



Subscriptions

v 1.0

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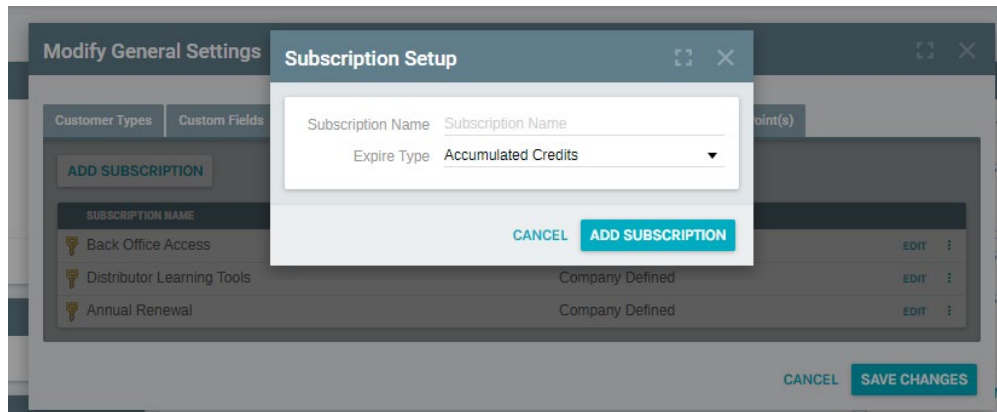
SUBSCRIPTIONS

A subscription in Exigo can be thought of as a timer. Subscriptions are used to track when a process (create new order, block access to BO, etc.) should be triggered. They are often used for managing customer website fees. Subscriptions are tied to items purchasable by a customer, subscription starts upon purchase and renews based on company defined subscription length configured on the item.

DEFINE A SUBSCRIPTION

The first step is to define your subscriptions in Exigo Admin.

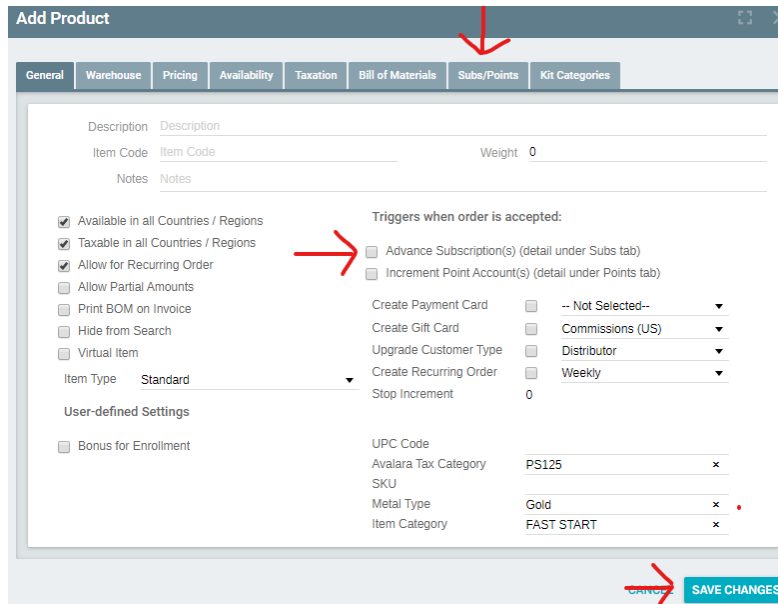
1. Navigate to Administration > Settings and click on "Modify Subscription Settings" under Subscriptions
2. Click on "Add Subscription".
3. From the Subscription Setup screen, enter the following:
 - a. Subscription Name
 - b. Expire Type – Select type:
 - i. Does not expire – subscription will never expire
 - ii. Accumulated Credits –missed months will need to be made up to reactivate subscription
 - iii. Pay Forward Credits – customer can miss months and will only get access during the month(s) the subscription is paid
 - iv. Transaction Reset – any remaining days in the subscription will be discarded when a new order adds days to the subscription.
 - c. Click on "Add Subscription" to close the Subscription Setup screen, and then save your settings.



DEFINE ITEM FOR SUBSCRIPTION PURCHASE

Next you will need to create an item, purchasable by the customer, to be used to activate or renew the subscription.

