Manage Subscriptions

You can manage subscriptions and edit options such as payment methods on behalf of the customer in the Customers page of the Admin UI. For more information about managing orders and customer accounts, see the linked guides.

View Subscriptions in Order Details

Once an order has been placed with subscription items, some basic subscription information will be displayed in the order details view of the Admin UI. However, you cannot edit the subscription details from the order view.

When viewing an order that includes subscription products at Main > Orders > Orders, additional columns in the item information will indicate whether or not the customer chose to subscribe (if not, then it was a one-time purchase) and the frequency at which they subscribed.

View Subscriptions in Customer Details

When viewing a customer’s account details at Main > Customers > Customers, there is a subscription section that shows every subscription that shopper has signed up for with some basic details such as the start date, next order date, and pricing amount. These columns are sortable and will list subscriptions in order of creation by default, with the most recently created subscription being shown first.

This section lists basic details and allows you to perform quick actions, which include the following. Some actions may not be available for all subscription statuses— for instance, a Paused subscription cannot be turned into a new order until it is reactivated.

- Search for a subscription via its Subscription Number or External ID (if applicable).
- Turn the subscription into a new order and place it immediately.
- Pause an active subscription. Note that if you have set a limit on the length of time a subscription can be paused, it will be automatically reactivated when that limit is reached if not manually reactivated or cancelled before then.
- Manually reactivate a paused subscription. This will not create a new continuity order immediately. Instead, it will retain the next order date as calculated by the original order date and frequency.
- Skip the next order. The subscription will automatically resume with the next expected order date after the skipped one, and the Next Order Date will update to reflect this.
- Cancel the subscription, in which no further orders will be sent.
* Clicking **Edit Subscription** will take you to the subscription details page, discussed in the rest of this guide.

To change the columns that are displayed in this table, expand the dropdown menu in the far right of the header. This will allow you to toggle columns on and off. For example, there is a column for External ID that is not displayed by default but can be turned on via these options if you use external identifiers in your subscription data.

All options will ask for confirmation with a pop-up, and cancelling the subscription will require you to select a reason code. The default options shown below are currently the only ones available, but the ability to customize this list via API Extension will be added in the future.

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View and Edit Subscription Details

If you click a subscription in the customer details table or select **Edit Subscription** from the actions menu, you will be redirected to a subscription details page. While you can still perform quick actions using the **Actions** dropdown in the top right, this page displays sections with more details about different aspects of the subscription that can be edited by the user.

If the subscription has been assigned an External ID via API, then that will also be displayed in the top section. However, it is not editable in the UI.
The general subscription actions you can perform include:

- Change the subscription frequency and/or the next order date. If the subscription has multiple items, then the dropdown options will only display the common frequencies between all items. For instance, if a weekly frequency is supported by Item A but not Item B then you will not be able to select a weekly frequency for that subscription.

- Update the next order only, which will create a draft of the subscription allowing you to make one-time changes that will be applied only to the next continuity order. See [Update Next Order Only](#) for more details.

- Turn the subscription into a new order and place it immediately.

- Pause an active subscription. Note that if you have [set a limit on the length of time a subscription can be paused](#), it will be automatically reactivated when that limit is reached if not manually reactivated or cancelled before then.

- Manually reactivate a paused subscription. This will not create a new continuity order immediately. Instead, it will retain the next order date as calculated by the original order date and frequency.

- Skip the next order. The subscription will automatically resume with the next expected order date after the skipped one), and the Next Order Date will update to reflect this.

- Cancel the subscription, in which no further orders will be sent.

- View the continuity order history by clicking the [Order History](#) tab next to Subscription Details.

**Errored and Failed Subscriptions**

If the subscription is Errored or Failed, then the reason for the error will be displayed in a banner at the top of the subscription details. You can still perform most of the above actions to help resolve the error such as updating the next order date, changing the shipping and payment details, adjusting line items and quantities, skipping the next order, or cancelling the subscription entirely. The only actions not supported for Errored or Failed subscriptions are Pause and Order Partial Items Now.

A [Retry](#) button will also be displayed in the top right, next to Update Next Order Only and the actions menu. Click this button to quickly re-attempt creating a new continuity order after you have resolved the issue.

**Edit Shipping and Payment Information**

In the [Shipping](#) section, you can update the shipping address. If the existing shipping method is not available, then the
system will default to the cheapest available option. If no shipping methods are available for the updated address, an error will be displayed. Recall that only STH shipping methods are supported for subscriptions.

In the **Payment** section, you can change payment method information that will persist to the customer’s subsequent orders. There can only be one payment method on a subscription at a time.

### Edit Coupons and Subscription Summary

Any coupons added in the **Add a coupon** section will apply to all continuity orders until the coupon is removed or becomes invalid. When a coupon is applied to the subscription, it will be validated and the pricing will be re-evaluated. If the subscription is later repriced again (such as when updating items) and the coupon becomes invalid, the coupon will be removed.

In the **Subscription Summary** section, you can make adjustments to the item, shipping, handling, and duty pricing totals (tax will be automatically updated by the system) which will carry over to the next continuity orders. You will be prompted to select an appeasement reason after making a pricing adjustment.

### Edit Subscription Items

In the **Subscribed Items** section, you can add or remove subscription items as well as change their quantities. This will cause a reprice on the subscription, which updates the price of continuity orders by refreshing discounts, tax, and shipping and handling charges. A reprice will also occur whenever a continuity order is created from a subscription.
If you reduce the quantity of a subscription item, you will be prompted to provide a reason for the change. If you decrease the quantity to 0, then the item will be automatically removed from the subscription. A similar pop-up will appear when you manually remove an item - you will have to select a reason for the removal, and if all items are removed then the subscription will be automatically moved to the Cancelled state.

If you attempt to add a new subscription item and the item’s possible frequencies do not include the frequency already configured on the subscription, then a pop-up will prompt you to either create a new subscription or change the frequency of the subscription. Changing the frequency will also change it for all other items already on the subscription.
The final section of the subscription details page is the **Subscription Attributes**. Here, all custom order attributes that you have configured as either "Subscription Only" or "Order and Subscription" will be displayed.

Whenever a paused subscription is reactivated, a validation check will be done to ensure that all required attributes (marked with an asterisk) are populated. If not, an error will be displayed and the subscription will not reactivate. In this case, you can update the attributes here before reactivating the subscription.

### Subscription Attributes

<table>
<thead>
<tr>
<th>Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age *</td>
<td>30</td>
</tr>
<tr>
<td>Birthdate *</td>
<td>03/03/2000</td>
</tr>
<tr>
<td>Comment</td>
<td>30</td>
</tr>
<tr>
<td>Pet's name</td>
<td>Fluffy</td>
</tr>
</tbody>
</table>

To edit these values, click **Edit** in the top right. This will open a modal that displays all attributes, so you can update multiple at once. Click **Save** once you have updated all of the values you want to change.