Manage Subscriptions

You can view and manage subscriptions through either the customer's details or the dedicated Subscriptions UI, though some basic information is also provided when viewing order details that involve subscriptions as well.

For more information about orders and customer accounts, see the linked guides.

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.

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** or clicking a subscription in the table will take you to the subscription details page.

To change the columns that are displayed in this table, expand the dropdown menu on 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.

Subscriptions UI

The dashboard at **Main** > **Subscriptions** will display all subscriptions that exist on your tenant. As in the customer subscriptions table above, you can toggle the columns that are displayed by expanding the dropdown menu on the far right of the header. Sort the list of subscriptions by clicking the Subscription Number, External ID (if applicable), Subscription Amount, Start Date, Next Order Date, or Status header.

Use the search bar to perform a quick search on the subscription number, external ID, first name, last name, or email. Expand the **Advanced** menu on the right to combine multiple keywords and search by subscription status or site. These searches return exact matches and are not case-sensitive.

Edit Subscription Details

Click a subscription from the Subscriptions UI or customer account to access its details page. General information is displayed at the top, while later sections detail the subscription's shipping, payment, items, and attribute information. If the subscription has been assigned an External ID via API, then that will also be displayed here (but will not be editable from this UI).

From the general information, you can:

- 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.
- Perform quick actions to pause, manually reactivate, skip, and cancel the subscription or turn it into a new order as described in the Customer Details section above.
- View the continuity order history by clicking the **Order History** tab.

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.

Update Fulfillment Information

If any Direct Ship items are included in the subscription, you can change their shipping method or shipping address in the **Fulfillment Information** section. If the subscription includes any Pickup items, then the primary pickup contact information will be displayed but not editable.

Select a new value from the **Shipping Method** dropdown and/or click **Change Address** to either select a different customer address or enter a new one. After updating the address, the system will default to the cheapest available option if the existing shipping method is not available for the new address. If no shipping methods are available, an error will be displayed instead.

Update Payment Information

In the **Payment** section, you can select a new payment type and method for the next continuity order. Click **Change Payment** to view a list of all available payment type options and enter the details for the customer's payment method. There can only be one payment method on a subscription at a time.

Edit Subscription Items

You can add or remove subscription items, change their quantities, or select a new fulfillment type using the drop-down menu (including changing to a different pickup location) in the **Subscribed Items** table. Any of these updates 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.

You can have a combination of Direct Ship and Pickup items in the order, but if you include at least one Direct Ship item then you must ensure that a shipping method and address are selected in the Fulfillment Information section.

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.

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.

> You cannot set the duty fees on specific items from the UI. To do so, you must use the Catalog Storefront Tax API Extension instead. If a duty amount has been set for at least one item in the subscription, then a Duty column will appear in the Subscribed Items table. If no duty amounts have been set, the column will not be visible.

Edit Subscription Attributes

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.

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.

> 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.