

SUMO Subscriptions – Documentation

by Fantastic Plugins

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Introduction

SUMO Subscriptions is a subscription extension for WooCommerce. Using SUMO Subscriptions, you can create and sell subscription products On your existing WooCommerce shop. SUMO Subscriptions supports simple subscription products, variable subscription products and grouped subscription products.

Minimum Requirements

The minimum server requirements and the WordPress requirements are as follows

PHP 5.2.4 or higher

MySQL 5.0 or higher

WordPress 3.4 or higher

WooCommerce 3.0 or higher

How to Install the Plugin?

1. Login to your codecanyon account
2. Go to Downloads Tab
3. You will find SUMO Subscriptions
4. Download sumosubscriptions.zip (Please note that downloaded files will always be the latest version)
5. Unzip sumosubscriptions.zip inside which you will find the Plugins files i.e. sumosubscriptions.zip and the documentation folder
6. Install SUMO Subscriptions i.e. sumosubscriptions.zip using WordPress Dashboard
7. Activate the Plugin

How to Update the Plugin?

If you are using an older version of the plugin and want to upgrade to the latest version, then please follow the steps given below:

1. Deactivate and Delete the existing version of SUMO Subscriptions plugin in your site.
2. Follow the steps given in [How to Install the Plugin?](#) section
3. Activate the plugin.

Note: You will not lose any settings, data, etc by following the above steps.

Notice Before Downgrading the plugin from V14.x to Lower Versions(V13.8 and below)

Version 14.x of SUMO Subscriptions plugin is not compatible with previous versions of the plugin(V13.8 and below). So, it is highly recommended to not downgrade the plugin.

Features Offered by this Plugin

SUMO Subscriptions - Features				
	WooCommerce PayPal Payments	WooCommerce - Stripe(Automatic)	PayPal Subscriptions API (Automatic)	Any WooCommerce Supported Payment Gateway (Manual)
Simple Product, Variable Product, Grouped Product	✓	✓	✓	✓
Trial Restriction	✓	✓	✓	✓
Quantity Restriction	✓	✓	✓	✓
Order Subscriptions	✓	✓	✓	✓
Subscription Synchronization	✓	✓	✗	✓
Subscription Switching between Identical Variations	✓	✓	✗	✓

SUMO Subscriptions - Subscription Status				
	WooCommerce PayPal Payments	WooCommerce - Stripe(Automatic)	PayPal Subscriptions API (Automatic)	Any WooCommerce Supported Payment Gateway (Manual)
Pending	✓	✓	✓	✓
Trial	✓	✓	✓	✓
Active	✓	✓	✓	✓
Pause	✓	✓	✗	✓
Overdue	✓	✓	✗	✓
Suspended	✓	✓	✓	✓
Cancelled	✓	✓	✓	✓
Failed	✓	✓	✓	✓
Expired	✓	✓	✓	✓

Two Types of Subscriptions

1. Product Level Subscription
2. Order Level Subscription

1. Product Level Subscription

In Product Level Subscription, user can choose to subscribe each product individually from the shop/category/single product page. Product Level Subscription supports Simple, Variable and Grouped products types.

2. Order Level Subscription

In Order Level Subscription, user can purchase the whole cart items as a single subscription from their cart/checkout page. Order Level Subscription supports all product types.

Note: Order Level Subscription option will be shown to user only if the cart contains non-subscription products.

