

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.

Order Details FlashSale Pricing									
Order Details FlashSale Pricing									
Items Ordered									
Line	Image	Code	Name	Subscribe	Frequency	Fulfillment	Amount	Qty	Line Item Total
1		Code: de_fabulous_SOAT	Shampoo	Yes	1 Month	Direct Ship	\$9.00	1	\$9.00
2		Code: WOW_Facewash_SOAT	Facewash	Yes	1 Month	Direct Ship	\$8.50	1	\$8.50

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](#).

Subscriptions

Subscription Number	Start Date	Frequency	Next Order Date	Subscription Amount	Status	
25	Jan 27 2023	15 Day	Feb 14 2023	\$65.39	Active	
24	Jan 25 2023	15 Day	Feb 11 2023	\$114.75	Active	Edit Subscription
23	Jan 25 2023	15 Day	Feb 9 2023	\$128.58	Active	Order All Items Now
22	Jan 25 2023	15 Day	Feb 9 2023	\$76.30	Active	Pause Subscription
21	Jan 24 2023	15 Day	Feb 8 2023	\$383.20	Active	Skip Subscription
20	Jan 24 2023	15 Day	Feb 8 2023	\$383.20	Active	Cancel Subscription
19	Dec 19 2022	15 Day	Feb 17 2023	\$417.03	Active	

i 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.

Cancel Subscription?

Subscription 59 will be cancelled.

Reason For Cancellation *

☒ Found Better Price

☐ Have Enough Quantity

☐ No Longer Needed

☐ Other

Nevermind

Cancel Subscription

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.

Subscriptions Search								
Subscription Number	First Name	Last Name	Email	Subscription Amount	Status	Start Date	Frequency	Next Order Date
37	John	Doe	johndoe@kibocomm...	\$54.99	Active	Jul 28 2023	15 Day	Nov 25 2023
38	Arch	Fan	archfan@kibocomm...	\$46.47	Active	Aug 30 2023	15 Day	Nov 26 2023
39	Example	Customer	example@kibocom...	\$22.58	Active	Sep 15 2023	15 Day	Nov 17 2023

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 of the page where you can perform the following actions, while later sections of the page display the subscription's shipping, payment, items, and attribute information.

- 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.

Subscription #185 Active

Subscription Details

Order History

Customer

Example Customer

Subscription Number

185

Status

Active

Update Next Order Only

Actions

Subscription Frequency

90 Day

Start Date

04/06/2022

Next Order Date

01/04/2023

Total

\$21.00



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.

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.

Shipping

Change Address

Shipping Address *

Example Customer
717 N. Harwood St.
Dallas Texas 75201 US
Home: (512) 999-1111

Shipping Method

PercentageofOrder

Payment

Change Payment

Method *

VISA CreditCard*****1111

Bill To:

Example Customer
717 N HARWOOD ST
DALLAS TX 75201-6501 US
Home: (512) 999-1111

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.

Subscribed Items

Price List Applied : FlashSale

Line	Image	Code	Name	Fulfillment	Unit Price	Quantity	Tax	Discount	Line Item Total	
1		Code: SOAT	Subscribe and One time Purchase	Direct Ship	\$10.00	<input type="text" value="1"/>	\$0.00	\$0.00	\$10.00	✕

[+ Add Item](#)

Add a coupon (Subscription, Item, or Shipping)

- For coupon codes belonging to a coupon set, manually enter (free type) the coupon code and select Apply.

Add Coupon

Apply

Subscription Summary

Edit

> Item Total	\$10.00
> Shipping	\$0.00
> Handling	\$11.00
Duty Total	\$0.00

Subscription Total \$21.00

ⓘ Changes made to the subscription may affect pricing.



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 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.

Subscribed Items

Price List Applied : FlashSale

Line	Image	Code	Name	Fulfillment	Unit Price	Quantity	Tax	Discount	Line Item Total	
1		Code: SOAT	Subscribe and One time Purchase	Direct Ship	\$10.00	1	\$0.00	\$0.00	\$10.00	✕

+ Add Item

Add a coupon (Subscription, Item, or Shipping)

- For coupon codes belonging to a coupon set, manually enter (free type) the coupon code and select Apply.

Add Coupon

Apply

Subscription Summary

Edit

> Item Total	\$10.00
> Shipping	\$0.00
> Handling	\$11.00
Duty Total	\$0.00
Subscription Total	\$21.00

ⓘ Changes made to the subscription may affect pricing.

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.

❗ Could not add item to this subscription

✕

{{Product name}}

can only be subscribed to every:

- 45 days
- 60 days
- 90 days

To proceed, select one of the options below:

☐ I'll create another subscription for this item

☒ **Change subscription frequency and add item**

Select a new frequency at which all items in this subscription will be shipped out. **This will update the frequency on the subscription and affect all items.**

Select frequency

45 Days

60 Days

90 Days

Cancel

Change Frequency and Add Item

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.



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		Edit
Name	Value	
Age *	30	
Birthdate *	03/03/2000	
Comment	30	
Pet's name	Fluffy	

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.

Edit Subscription Attributes

×

Results

Age *

30

Birthdate *

03/03/2000

You don't have the permission to edit this field on this subscription

Comment

Pets name

Fluffy

You don't have the permission to edit this field on this subscription

Attribute name

Yes

No

Cancel

Save