1. Go to Accounting > Items and click on "Add Item" in the upper right tool bar
2. From the New Product screen, configure all properties of the Item on all tabs of the screen.
3. Go to the General tab and select "Advance Subscription(s)"
4. Go to the "Subs/Points" tab and select the applicable subscription for this Item. An Item can apply to one or more subscriptions.
5. In the Time Adjustment field, enter the number of days the subscription will be good for when this Item is purchased. For example, a monthly subscription should show as 31 days. If you are using the Accumulated Credits method, you will want to make sure to have enough days so that there are no gaps between the months.
6. Click "Save Changes" to save your settings.



Add Product

General Warehouse Pricing Availability Taxation Bill of Materials **Subs/Points** Kit Categories

Description Description
Item Code Item Code Weight 0
Notes Notes

Available in all Countries / Regions
 Taxable in all Countries / Regions
 Allow for Recurring Order
 Allow Partial Amounts
 Print BOM on Invoice
 Hide from Search
 Virtual Item
Item Type Standard

User-defined Settings
 Bonus for Enrollment

Triggers when order is accepted:
 Advance Subscription(s) (detail under Subs tab)
 Increment Point Account(s) (detail under Points tab)
Create Payment Card -- Not Selected--
Create Gift Card Commissions (US)
Upgrade Customer Type Distributor
Create Recurring Order Weekly
Stop Increment 0

UPC Code
Avalara Tax Category PS125
SKU
Metal Type Gold
Item Category FAST START

SAVE CHANGES

USE WEB SERVICE TO MANAGE ACCESS

From <http://api.exigo.com>, you can use the web service [GetSubscription](#) to check the status of the subscription prior to allowing access.

HOW TO KEEP THE SUBSCRIPTION ACTIVE

The customer will need to purchase the item you configured for the subscription as either a one-time purchase or as a recurring order.

Once you have the subscription setup and configured, you generate a recurring order when a customer enrolls in the subscription or adds the item to the online signup as part of a signup process. Once the customer has a recurring order setup for the item that is tied to the subscription, then each time the auto order is processed, the customer's subscription will remain active.

HOW TO CHECK THE STATUS OF A SUBSCRIPTION

You can check the status of a subscription via the customer summary page in Exigo Admin. This page will show you all current and canceled recurring orders for that customer.

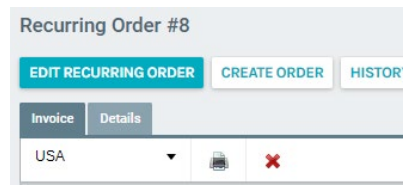
Recurring Orders						
ID	LAST	NEXT	SUBTOTAL	FREQUENCY	PAY METHOD	CCN
2	8/10/2017	11/10/2017	\$10.00	Quarterly	Primary	9696 VIEW
8	10/11/2017	10/11/2018	\$45.00	Yearly	Primary	9696 VIEW
10		3/20/2017	\$10.00	Monthly	Primary	9696 VIEW
12	10/21/2017	10/21/2018	\$5.00	Yearly	Primary	9696 VIEW
15	3/15/2017	6/15/2017	\$55.00	Monthly	Primary	9696 VIEW
18		2/6/2018	\$10.00	Yearly	Primary	9696 VIEW
19		2/14/2017	\$25.00	Monthly	Primary	9696 VIEW
20		3/1/2017	\$28.00	Monthly	Primary	9696 VIEW
21		2/24/2018	\$15.00	Yearly	Primary	9696 VIEW

[ADD NEW RECURRING ORDER](#)

Canceled Recurring Orders					
ID	LAST	SUBTOTAL	CANCELLED	BY	
9		\$5.00	10/21/2016	matthiask	VIEW
11		\$5.00	10/21/2016	matthiask	VIEW

HOW TO CANCEL A SUBSCRIPTION

From the customer summary page, click into the recurring order you wish to cancel. On the order page, click the red "x" next to the printer symbol. A pop up will appear asking you to confirm the deletion. Once confirmed the order will show under "Canceled Recurring Orders".



You can also let the subscription use up any remaining days naturally