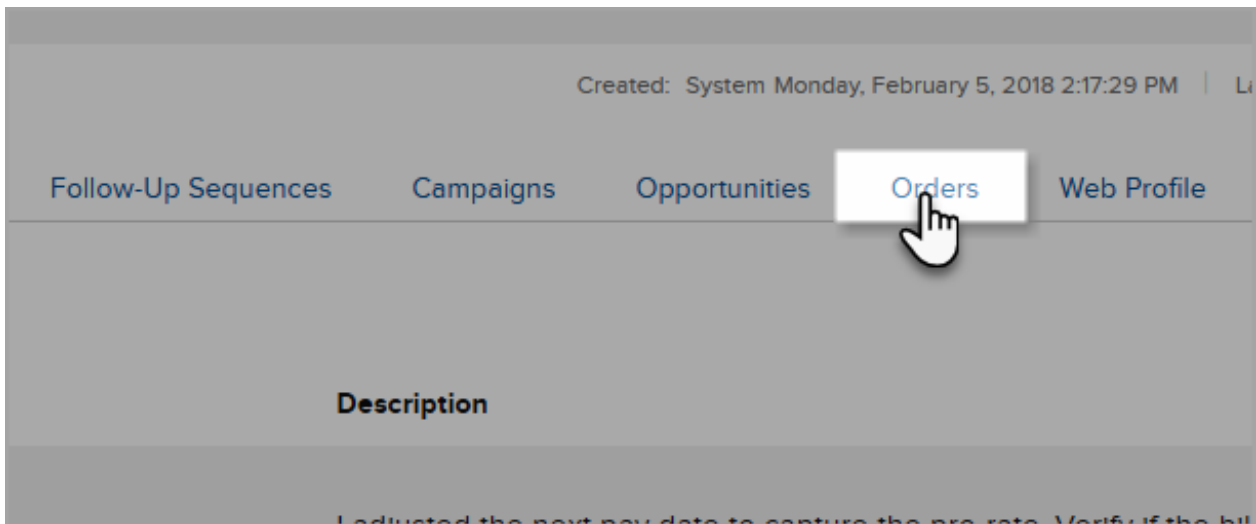


Manage your subscriptions🔗

After you create a subscription record, you can manage it from the contact's record.

Within the Contact Record click the **Orders** tab located on the bottom sections of tabs.



Scroll down to **Subscriptions**.

Subscriptions									Add Subscription	
View	Qty	Start Date	Bill Amt	Auto\$	Status	Cycle	Next Bill	Credits		
Monthly Subscription	1	4/6/2018	\$50.00	Yes	Active	Month	8/17/2018	0		
Recent Recurring Charges									More Invoices	

Column definitions:

- **View** - The name of the subscription product; click to view the subscription record.
- **QTY** - The number of items purchased.
- **Start Date** - date the subscription record was created.
- **Bill Amt** - the amount of the recurring bill.
- **Auto\$** - Indicator if the auto-pay is Active (Yes) or Inactive (No).
- **Status** - Indicator if the subscription record is Active or Inactive.
- **Cycle** - The billing cycle; e.g., daily, weekly, monthly, quarterly, annually.
- **Next Bill** - The date the next invoice will be generated. If auto-pay is active, this is also the date the payment will process.
- **Credits** - Number of credits in the subscription record.
- **Add Subscription** - click this button to manually create a subscription record.

Subscription Setup

Under the View heading, click the subscription product name.

Subscriptions

View	Qty	Start Date
Monthly Subscription	1	4/6/2018

Recent Recurring Charges

Subscription Setup

Contact [Nicole Black \(Select a different contact...\)](#)

Subscription Plan Birthday Cake ▼ month for 12 months ▼

Qty 1

Billing Cycle Every 1 Month ▼

Billing Amt 20.00 \$

Charge Tax Yes ☐ No ☒

Lead Referral Partner Lead Referral Partner Name ▼

Sale Referral Partner Sale Referral Partner Name ▼

Promo Code

Order Type Offline ▼

Invoice Template: Invoice Template ▼

Option Definitions:

- **Contact:** the customer that is attached to the subscription record.
- **Subscription Plan:** Subscription product and cycle.
- **Qty:** Amount purchased.

- **Billing Cycle:** How many times the subscription is billed during the cycle.
- **Billing Amt:** The amount billed each cycle.
- **Charge Tax (Optional):** Indicator if tax is applied to Invoice.
- **Lead Referral Partner (Optional):** Name of the referral partner to receive credit if applicable.
- **Sales Referral Partner (Optional):** Name of the referral partner to receive credit if applicable.
- **Promo Code (Optional):** Save any promo code used for a discount.
- **Order Type (Optional):** The type of order either Online or Offline.
- **Invoice Template (Optional):** Select a Legacy Template that is generated.