Two Types of Payment Modes

1. Automatic Payment Mode
2. Manual Payment Mode

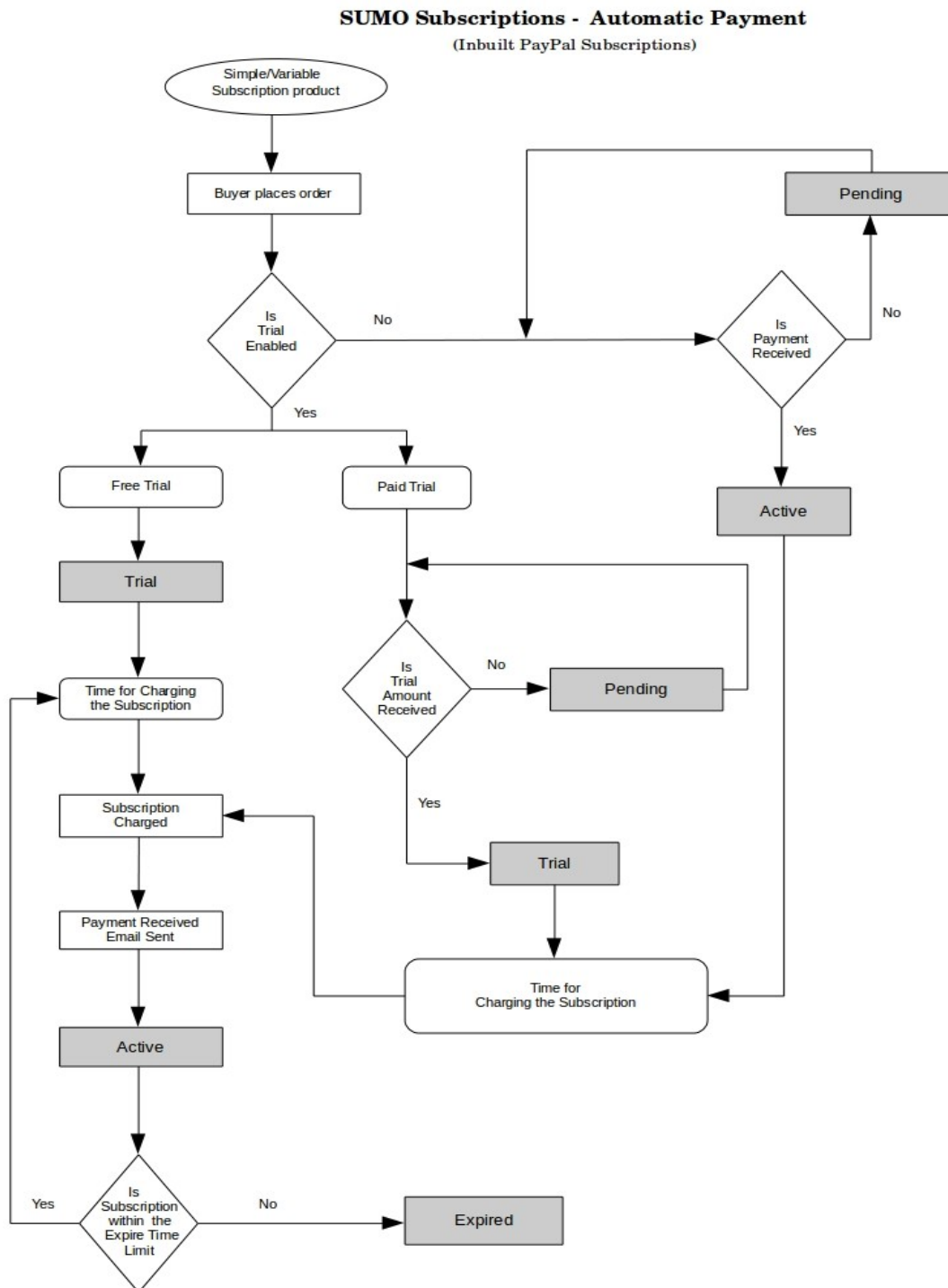
1. Automatic Payment Mode

In this mode, when user purchase the subscription using automatic supported payment gateways, the renewal of the subscription will be processed automatically on the due date of the subscription.

