual/all) has to be prorated
- **Charge Sign Up Fee** → select how sign up fee has to be charged while switching the subscription.
 - **Do Not Charge** → if this option is selected, Sign Up Fee will not be charged for switched subscription.
 - **Charge Gap Sign Up Fee** → if this option is selected, the difference in Sign Up Fee will be charged from the user
 - **Charge Full Sign Up Fee** → if this option is selected, full Sign Up Fee for the switched subscription will be charged from the user
 - **Prorate Subscription Recurring Cycle** → by default, recurring cycle for the switched subscription will be set as the Recurring Cycle of new subscription. If you want to Prorate the Recurring Cycle, then select the subscription products(virtual/all) which you want to prorate
- **Upgrade/Downgrade Button Text** → Set the label for the Upgrade/Downgrade button which will be displayed in My Account Page

ADVANCED SETTINGS

SUMO Subscriptions -> Settings -> Advanced -> Advanced Settings

- **Set Subscription Product as Regular Product for Specific Userrole(s)** → Here you can set the rules for displaying subscription product(s) as regular product(s) for specific userrole(s). You can't add membership plan accessible subscription product(s) created using **SUMO Memberships** plugin here.
- **Date and Time Format**→If "**WordPress Format**" is selected then, Subscription date and time will be displayed based upon the option selected in WordPress.
- **Show Payment Gateways if the Subscription Order Amount is 0** →If enabled, payment gateways will be displayed in checkout page even if the order amount is 0

when the cart contains subscription product. In case of automatic payments, subscriber doesn't need to visit the site during payment renewals if this option is enabled. **Note:** This settings not applicable for **PayPal Adaptive** payment gateway.

- **Renewal Order Delay Time** → when a renewal order has to be created, the creation of the renewal order will be delayed for the x number of minutes specified. This is to avoid confusion in sending subscription renewal emails to subscribers, when the subscription duration is less.
- **Example:** If the subscription duration is 1 day, the **Create Renewal Order** is set to 1 day, **Remainder Notification by Email** is set to 1 day, the behaviour will be as follows.
 1. Buyer purchases the subscription product, the subscription will become active once the payment is received.
 2. Payment remainder email will be sent immediately after purchasing the subscription because, the renewal order is created immediately as soon as the subscription has been purchased.
 3. This causes a confusion. If **Renewal Order Delay Time** is set to 10 minutes, the renewal order will be created only after 10 minutes of the subscription being purchased.
 4. The email will be sent only after the order being created.
- **Number of Attempts to charge Automatic Payment during Overdue status** → the number of times, the subscription system should attempt to charge for the subscription renewal payments when subscription is in overdue status.
- **Number of Attempts to charge Automatic Payment during Suspend status** → the number of times, the subscription system should attempt to charge for the subscription renewal payments when subscription is in suspend status.

SUMO Subscriptions -> Settings -> Advanced -> Automatic Payment Failure-Preapproval Access Revoked

- **When Subscriber revokes access to Preapproval Key/Billing ID (PayPal Adaptive Payment, Paypal Reference Transactions) then (or) When Subscriber revokes access to Preapproval Key/Billing ID (PayPal Adaptive Payment, Paypal Reference Transactions, SUMO Reward Points Payment) then**(when SUMO Reward Points plugin is activated) → change the subscription to cancel or let the subscribers choose other payment gateway when automatic payment is failed
- **Maximum Waiting Time During Manual Payment Mode(Preapproval Access Revoked) Before Subscription becomes Cancelled** → this option will be displayed when the above option is selected as Proceed with manual payment. Here you can set the number of days to be in last known status before the subscription becomes cancelled.
- **Send Payment Reminder Email During Waiting Time** → here you can set the day which payment reminder email need to be sent. If it is set as 1,2,3 then, email will be sent before 3rd day, 2nd day and 1st day of the waiting period.

SUMO Subscriptions -> Settings -> Advanced -> Automatic Payment Failure-Charging Not Successful

- **When Automatic Subscription goes to Cancel because of failed Payment, then** → change the subscription to cancel or let the subscribers choose other payment gateway when the subscription system is not able to fetch the payment in **Automatic Mode**.
- **Maximum Waiting Time During Manual Payment Mode(Charging Not Successful) Before Subscription becomes Cancelled** → this option will be displayed when the above option is selected as Proceed with manual payment. Here you can set the number of days to be in last known status before the subscription becomes cancelled.
- **Send Payment Reminder Email During Waiting Time** → here you can set the day which payment reminder email need to be sent. If it is set as 1,2,3 then, email will be sent before 3rd day, 2nd day and 1st day of the waiting period.

CAUTION AND TROUBLESHOOTING

API credentials are needed in order for subscriptions to work properly. If API credentials are not entered, the active subscriptions cannot be suspended or cancelled.

- IPN message notifications has to be enabled in the site admin PayPal account. If the IPN hasn't been enabled in the site admin's PayPal account the current status of the subscription product can't be retrieved.
- PayPal will not be able to send IPN notifications to the website, if the Website is in maintenance mode.