Current Status

Current Status


Status

Active ▼

Start Date

04-06-2018

End Date



Reason Stopped

Last Bill Date

7/17/2018

Next Bill Date

08-17-2018 [Change](#)

Next Bill Amount

\$50.00

Option Definitions:

- **Status** - Indicates if the subscription record is Active or Inactive . Subscriptions records will always be in an Active status and can only be manually changed to

Inactive. Once saved in the Inactive status no further invoices will be created or charged.

- **Start Date** - Date the subscription was created.
- **End Date** - Date the subscription stops billing. The End Date is configured when there is a **# of Cycles** in the subscription. Once the subscription reaches the **End Date** no further invoices will be generated or charged but the subscription status will remain Active.
- **Reason Stopped (Optional)** - Leave a note explaining why the subscription was canceled. If the subscription was created with a specific amount of cycles it will automatically save "Subscription ends on the above date based upon the number of cycles set. You may choose a different date as needed." in this field.
- **Last Bill Date** - Date that the last Invoice was created.
- **Next Bill Date** - Date the next Invoice will be generated.
- **Change** - Click this to change the Next Bill Date. This only allows you to change the Next Bill date within a specific time frame.
- **Next Bill Amount** - Amount that will be due on the next invoice. This will not accumulate if previous invoices were missed.

Recharge Information

Recharge Information

Auto Charge

Yes ☒ No ☐

Credit Card

Visa XXXX-8880 ▼

Add

Merchant Account

Infusionsoft Payments ▼

Max Charge Attempts

3

Any whole number greater than zero

Num Days Between Retry

2

Any whole number greater than zero

☒ Email the invoice to the customer upon successful payment

Option Definitions:

- **Auto Charge** - If Yes is selected, the credit cards will be automatically charged. If No is selected, but the subscription is in Active status and there is no End Date listed,

then an invoice will be generated and will show a balance due.

- **Credit Card** - Credit card that the subscription will bill.
- **Add** - Click the Add button to add another credit card to the subscription record.
- **Merchant Account** - The merchant that processes the credit card payment.
- **Max Charge Attempts** - Amount of times the card will be attempted after the initial payment fails.
- **Num Days Between Retry** - The amount of days between bill attempts after the initial payment fails.
- **Email the invoice to the customer upon successful payment** - If checked, an email with the invoice will be sent for each successful payment.

Add a New Credit Card

1. Click Add > Enter new card information.
2. Then click the outstanding Order Record or Invoice.
3. Click Payment Plan on the right and select the new card from the drop down.
4. Click Save.

The screenshot shows a web interface for managing subscriptions. The main form is titled 'Subscription' and includes fields for 'Sale Referral Partner', 'Promo Code', 'Order Type', and 'Invoice Template'. Below these is the 'Recharge Information' section with 'Auto Charge' (Yes/No), 'Credit Card' (Visa XXXX-6517), 'Merchant Account' (Test Merchant), 'Max Charge Attempts' (3), and 'Num Days Between Retry' (2). A checkbox for 'Email the invoice to the customer upon successful payment' is checked. A 'Save' button is at the bottom left. To the right, there is a 'Recurring Credits' table and a 'Source Information' section.

Date Created	NumCycles	CyclesDone	Amount	Edit
7/31/2018	1	0	\$50.00	[Edit]

Source Information
Tracking: No information is Available

Description	Created	Charge amt	Pay status	Pay plan status	Auto-charge	Invoice
Monthly Subscription - Every month	07-06-18	\$50.00	Unpaid	Has A Payment Plan	View Details	[Invoice #3380]
Monthly Subscription - Every month	06-06-18	\$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3220]
Monthly Subscription - Every month	05-06-18	\$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3184]
Monthly Subscription - Every month	04-06-18	\$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3000]

If the max attempts have been reached you will need to click [Reset Failed Attempts](#), unless you have E-commerce > Settings > Orders > "Reset Failed Auto Charge Attempt Counters When Credit Card Changes:" set to **Yes**.

If the max attempts have **NOT** been reached and the following is true then the payment will automatically run.

- The Auto Charge is marked Yes
- The outstanding invoices are within the time frame indicated under E-Commerce > Settings > Orders > Don't auto charge invoices that have x months been

outstanding. [Click here to see more information.](#)

*This is not immediate, but it will automatically process payment.

Updated Card

If the credit card is updated, all Invoices attached to that credit card with outstanding balances will automatically process unless the Auto Pay is marked No and/or the max attempts have been reached.