Automatic supported payment gateways are listed below,

1. PayPal Standard
2. WooCommerce Stripe(Credit Card)
3. WooCommerce PayPal Payments

1. PayPal Standard(PayPal Subscriptions API)

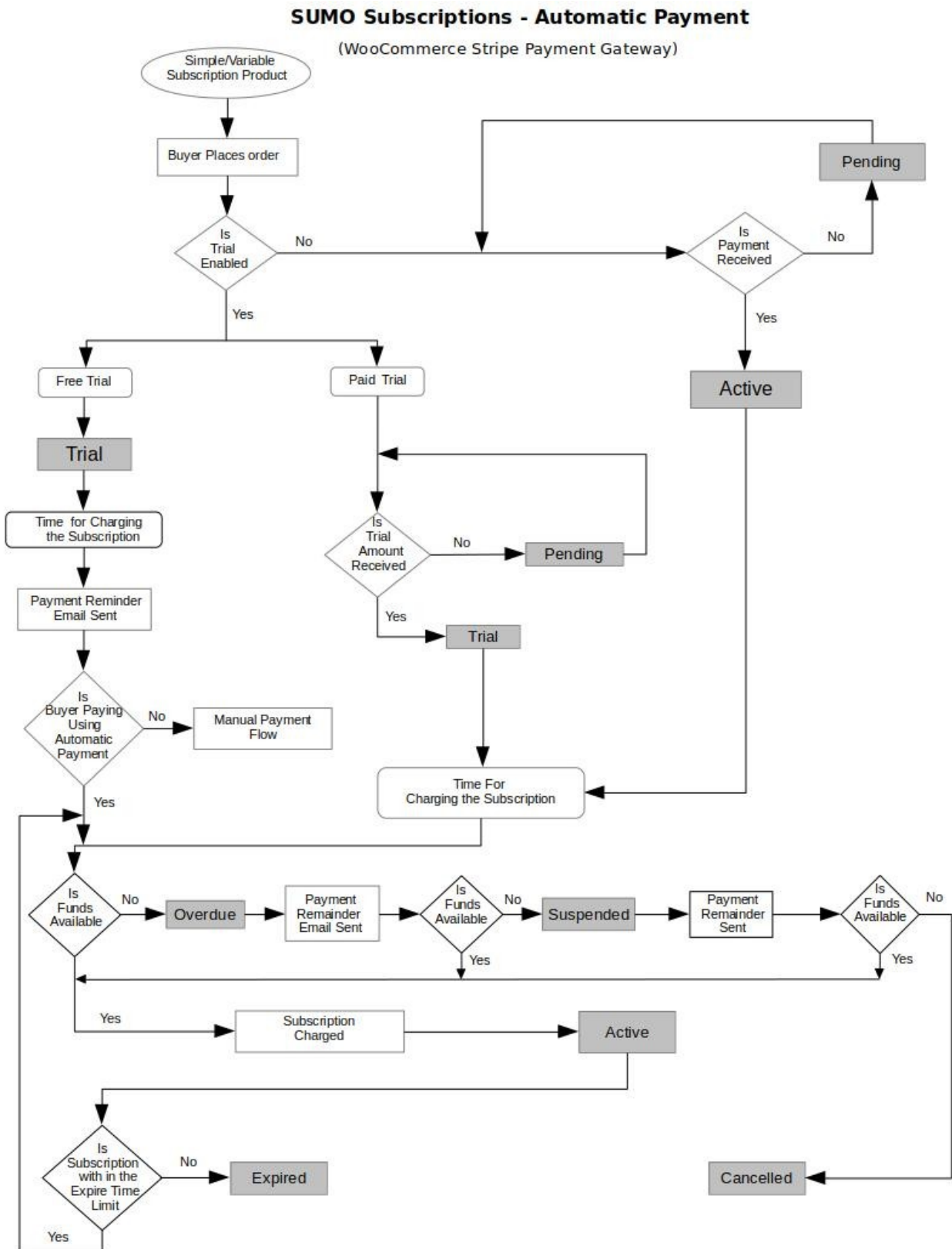


Limitations of PayPal Standard

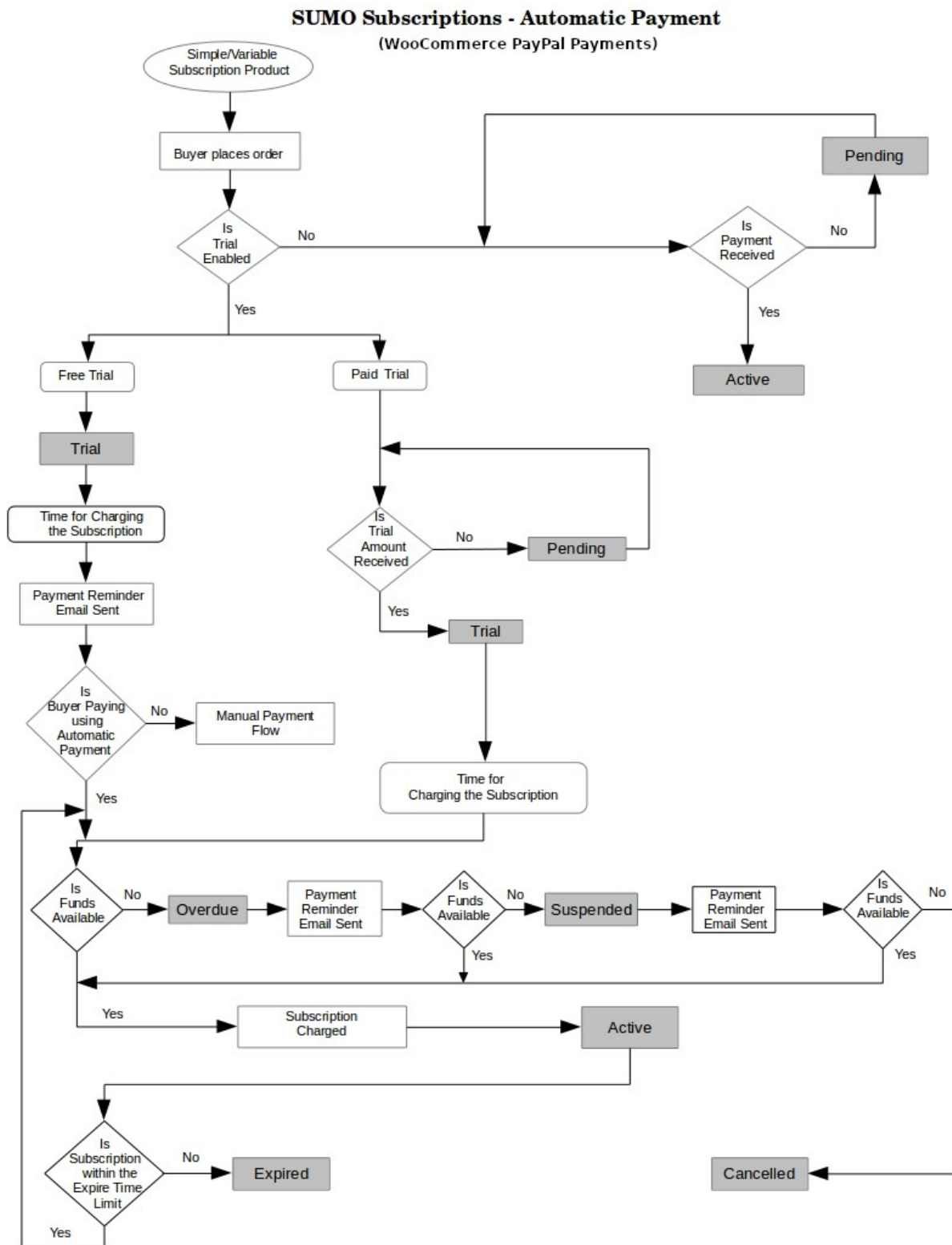
- Subscription Renewal Price cannot be modified by the site admin for the renewals.
- Switching from one variation to another is not allowed by subscriber/site admin.
- Upgrade/Downgrade feature will not work
- **PayPal** will manage with automatic creation of Renewal Orders and Processing of Payments. It will not consider any plugin settings for creating renewal orders.

- Users can't subscribe for multiple subscription products in a single checkout(but can subscribe for multiple quantities of same subscription product).
- Change of Status of Subscription is completely based on IPN Response.
- Shipping and Tax cost can't be included/excluded in Renewal Orders. Exact price of subscription amount in parent order will be charged for subscription Renewal.
- PayPal gateway will automatically change to manual recurring mode if the Cart contains more than 1 products(subscription or non-subscription products), Order Subscriptions, the subscription product has Signup Fee(without Trial), Synchronized Subscriptions.