How to set up a Server Cron using CPanel such as HostGator

If you want to perform cron with exact timing then you can set it from your server. Steps to follow to set up real cron

1. First disable wp-cron by adding this line **define('DISABLE_WP_CRON', true);** in wp-config.php
2. Then set up the cron from your server cpanel by accessing the advanced section.
3. Select the cron jobs and add new cron job with the time interval you are interested In
4. Add the following command in command section of the Add New Cron Job.
wget -q -O - http://yourwebsite.com/wp-cron.php?doing_wp_cron >/dev/null 2>&1
5. Change **yourwebsite.com** to your website domain name for the above command.
6. Click Add New Cron Job. That's it.
7. **Note:** If you use some security plugins, those plugins might restrict this **wget** command by writing mod_rewrite rule in .htaccess file. Like this **RewriteCond %{HTTP_USER_AGENT} ^Wget [NC,OR]** Remove this line in order to make server cron work. Please keep in mind the security implications of this change.

HOOKS AND FILTERS

HOOKS

1. **sumosubscriptions_active_subscription** - Trigger after Subscription is Active
2. **sumosubscriptions_pause_subscription** - Trigger after Subscription is Paused
3. **sumosubscriptions_cancel_subscription** - Trigger after Subscription is Cancelled
4. **sumosubscriptions_admin_send_manual_subscription_email** - Trigger after Admin manually send the Subscription emails
5. **sumosubscriptions_manual_{subscription_status}_subscription** - Trigger when Subscription custom status gets updated
6. **sumosubscriptions_before_adding_renewal_order_item** - Trigger before adding subscription order item upon creating renewal order
7. **sumosubscriptions_before_adding_shipping_in_renewal_order** - Trigger before adding shipping upon creating renewal order
8. **sumosubscriptions_before_adding_discount_in_renewal_order** - Trigger before adding discount upon creating renewal order
9. **sumosubscriptions_fire_{cron_event_name}** - Trigger before Subscription Cron event gets elapsed
10. **sumosubscriptions_process_preapproval_status** - Check the Automatic Subscription Preapproval status is valid to renew the Subscription
11. **sumosubscriptions_process_preapproved_payment_transaction** - Automatically transact the renewal charges
12. **sumosubscriptions_preapproved_payment_transaction_success** - Trigger after the Subscription renewal Success
13. **sumosubscriptions_preapproved_payment_transaction_failed** - Trigger after the Subscription renewal failed
14. **sumosubscriptions_preapproved_access_is_revoked** - Trigger after the Automatic renewal access is revoked by Subscriber
15. **sumosubscriptions_email_order_details** - Display Subscription details table in Subscription email template
16. **sumosubscriptions_email_order_meta** - Add Subscription order meta in Subscription email template
17. **sumosubscriptions_before_view_subscription_table** - Trigger before View Subscription table in My Account page
18. **sumosubscriptions_after_view_subscription_table** - Trigger after View Subscription table in My Account page
19. **sumosubscriptions_checkout_update_order_meta** - Trigger when Subscription Order checkout is processing

20. **sumosubscriptions_after_new_subscriptions_added** - Trigger after new subscriptions gets placed
21. **sumosubscriptions_before_adding_new_subscriptions** - Trigger before new subscription gets placed
22. **sumosubscriptions_before_subscription_is_created** - Trigger before the subscription is created
23. **sumosubscriptions_subscription_created** - Trigger after the subscription is created

FILTERS

1. **sumosubscriptions_valid_subscription_statuses_to_become_active_subscription** - Filter the Subscription statuses to become Active Subscription
2. **sumosubscriptions_subscription_failed_statuses** - Get Subscription failed statuses
3. **sumosubscriptions_edit_subscription_page_readonly_mode** - Bool Admin can update edit subscription page html fields.
4. **sumosubscriptions_admin_can_change_subscription_statuses** - Bool Admin can update the Subscription statuses
5. **sumosubscriptions_edit_subscription_statuses** - Returns Admin editable Subscription statuses
6. **sumosubscriptions_show_cron_events_post_type_ui** - Bool to show Subscription cron events post type menu
7. **sumosubscriptions_my_subscriptions_table_title** - Alter My Subscriptions table title in My Account page
8. **sumosubscriptions_schedule_subscription_crons** - Bool whether to schedule the cron event or not
9. **sumosubscriptions_cart_product_total** - Returns subscription item total in cart
10. **sumosubscriptions_add_new_subscriptions** - Bool to add new subscriptions upon customer placing the subscription order
11. **sumosubscriptions_payment_mode_switcher_payment_gateways** - Get valid payment gateways applicable for payment mode switcher
12. **sumosubscriptions_get_payment_mode_switcher_in_payment_gateway** - Get payment mode switcher field for payment gateways
13. **sumosubscriptions_display_variation_switch_fields** - Upon displaying Subscription variation switcher
14. **sumosubscriptions_multiplication_factor** - Alter stripe multiplication factor
15. **sumosubscriptions_product_price_msg_for_subsc_fee** - Get Subscription fee in displaying subscription plan
16. **sumosubscriptions_renewal_item_total** - Alter subscription renewal order item total upon creating renewal order
17. **sumosubscriptions_alter_subscription_plan** - Get Subscription plan