If the max attempts have been reached you will need to go into the **Invoice** > Click "[Reset Failed Attempts](#)"

If the max attempts have **NOT** been reached and the following is true then the payment will automatically run.

- The Auto Charge is marked Yes
- The outstanding invoices are within the time frame indicated under E-Commerce > Settings > Orders > Don't auto charge invoices that have x months been outstanding. [Click here to see more information.](#)

*This is not immediate, but it will automatically process payment.

Reset Failed Attempts

Payment Plan

Edit Payment Plan

Auto Charge: Yes(Has Failed) [View Payment Attempt History]

☒ Email the invoice to the customer upon successful payment

This payment plan has failed 4 times.

Pmt #	Status	AmtDue	Paid	Date
Pmt 1	Paid	\$4,900.00	\$4,900.00	11/28/2017
Pmt 2	Paid	\$2,450.00	\$2,450.00	12/28/2017
Pmt 3	Unpaid (Auto)	\$2,450.00	\$0.00	1/27/2018

Save

Save & Search

Delete

Preview Invoice

Send Invoice

Reset Failed Attempts

Clone

Past Subscription Invoices

This is located at the bottom of the subscription record.

<div>Save Delete</div>						
Description	Dt created	Charge amt	Pay status	Pay plan status	Auto-charge	Invoice
Monthly Subscription - Every month	07-06-18	\$50.00	Unpaid	Has A Payment Plan	View Details	[Invoice #3380]
Monthly Subscription - Every month	06-06-18	\$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3220]
Monthly Subscription - Every month	05-06-18	\$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3114]
Monthly Subscription - Every month	04-06-18	\$50.00	Paid	Has A Payment Plan	View Details	[Invoice #3010]

- **Description** - The subscription product and cycle. When clicked, it opens the order record.
- **Dt Created** - Date the invoice was generated.
- **Charge amt** - Amount billed.
- **Pay status** - Indicates if the invoice is paid or unpaid.
- **Pay plan status** - Indicates if a payment plan is used.
- **Auto-charge** - View Details shows the Credit Card Charge Attempt History.
- **Invoice** - Contains payments, Commissions, Payment Plan, Preview Invoice button, Send Invoice button.

How to Cancel a Subscription

Current Status

ntact...)

Status Active

Start Date 07-10-2018

End Date 08-14-2018

week for 5 weeks

Week

Reason Stopped Subscription ends on the above date

If you need to cancel a Subscription on a Specific date, enter that date in the "End Date" field and click "Save".

Current Status

Status	Active ▼
Start Date	Please select a status
End Date	Active
	Inactive

If you need to cancel a Subscription immediately do so by changing the Status to "Inactive" and click "Save"

Recharge Information

Auto Charge	Yes <input type="radio"/> No <input checked="" type="radio"/>
Credit Card	Visa XXXX-1686 ▼
Merchant Account	Test Merchant ▼
Max Charge Attempts	3

Pro Tip! Change the Auto-Pay to "No" to prevent any accidental billing if the Subscription is re-activated.

Auto Charge Settings

1

MY NAV

- Dashboard
- My Day

CRM

- Contacts
- Companies
- Opportunities
- Referral Partners
- Visitors

MARKETING

- Campaign Builder
- Email & Broadcasts
- Lead Generation
- Templates
- Legacy

E-COMMERCE

- E-Commerce Setup
- Orders
- Products
- Actions
- Promotions
- Legacy

Edit Reports Settings Reports Settings Settings

Go to E-Commerce > Settings

2

Orders

Order Settings

- Product
- Orders 3
- Quotes & Invoices
- Sales Tax

Countries

Default Country: United States

Billing

Currency Locale: US Dollar

Payment Types: Credit Card, Adjustments, Refund

Click Orders from the left and scroll down

Default Num Days Between Retries: 2

Show Payment Interface In Orders Tab Yes ☐ No ☒

Default Days To Wait Before Autocharging 2

Email receipts/invoices upon successful payment? Yes ☒ No ☐

A Reset failed autocharge attempt Yes ☒ No ☐
counters when Credit Card changes?

Don't autocharge invoices that have 12 months
been outstanding for more than:

Select "Yes" to have the failed autocharge reset when a New Credit Card is added

Default Num Days Between Retries:

2

Show Payment Interface In Orders Tab Yes ☐ No ☒

Default Days To Wait Before Autocharging

2

Email receipts/invoices upon successful payment? Yes ☒ No ☐

Reset failed autocharge attempt Yes ☒ No ☐

counters when Credit Card changes?



Don't autocharge invoices that have been outstanding for more than:

12 months

Select the time frame for Outstanding invoices