2. WooCommerce Stripe(Credit Card)



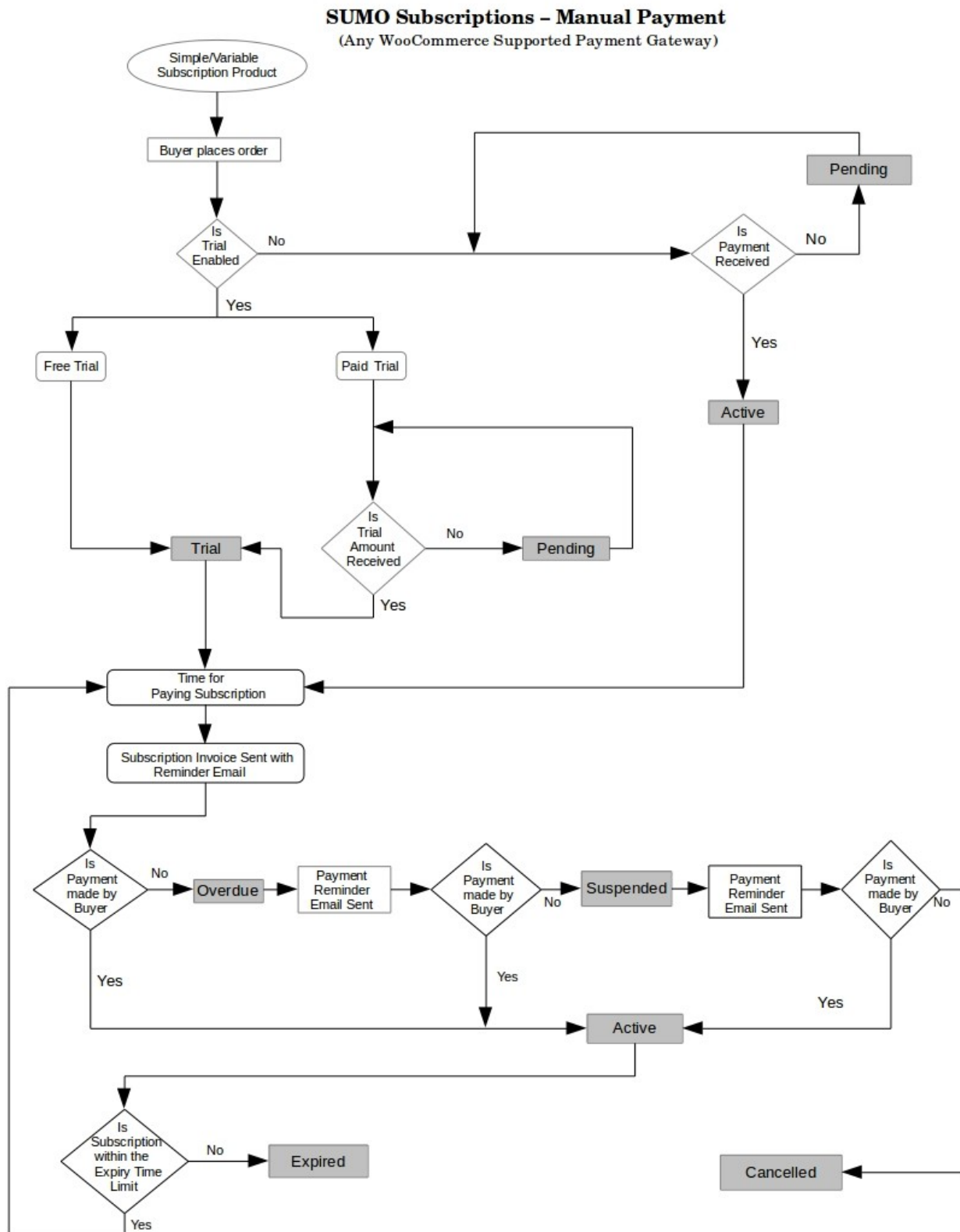
3. WooCommerce PayPal Payments



2. Manual Payment Mode

In this mode, when user purchase using manual payment gateways, then before the due date of the subscription, user will be notified by email in order to pay for the renewal. The reminder email will

have a Pay link which when clicked, the user will be redirected to Pay for Order page where they can make the renewal payment.



Subscription Synchronization

Using Synchronization feature, you can get renewal payments for a single subscription from all the subscribers of the product on the same date/day. For example, if a user purchase a

subscription(consider a monthly subscription) on 10th of the month and another user purchase the same subscription on 23rd of the month, then it is possible to get the renewal payment of the subscription from both the user on 1st of next month.

Upgrade/Downgrade

Using Upgrade/Downgrade feature, user can switch from one subscription to another subscription just by paying the difference amount(depends on Upgrade/Downgrade configuration) between the subscription products.

Upgrade/Downgrade is supported for Variable products and Grouped products. In case of variable products, user can upgrade/downgrade from one variation to another variation of the same subscription product. In case of grouped products, user can upgrade/downgrade from one subscription product(simple subscription) to another subscription product(simple subscription) within the group.

Subscription Pause, Cancel, Resubscribe

It is possible for you to allow the user to pause, cancel, resubscribe their subscriptions from their My Account page. You can give these facilities to users with some restrictions so that users will not be able to misuse these facilities.

Free Trial and Paid Trial Supported

You can give trial period for the users(for product level subscription) so that users can try the subscription for some time and continue their subscription. You can give the trial as free or else if you want to charge some amount for the trial period, it can be possible using paid trial.

Configuration

To configure the plugin, go to your dashboard > SUMO Subscriptions > Settings

General

Button Settings

Add to Cart Button Label - Replace the default Add to Cart button label with your custom label for subscription products using this option.

Renewal Order Settings

Create Renewal Order - Subscription renewal order will be created 1 day before the due date by default. If you want to customize this in order to create the renewal order earlier, then set how many days before the order has to be created in this option. For example, if 3 is set in this option, then renewal order will be created 3 days before the renewal date of the subscription.

Include Shipping Cost in Renewal Order - If you want the shipping cost to be charged during the renewal of the subscription, then enable option. If you want to charge an updated shipping cost for the future renewals, then you have to edit the Parent order of the respective subscription and update the shipping cost so that the modified shipping cost will be charged for the future renewals.

Include Tax Cost in Renewal Order - If you want to charge Tax cost for the renewals of the subscription, then enable this option.

Subscription User Role Settings

Active User Role – To set a specific user role to subscribers(customers who have atleast one active subscription), select the user role here.

Inactive User Role – To set a specific user role to non-subscribers(customers who don't have any active subscription), select the user role here.

Overdue and Suspend Settings

Overdue Period - If you want the subscription has to go to Overdue status if the user doesn't makes the payment even after the due date. If it is set as 3 days, then subscription will be in Overdue status for 3 days from the actual due date of the subscription. user will have complete access to their subscription if it is in Overdue status. They can still make the renewal payment in Overdue status.

Suspend Period - If you want the subscription has to go to Suspend status if the user doesn't makes the payment even after the due date and the overdue period. If it is set as 3 days, then subscription will be in Suspended status for 3 days after the Overdue period(if configured) or after the actual due date of the subscription(if Overdue Period is not set). user will not have access to their subscription if it is in Suspended status. They can still make the renewal payment in Suspended status.

