# Subscriptions introduction

Using this feature, you can:

- View subscriptions

- Organise subscriptions

- Group orders

- View the stock level with a specific store

- Pause, resume or cancel orders

- Mark an order as unfulfillable

To view and edit subscriptions, follow these steps:

1. Login to your WebStore Manager.

2. Go to **Orders > Subscriptions.**

# Subscriptions

- One subscription is equal to one product per customer.

- Shoppers can buy multiple products and have different frequencies for each product.

- To avoid confusion, each product is treated as a single subscription.

- Subscriptions can be viewed in groups for easy viewing.

- Amazons Subscribe & Save feature lets shoppers order products based on a set interval of between 1 and 6 months.

- We offer flexibility by allowing you to set your own schedules, using different formats such as days, weeks, or months.

# Subscription filters

- Filters can help you find the subscriptions that you need to edit, review, or update.

- **Frequency**, **Ship-to State**, **Assigned Store** and **Stock Status** will only show the data that has been configured in PAM.

- The **Stock Status** filter will help you view stock levels globally and per store (multi-store).
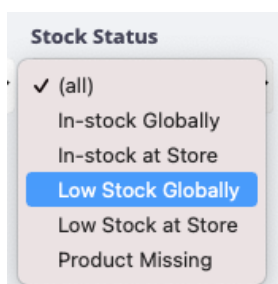


- The **Assigned Store** filter will help you handle your stock levels and plan for fulfilment (i.e using the

**Stock Status** filters)



# Subscription grouping

- If all information is the same, subscriptions can be viewed in groups.

- Grouping can help when you're looking for a specific customer or order.

- It will also help minimise the number of emails the client and shopper receive.

- You can group your subscriptions in the following ways:
  - Customer & next recurring order

  - Product & next recurring order

  - No grouping

- Grouped subscriptions can not be edited individually.

- Your customers will only see their individual order.



| | 95, 101 | Jane Doe | Feb 5, 2021 | New | Every 2 weeks | 95: Women's Cotton Cap (COTCAP) | 2.00 | 49.00 |
| | | | | | | 101: Tea Bag (TEA) | 2.00 | 10,000.00 |

# Subscription options



Using the subscription options, you can:

- Export individual or all recurring orders into CSV format

- Send emails to customers about their orders

- Substitute items

- Assign orders to specific stores

- Pause, resume or cancel orders

- Mark an order as unfulfillable

# Subscription orders

- View customer order details by clicking the order number.

| | No. | Customer | Next Recur | Status | Frequency |
|---|---|---|---|---|---|
| ☐ | 71 | John Doe | Jan 28, 2021 | New | Weekly |

- Customer orders will give you a summary of each shopper's information.

**Jane Doe — Cat Food 30 lbs**

**Product:** CATFOOD ⬈

**Quantity ordered:**

| 1.00 |

**Department:** Pets

**Category:** Cats

*Substitute Item*

**Customer:** Jane Doe (ExampleComp)⬈

**E-mail:** niamh.moore@nitrosell.net ⬈

**Phone:** 0000000000

**Address:** Merchants Quay, Cork, 0000000, Cork, Ireland

**Payment method:** *John Doe's Visaending with 1111*

**Last Emailed:** Feb 8, 2021 09:37:46

**Last Email Sent:** Item Substitution Notification

*Email Customer*

**Previous Orders**
Feb 1, 2021 - Order #1612190305

**Store, Stock & Settings**

**Status:**

| New ▾ |

**Frequency:**

| Weekly ▾ |

**Next Recur:**

| 02/02/2021 📅 |

**Last Recur:** Feb 1, 2021

**Start Date:** Feb 1, 2021

**Assigned Store:**

| (Unassigned) ▾ |

**Product status:** Online

**Global Stock:** 87.00

**Store Stock:** 0.00 ⚠ (insufficient stock)

PRODUCT PRICES (DISCOUNT INCLUDED)

**Product Price for last order:**
$19.94

**Calculated Product Price for next order:**
$19.94

**Current Discount (recalculated at next order):**
(n/a)

**Shipping Method:** UPS - UPS Ground

**Shipping Cost:**

| 5.00 | $ |

- There are two price fields:
  - **Product price for last order** – Shows how much the shopper paid for their last order.
  - **Calculated product price for next order** – If an item is substituted or altered the updated price can be seen here.

PRODUCT PRICES (DISCOUNT INCLUDED)

**Product Price for last order:**
$19.94

**Calculated Product Price for next order:**
$27.00

- Discounts are a fixed number because it gets updated on each order.
- Editing the shipping costs will update the price of the shipping method.
- You must manually email your shoppers of any changes made in the subscription orders.

Using these tools, you can:

- Export individual or all recurring orders into CSV format

- Send emails to customers about their orders

- Substitute items

- Assign orders to specific stores

- Pause, resume or cancel orders

- Mark an order as unfulfillable

To access subscription options :

1. Login to your WebStore Manager.

2. Go to **Orders > Subscriptions**.



# CSV format

- Export subscription orders to CSV format.

- Selected files will be automatically downloaded to your computer.

- You can export individual or grouped orders.

- By exporting your files to CSV, you can plan for stock levels and fulfilments.

- CSV can be helpful for organising and planning your products and stock.

- You can do this per location by using it in tandem with the **Assigned Store** dropdown menu.

# Subscription emails

- You can manually send emails to an individual or to a grouped subscription.

