



Subscriptions

v 1.0

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SUBSCRIPTIONS

Subscriptions can be used in Exigo to restrict access to a replicated website, access to a back office, or access to a vendor supplied product/service.

DEFINE A SUBSCRIPTION

The first step is to define the subscription that will be used.

1. Go to Administration > Settings and click on "Modify Subscription Settings" shortcut link in the Subscription section.
2. From the Customer Settings screen, go to the Subscriptions Tab.
3. Click on "Add".
4. From the Subscription Setup screen, enter the following:
 - a. Subscription Name - Determine name to be used for the subscription
 - b. Expire Type – Select type:
 - i. Does not expire – subscription will never expire
 - ii. Accumulated Credits – similar to car payments, 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 in
 - iv. Transaction Reset – any remaining days in the subscription will be discarded when a new order adds days to the subscription.
 - c. Subscription Type – Select type:
 - i. Company Defined – use for restricting access in general.
 - ii. Replicated Site – do not use, feature deprecated.
 - iii. Login Control – do not use, feature deprecated.
 - d. Click on OK to close the Subscription Setup screen and save your settings.
5. Click on OK to close the Customer Settings screen.

DEFINE ITEM FOR SUBSCRIPTION PURCHASE

Next, you will need to create a product that will be purchased by the customer in order to activate or renew the subscription.

1. Go to Accounting > Items and click on "Add" 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 "OK" to close the New Product screen and save your settings.

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 add 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 by going to the individual customer's account.

1. From the customer's portal screen, go to Subscriptions and view any subscriptions that the customer is enrolled in.
2. Click on the Subscription name and the results pane will show the activity for the order transactions that replenished the subscription.

HOW TO CANCEL A SUBSCRIPTION

1. From the customer portal, after you have clicked on Subscription, go to the top right tool bar and click on Adjust. From the popup, you can uncheck the Is active flag.
2. You can also let the subscription use up any remaining days naturally