Email Notification Settings

Send Manual Payment Reminder Email - In manual payment mode, set the day(s) before which the users have to be notified with reminder email in this option. For example, if 3, 2, 1 is set here, then users will be notified before 3 days, before 2 days and before 1 day of the renewal date of the subscription.

Send Automatic Payment Reminder Email - In automatic payment mode, set the day(s) before which the users have to be notified with reminder email in this option. For example, if 3, 2, 1 is set here, then users will be notified before 3 days, before 2 days and before 1 day of the renewal date of the subscription.

Send Overdue Reminder Email - If the subscription goes to Overdue status, then immediately a subscription overdue email will be sent to subscriber. If you want to send additional subscription overdue emails, then set the days for which the users have to be notified in this option. If 1,2,3 is set here, users will be notified after 1 day, after 2 days and after 3 days of overdue date.

Send Suspend Reminder Email - If the subscription goes to Suspend status, then immediately a subscription suspend email will be sent to subscriber. If you want to send additional subscription suspend emails, then set the days for which the users have to be notified in this option. If 1,2,3 is set here, users will be notified after 1 day, after 2 days and after 3 days of suspend date.

Send Expiry Reminder Email - If the subscription is a limited subscription(configured with limited Number of Installments), expiry email will be sent. Set the day(s) for which the users have to be notified by email in order to remind them about their subscription expiry in option. If 3, 2, 1 is set here, users will be notified before 3 days, before 2 days and before 1 day of the end date of the subscription.

Restriction Settings

Mixed Checkout - If you want to allow your users to purchase subscription products along with non-subscription products in a single checkout, then enable this option.

Cancel Subscription if Product is Out of Stock – If there is no stock left for the subscription product and if a user's subscription is going to be renewed, then if you want the subscriptions to be automatically cancelled, then enable this option. Subscription will be cancelled only on the due date.

Limit Subscription for Each Subscriber - By default, user can purchase and hold any number of subscriptions at a time. If you want to limit the user to hold only one active subscription per product, then select **One active subscription per product** in this option. If you want to limit the user to hold only one active subscription throughout the site, then select **One active subscription throughout the site** option.

Limit Trial for Each Subscriber - By default, user can get trial period of subscription products without any limit. If you want to limit the user to get trial period only once per subscription, then select **One trial per product** in this option. If you want to limit the user to get trial period only once throughout the site, then select **One trial throughout the site** option.

Limit Variable Subscription Products at - For Variable subscription products, the per product limits in the above options will be applicable by variant level by default. i.e. each variant will be considered as a different product. If you want all variations to be considered as a single product, then select **Product level** in this option.

Subscription Payment Settings

Enable Manual Payment Mode - If you want to allow your users to place subscription orders in manual payment mode, then select this option. To force users to use only automatic payment mode, then disable this option.

Disable Automatic Payment Mode - If you don't want to get payments in automatic payment mode, then select option.(this option will be displayed only if the "Enable Manual Payment Mode" option is enabled)

Payment Mode for Automatic Supported Payment Methods - For automatic supported payment methods, by default user will have an option to choose between automatic/manual payment mode(Enable Automatic Payment checkbox will be displayed for the users when the payment method is selected). If you don't want to give this option to the user, then select **Force automatic/Force manual** option as per your needs.

Show Automatic Payment Methods when Order Amount is 0 - If a subscription order amount is 0, then by default no payment methods will be displayed in checkout and user will be able to place the order as per WooCommerce behaviour. In case if you are using automatic payment mode, then you may need to get payment details from the user during initial purchase itself. In such case enable this option so that payment methods will be displayed.

Automatic Payment Retry in Overdue status - If you have set overdue period in SUMO Subscriptions > Settings > General > Overdue and Suspend Settings > Overdue Period, then in automatic payment mode, the plugin will auto retry for payment when the subscription is in Overdue status. Set how many times a day payment retry will have to happen in this option.

Automatic Payment Retry in Suspended status - If you have set suspend period in SUMO Subscriptions > Settings > General > Overdue and Suspend Settings > Suspend Period, then in automatic payment mode, the plugin will auto retry for payment when the subscription is in Suspended status. Set how many times a day payment retry will have to happen in this option.

Order Subscription

General Settings

Enable Order Subscription - To allow your users to purchase whole cart items(non-subscription products) as a single subscription in checkout page, then enable this option.

Display Order Subscription in Cart Page – To display Order Subscription option in cart page(in addition to checkout page), then enable this option.

Order Subscription Checkbox Default Value - If you want the order subscription checkbox has to be enabled by default, then enable this option. If the checkbox has to be disabled by default, then disable this option.

Order Subscription Values - If you want to set a fixed subscription frequency and number of installment for order subscription, then select **Predefined by admin** in this option. Then, select the **Renewal Frequency** and **Number of Installments** in the respective options. If you need to allow the user to chose subscription frequency and number of installment for order subscription, then select **Can be chosen by user** option. Frequency values which user can choose can be contrlled in **Renewal Frequency Values User can Select** option. In **Renewal Frequency Minimum and Maximum Values User can Select** option, set the minimum and maximum values you need to give the user to choose. If you want to give user to choose the number of installments, then enable **Allow User to Select Number of Installments** option and set the minimum and maximum values in **Number of Installmets User can Select** option.

Charge Sign up Fee - If you want to charge a sign up fee for order subscription from the user, then enable this option. Set the fee in **Sign up Fee** field.

Restriction Settings

Product/Category Filter - If you want the order subscription to be displayed only when specific products are in the cart, then include/exclude the products using this option. If one or more order subscription not applicable product(s) are in the cart, then order subscription option will not be displayed for the user.

Minimum Order Total to Display Order Subscription - If you want the order subscription to be displayed only when order total is greater than a minimum amount, then set the minimum amount in this option.

Consider Minimum Order Total Based on – Set whether the minimum amount has to be decided based on “Cart Total” or else “Cart Subtotal” in this option.