18. **sumosubscriptions_alter_subscription_plan_meta** - Get Subscription plan meta
19. **sumosubscriptions_my_subscription_table_pause_action** - Bool to show Pause button to Subscriber
20. **sumosubscriptions_my_subscription_table_cancel_action** - Bool to show Cancel button to Subscriber
21. **sumosubscriptions_order_has_subscriptions** - Bool to check whether the order contains subscriptions
22. **sumosubscriptions_subscription_type** - Get the type of subscription based on customer checkout the subscription order
23. **sumosubscriptions_get_next_payment_date** - Get the subscription next payment/due date

TRANSLATION

SUMO Subscriptions Plugin is translation ready meaning you can edit the po files by which you can translate the text to any language.

The steps to do the translation are as follows. For eg let us consider translation to French.

1. Download and install [Poedit](#)
2. Open the file sumosubscriptions-> languages folder -> sumosubscriptions-fr_FR.po using Poedit.
3. Choose the Source text and set its corresponding French text in Translation Text Area.
4. Save the changes.
5. If you are using WordPress Version 3.9.13 or below, then in wp-config.php define the WPLANG as French. Syntax is define('WPLANG', 'fr_FR');
6. If you are using WordPress Version 4.0 or above, then go to WordPress dashboard -> Settings -> General and select the Site Language as French

COMPATIBLE WITH

SUMO Memberships

When a Subscription product is set to provide access to a Membership Plan, then the Membership Plan will be controlled by the Subscription.

- When a Subscription becomes Active, Membership Plan will become Active and the restricted contents can be accessed.
- When the Subscription is Renewed successfully, Membership Plan is also Renewed.

- If the Subscription is Paused by User/Site Admin, access to the Membership Plan will be stopped.
- If the Subscription is Expired, access to the Membership Plan will be stopped.
- If the Subscription is Overdue, User can access the restricted contents.
- If the Subscription is Suspended, User cannot access the restricted contents.
- If the Subscription is Cancelled by User/Site Admin, access to the Membership Plan will be stopped.

SUMO Donations

- When a Subscription Product is chosen as a Donation Product, then for every Renewal of Subscription, Donation amount will be charged as the Subscription amount.

SUMO Affiliates

- Admin can control whether to award Affiliate commission or not for the Renewal of Subscription Product.

SUMO Reward Points

- Admin can control whether to award Reward Points or not for the Renewal of Subscription Product.
- Users can buy and renew SUMO Subscription products using their Earning Points by proceeding with SUMO Reward Points Payment Gateway. Also, users can preapprove the future renewal so that renewals will happen automatically and points will be auto deducted from the User's account. Admin has the ability to Force the future renewals to be happen Automatically or else Manually when SUMO Reward Points Gateway is chosen for Payment.

Configuring SUMO Reward Points Gateway for Renewal of SUMO Subscription products

Goto **WooCommerce -> Settings -> Checkout -> SUMO Reward Points Gateway**

- By default, when a buyer chooses to pay with the SUMO Reward Points Gateway, a checkbox will be displayed along with the payment gateway which when checked, the renewals of the subscription will be automatically charged from the buyer.
- If the **Remove the option for the Subscriber to choose Automatic/Manual Reward Points Payment** option is enabled, then Force Automatic/Manual Payment option will be displayed, If you want the subscriber's to make only Automatic renewals when proceeding with SUMO Reward Points gateway, then select **Force Automatic Reward Points Payment**.
- If you want to stop the feature of automatic subscription renewals, then in **Force Automatic/Manual Payment** option choose **Force Manual Reward Points Payment**.

Note: Cumulative points for Renewal Orders will be calculated based on Redeeming Conversion Settings at the time of Renewal Order creation.

FAQ

1. Does it support simple subscriptions and variable subscriptions?

Yes, it supports both simple subscriptions and variable subscriptions.

2. Will the subscription renewal be automatic?

The subscription renewal will be automatic, if the user makes payment with any Automatic Payment gateways by preapproving the future renewal payments or admin has set to Force Automatic Payment for those gateways.

3. What happens if the subscription system is not able to charge for the automatic subscription renewal?

If the subscription system is not able to charge for the subscription renewals, the status of the subscription will become **Overdue**.

4. What happens if the subscription revokes access to preapproval key?

- When the subscriber has revoked access to preapproval key, the subscription will be cancelled by default.
- This can be customized in **SUMO Subscriptions -> Settings -> Advanced Settings -> Automatic Subscription -> When Automatic Subscription goes to Cancel because of failed Payment, then** option

HELP

If you need help please open a [Support Ticket](#)