- Choose from the list of templates provided.
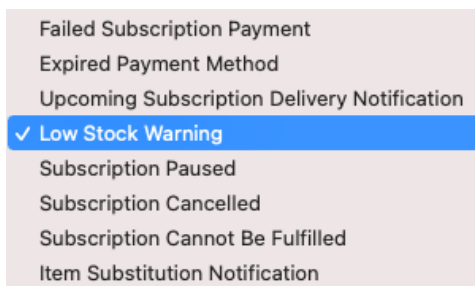


Note: You can configure all email templates in **Edit Templates**.

- Check the checkbox to display a list of all the subscriptions that were emailed.

- Your customers will receive an email with a link to manage their subscription.

Hi **Jane Doe**,

You have succssfully updated **1** of your **Subscribe and Save** order information. You have subsituted your item in the upcoming delivery.

**Your Subscriptions**

| ID | PRODUCT | SCHEDULE | NEXT ARRIVAL DATE | QTY | TOTAL |
|-----|---------|----------|-------------------|------|--------|
| 137 | Cat Food 30 lbs | Every 2 weeks | 2021-02-02 | 1.00 | $19.94 |

**Store Comments**

An item has been replaced in your upcoming delivery!

You can update your current Subscriptions at anytime.
Follow the link in the button below

MANAGE SUBSCRIPTIONS

# Substitute products

- You can replace a product that may be low in stock or unavailable for upcoming orders.

Substitute Item for 1 Subscription(s)

Search by item lookup code or product name:

cat food

CATFOOD: **Cat Food** 30 lbs

Confirm Subtitution    Cancel

- Once a product has been replaced, you must manually email the shopper about this change.

- Substituting items may affect pricing and applied discounts.

# Assign a store

- This is available to multi-stores only.

- Once a store is assigned to a subscription, the stock level will show how many products are within that store.

- You can then organise and plan for fulfilments.
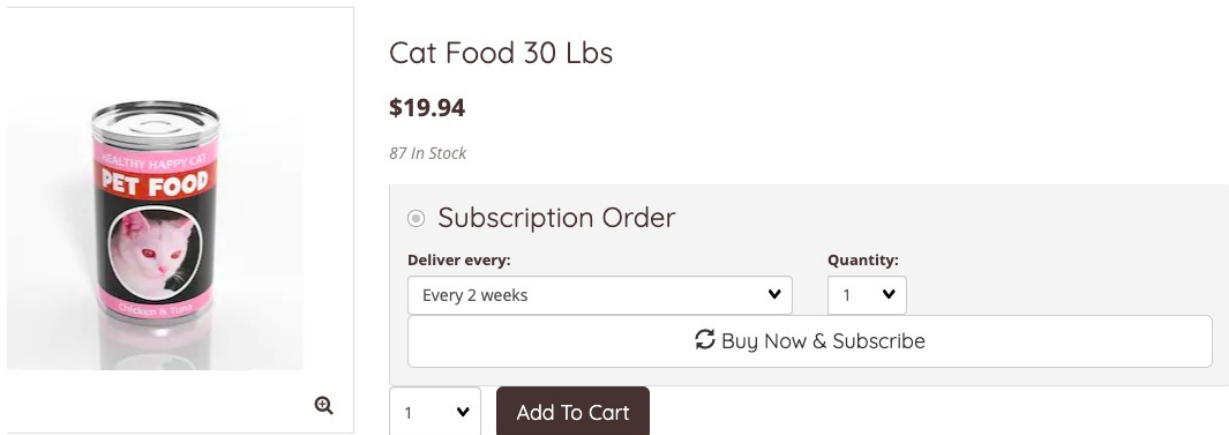


# Pause, cancel and resume subscriptions

- Pausing or cancelling a subscription will not completely remove a subscription order.

- They will be moved to the paused or cancelled section and can be reactivated at any time.

- To find paused or cancelled subscriptions, use the **Status** dropdown menu.

# Unfulfillable orders

- An order is marked as unfulfillable if it can no longer be filled for various reasons.

# Adding a subscription

- A subscription option will be available on the product page.

- Shoppers can choose how often the product will be delivered and the quantity.



- Subscriptions options will only be available for products that have been flagged for subscription.

- Subscriptions will be added to the cart as normal with a note confirming the recurring order.



- Proceed to checkout as normal.

- The shopper will receive an order summary via email.



- Customers will be required to login or create an account at the checkout.

- Shoppers will receive an error at the checkout if they attempt to create a subscription without an account.

The following errors were detected:

- You must be logged in to place a subscription.

Please fix the errors and try again.

**OK**

# My Account: My subscriptions

Customers can edit, pause or cancel their subscriptions by going to **My Account > My Subscriptions**

## Active Subscriptions

March 22, 2021

| Product | Qty | Address | Card | Actions |
|---------|-----|---------|------|---------|
| Cat Food 30 lbs | 2.00 | Jane Doe, ExampleCompany Merchants Quay Patrick Street Cork,Cork Ireland,0000000 | Visa - 1111 | ✎ Edit Subscription |

- Click **Edit Subscription**

- From there, shoppers can:
  - View their recurring orders
  - Pause or cancel a subscription
  - Substitute a product
  - Update their shipping and payment details
  - Skip to next recurring delivery

## Edit Subscription                                                    ✕

### Cat Food 30 lbs

⇄ Substitute item

▸▸ Skip next delivery

❚❚ Pause Subscription

✖ Cancel Subscription

**Shipping Address:**
Jane Doe,
ExampleComp,
Merchants Quay,
Patrick Street,
Cork, Cork
Ireland,
0000000

☑ update

**Shipping:**
Pick up in store - Pick up - $0.00

**Next Order:**
Feb 15, 2021

**Last Order:**
Feb 1, 2021

**Payment Method:**
Visa 1111

☑ update

**Quantity and Frequency:**
1.00 items will be delivered Every 2 weeks ☑ update