Synchronization

Synchronization Settings

Enable Synchronization - To synchronize the subscription products, enable this option. Once enabled, in edit product page, **Synchronize Renewals** option will be displayed where you have to set the sync date/day

Synchronization Behaviour - In this option, select **Exact Date/Day** if you want the first payment of the subscription to be charged on a set date and month. For example, if you want the first payment of a 3 month subscription to be processed only on 1st January 2021 irrespective of the purchase date of the subscription, then select Exact Date/Day. In case if users purchase the subscription any time before 1st January 2021, they will be charged only on 1st January 2021. users purchase after this date will be charged only on 1st January 2022.

In **Synchronization Behaviour** option, select **First Occurrence** if you want the renewal to be processed only on the set date without considering the month. For example, if you want the first payment of a 3 month subscription to be processed on 1st January 2021, 1st April 2021, 1st July 2021, 1st October 2021, 1st January 2022 and so on. So, if a user purchase the subscription on 20th December 2020, their renewal will be processed on 1st January 2021. If a user purchase the same subscription on 20th February 2021, their first renewal will be processed on 1st April 2021.

Show Synchronized Next Payment Date in Single Product Page - If you want to show the next payment date for synchronized products in the single product page, then enable this option.

Payment for Synchronized Period – In this option, select **Free** if you doesn't want to charge any amount from the user before their first renewal date.

In **Payment for Synchronized Period** option, select **Prorate Payment** if you want to charge the prorated amount(if subscription amount is 60 for 1 month subscription, prorated amount will be 2/day). In **Prorate Payment** for option, select **All Subscription Products** if you want the prorated to be charged for all the subscription products. If the prorated has to be charged only for virtual products, then select **All Virtual Subscriptions**. In **Prorate Payment** on option, select **First Payment** if you want to charge the prorated amount while purchasing the subscription or else select **First Renewal** if you want the prorated amount to be charged during the first renewal along with the renewal subscription fee.

In **Payment for Synchronized Period** option, select **Full Subscription Fee** if you want to charge the full amount without considering the purchase date.

Upgrade/Downgrade

Upgrade/Downgrade Settings

Enable Upgrade/Downgrade - If you want to allow the user to upgrade/downgrade their subscription, then enable this option.

Deciding Factor for Upgrade/Downgrade – This option controls which one is the key to decide upgrade/downgrade. Select **Subscription renewal frequency** if the key to upgrade/downgrade is the renewal frequency of the subscription without considering the price. For example, switching from 1 month subscription to 1 year subscription is Upgrade. Switching from 1 month subscription to 1 week subscription is Downgrade. Switching from 7 days subscription to 1 week subscription is

Crossgrade. Select **Subscription price** if the key to upgrade/downgrade is the price of the subscription. For example, switching from 15\$ /week(which means 2.14\$/day) to 100\$ /month(3.33\$ /day) refers to upgrade and switching from 60\$/month(2\$ /day) to 600\$/year(1.64\$/day) refers to downgrade.

Allow Users to – In this option, choose the switching options(upgrade, downgrade, crossgrade) you have to give to the user.

Allow Upgrade/Downgrade – In this option, select **Between variations of a variable subscription product** if you want to allow user to switch between variations of a variable subscription product. Select **Between simple subscriptions of a grouped subscription product** if you want to allow users to switch between simple subscription products within a group.

Payment During Upgrade/Downgrade – In this option, select **Prorate payment** if you want to charge only the difference amount between the subscriptions. Select **Full subscription price** if you want to charge the full price of the new subscription.

Charge Sign Up Fee - By default, sign up fee will not be charged while upgrading/downgrading. If you want to charge the difference amount in sign up fee between the two subscriptions, then in this option, select **Charge gap sign up fee**(fee will be charged only if sign up fee is set for the subscription to be switched). If you want to charge the full sign up fee, then select **Charge full sign up fee** option.

Prorate Remaining Number of Installments - By default, while switching the subscription, the number of installments of the subscription will be updated to Recurring Cycle configured for the new subscription product. If you want to prorate the renewal frequency and update the number of installments, then in this option, select **For virtual subscriptions/For all subscriptions** as per your requirement.

Upgrade/Downgrade Button Label – Customize the upgrade/downgrade button label in this option

My Account

Users can manage their subscriptions in their My Account Page > My Subscriptions section. They can view, pause, cancel, upgrade/downgrade, switch their subscriptions there.

Pause Settings

Allow Subscribers to Pause Subscriptions - If you want to allow the users to pause their subscription, then enable this option. When the user pause their subscription, the subscription duration will be extended based on the pause duration.

Allow Subscribers to Pause Synchronization Enabled Subscriptions - If you want to allow the users to pause the subscription with a synchronized renewal, then enable this option. When the user pause a synchronized subscription, the subscription duration will be extended based on the pause duration and their next due date will be updated only on the next possible Sync date.

Maximum Pause Count – In this option, set how many times a user can pause a subscription.

Maximum Pause Duration – In this option, set how long a user can Pause their subscription. After the set duration, the subscription will be resumed automatically.

Allow User to Select the Resume Date - If you want to allow users to schedule the resume date of the subscription they are pausing, then enable this option.

User/User Role Filter - If you want to give the pause option only for specific users, then use this option.

Cancel Settings

Allow Subscribers to Cancel Subscriptions - If you want to allow the users to cancel their subscriptions, then enable this option.

Allow Subscribers to Cancel Subscriptions After - If you want to give the cancel option to users only after specific days from the date of purchase, then in this option, set the number of days by which cancel option has to be displayed for the customer.

Cancel Methods to be Shown for Subscribers - In this option, select **Cancel immediately** to give immediate cancellation option for the user. If user cancels using this method, subscription status will be updated to Cancelled immediately after the user cancel the subscription. Select **Cancel at the end of billing cycle** to give end of billing cycle cancellation option for the user. If user cancels using this method, subscription will still be in Active until the end of the ongoing billing cycle and after that it will be updated to Cancelled. Select **Cancel on a scheduled date** to give user a date to schedule their cancellation within the ongoing billing cycle. If a user cancels using this method, subscription will be active until the scheduled date and after that it will be cancelled automatically.

Product/Category Filter - If you want to give the cancel option only for specific subscription products/ products under specific categories, then use this option.

User/User Role Filter - If you want to give the cancel option only for specific users, then you can filter using this option.

Miscellaneous Settings

Allow Subscribers to Switch Between Identical Variations - If you want to allow your users between one variation to another variation(without any difference in price, duration, etc), then enable this option.

Allow Subscribers to Update Subscription Quantity - If you want to allow your users to update the quantity of their subscriptions(not applicable for Order Level Subscription), then enable option. The new quantity will be updated from the upcoming renewal of the subscription(if renewal order is already created before changing the quantity, then it will be updated after the upcoming renewal).

Allow Subscribers to Resubscribe - If you want to allow your users to resubscribe if the subscription gets expired/cancelled, then enable option. If you want to hide the Resubscribe option in certain instances, then select the instances in **Hide Resubscribe Button when** option.

Allow Subscribers to Turn Off Automatic Payments - If the user place the subscription in automatic payment mode and if you want the user to turn off their automatic payment, then enable this option. If subscriber turn off their automatic payment for a subscription, then it will move to manual payment mode.

Allow Subscribers to Change the Shipping Address - To allow the users to update the shipping address for their future renewals of the subscription, then enable this option.

Drip Downloadable Content - If the subscription product is a downloadable product and if you want to allow your users to download the newly added files only when they renew the subscription, then enable option.

Enable Additional Digital Downloads - If you want to give additional downloadable files(attached in other downloadable products), when purchasing the subscription product, then select this option. When this option is enabled, **Enable Additional Digital Downloads** option will be displayed in Edit product page.

Show Activity Logs - By default, users can see their subscription logs in View subscription page. If you want to hide the logs, then disable this option.

Endpoints Settings

In this section, you can update the my account page endpoints of SUMO Subscription section.

Advanced

Advanced Settings

Subscription Price for Old Subscribers - By default, when a user purchase a subscription, until the end of the subscription, they will have to pay the same subscription price which they have paid while purchasing the subscription even if the subscription price has increased/decreased. If you want to charge the user the updated price from the next renewal, then select **New price** here.

Activate Subscription - By default, when the user purchase the subscription, it will be activated immediately once the parent order status goes to processing/completed status. If you want the subscription has to be activated only after admin approval, then select **After admin approval** here.

Activate Free Trial - If the subscription is configured with Free Trial, then when user purchase the subscription, trial will be activated instantly after purchasing the subscription. If you want the trial to be activated only after admin approval, then select **After admin approval** here.

Set Subscription Product as Regular Product for Specific User Role(s) - If the subscription option has to be available only for specific users and for others it has to be regular products, then in this option, click **Add Rule** button and choose the subscription products and select the userroles for which you want to display it as regular product.

Allow Subscribers to Pay For Cancelled Subscriptions – By default, once subscription is Cancelled, subscribers can't pay for the renewal. Enable this option if you want the subscribers to pay for their cancelled subscriptions, then enable this option.

Display Settings

Display Price Message for Variable Products – For variable products, customize how price message has to be displayed using this option.

Show Timezone - By default, timezone will be displayed in subscription details for the user. If you want to hide it, then disable this option.

Timezone - All the subscription activities will be processed only in UTC+0 Timezone. For display purpose, you can show your site timezone. To do so select **WordPress timezone** in this option.

Show Time – If you want to display time near the subscription dates, then enable this option.

Email Settings

Disable WooCommerce Emails for Subscription Orders - If user place a subscription order, standard WooCommerce emails and subscription emails will be sent to user and admin. If you feel similar emails are sending, then you can disable WooCommerce emails for subscription orders. For that, in this option, select the email templates you want to disable. You can select New order, Processing order, Completed order, Cancelled order email templates

Bulk Action

Using Bulk Action, you can update subscription values for all/multiple products at once. If you are updating for multiple products at once, then it may take some time to update.

Note: It is not possible to Synchronize Renewals using Bulk Action.

Troubleshoot – Deleted Product Replacement

If you have deleted a subscription product(or variation in case of variable subscription), then subscription renewals won't work properly. In such case you can replace the deleted product with a new product(set the same subscription values for the new product) so that subscription will continue to work properly.

Deleted Product ID – Enter the deleted product ID here

Product to be Replaced – Search and select the product which you have created in order to replace.

Messages

In this section, you can customize the subscription plan message and other subscription related messages displayed in the frontend.

Creating a Simple/Variable Subscription Product

Add a new product or else edit an existing product. In Product Data, select the product type as Simple product if you want to create simple subscription product. Set it as Variable product if you want to create variable subscription product.

In case of variable subscription product, first create attributes and after that create the Variations as per your requirement. You can enable SUMO Subscriptions option for each variation.

Set the Regular price which will act as the subscription price. If Sale price is given, it will act as the subscription price.

In **SUMO Subscriptions** option, select **Enable**

In **Subscription Renewal Frequency** option, set the billing interval of the subscription.

If you want to give trial for the subscription and give it mandatorily, then select **Forced trial** in **Trial** option. If you want to give trial optional for the user, then select **Optional trial**.

In **Trial Type** option, select **Free trial** if you don't want to charge any amount for the trial period and select **Paid trial** if you want to charge some amount for the trial period and set the fee in **Trial Fee** option.

Set the duration for trial in **Trial Duration** option.

If you want to charge sign up fee from the user for purchasing the subscription, then in **Charge Sign Up Fee** option, select **Forced sign up** if you want to charge the fee mandatorily from the user. Select **Optional sign up** if you want to give it optional and the fee will be charged only when the user opts for Sign up. Set the fee in **Sign Up Fee** option.

Set how many times the subscription renewal has to be happen in **Number of Installments** option.

If you have enabled Synchronization in SUMO Subscriptions > Settings > Synchronization, then the **Synchronize Renewals** option will be displayed and you can synchronize the subscription.

If you have selected **First occurrence** in SUMO Subscriptions > Settings > Synchronization > Synchronization Settings > **Synchronization Behaviour**, then the below workflow will be applicable,

If the Subscription Renewal Frequency value is in **Week(s)**, then you can choose to synchronize any weekdays(Sunday – Saturday). If you have set Wednesday, then irrespective of the purchase day, the first renewal will happen only on upcoming Wednesday.

If the Subscription Renewal Frequency value is in **Month(s)/Year(s)**, then you can choose to synchronize any day between 1st of the month - 28th of the month. If you have set 5th of the month, then irrespective of the purchase date, the first renewal will happen only on upcoming 5th of the month.

If you have selected **Exact date/day** in SUMO Subscriptions > Settings > Synchronization > Synchronization Settings > **Synchronization Behaviour**, then the below workflow will be applicable,

If the Subscription Renewal Frequency value is in **Week(s)**, then you can choose to synchronize any weekdays(Monday – Sunday). If you have set Wednesday, then irrespective of the purchase day, the first renewal will happen only on upcoming Wednesday.

If the Subscription Renewal Frequency value is in **Month(s)/Year(s)**, then you can set a specific date and month as start date of the subscription. For example, if you have set 1st January, irrespective of the subscription duration, the subscription will start only on 1st January of the upcoming year.

Creating a Grouped Subscription Product

First create multiple simple subscription products using the steps given in **Creating a Simple/Variable Subscription Product** section.

Now, add a new product or else edit an existing product. In **Product Data**, select the product type as **Grouped product**

Go to **Linked Products** and in **Groped Products** field, search and select the simple subscription products which you have created previously.

Creating a Product Level Subscription Order Manually and Assign to Users

Go to WooCommerce > Orders > Add order

In **Customer** option, select the user for which you need to assign the subscription.

In Item section, click **Add item(s)** button and then click **Add product(s)** button. Search and select the subscription product(s) you want to assign for the user and click **Add** button.

Update the order status to **Pending payment** if you want to send invoice and get payment for the subscription. If you don't want to get payment, then update the order status to **Processing/Completed**. Finally Create the order so that subscription will be created automatically.

Creating Order Level Subscription Order Manually and Assign to Users

Go to WooCommerce > Orders > Add order

In **Customer** option, select the user for which you need to assign the subscription.

In Item section, click **Add item(s)** button and then click **Add product(s)** button. Search and select the non-subscription product(s) you want to assign for the user and click **Add** button. You can add multiple non-subscription products by repeating this step.

Navigate to "Order Subscription" meta-box and select "Enable Order Subscription" option.

Set the "Renewal Frequency" and "Number of Installments".

Update the order status to **Pending payment** if you want to send invoice and get payment for the subscription. If you don't want to get payment, then update the order status to **Processing/Completed**. Finally Create the order so that subscription will be created automatically.

Creating Subscription Coupons

Go to dashboard > Marketing > Coupons

Click **Add coupon** button to create a new coupon

Give the coupon code in the respective field.

Go to **General** tab in Coupon data section

Set the **Discount type** as **Sign up fee discount** if you want to give a fixed discount in sign up fee of the subscription.

Set the **Discount type** as **Sign up fee % discount** if you want to give a discount in percentage for the sign up fee of the subscription.

Set the **Discount type** as **Recurring fee discount** if you want to give a fixed discount in subscription fee for the initial and renewals of the subscription.

Set the **Discount type** as **Recurring fee % discount** if you want to give a discount in percentage for the subscription fee for the initial and renewals of the subscription.

Configure the other options as per your requirement.

HOOKS AND FILTERS

HOOKS

- 1. sumosubscriptions_active_subscription** - Trigger after Subscription is Active
- 2. sumosubscriptions_pause_subscription** - Trigger after Subscription is Paused
- 3. sumosubscriptions_cancel_subscription** - Trigger after Subscription is Cancelled
- 4. sumosubscriptions_admin_send_manual_subscription_email** - Trigger after Admin manually send the Subscription emails
- 5. sumosubscriptions_manual_{subscription_status}_subscription** - Trigger when Subscription custom status gets updated
- 6. sumosubscriptions_before_adding_renewal_order_item** - Trigger before adding subscription order item upon creating renewal order
- 7. sumosubscriptions_before_adding_shipping_in_renewal_order** - Trigger before adding shipping upon creating renewal order
- 8. sumosubscriptions_before_adding_discount_in_renewal_order** - Trigger before adding discount upon creating renewal order
- 9. sumosubscriptions_fire_{cron_event_name}** - Trigger before Subscription Cron event gets elapsed
- 10. sumosubscriptions_process_preapproval_status** - Check the Automatic Subscription Preapproval status is valid to renew the Subscription
- 11. sumosubscriptions_process_preapproved_payment_transaction** - Automatically transact the renewal charges
- 12 sumosubscriptions_preapproved_payment_transaction_success** - Trigger after the Subscription renewal Success
- 13. sumosubscriptions_preapproved_payment_transaction_failed** - Trigger after the Subscription renewal failed
- 14. sumosubscriptions_preapproved_access_is_revoked** - Trigger after the Automatic renewal access is revoked by Subscriber
- 15. sumosubscriptions_email_order_details** - Display Subscription details table in Subscription email template
- 16. sumosubscriptions_email_order_meta** - Add Subscription order meta in Subscription email template
- 17. sumosubscriptions_before_view_subscription_table** - Trigger before View Subscription table in My Account page
- 18. sumosubscriptions_after_view_subscription_table** - Trigger after View Subscription table in My Account page
- 19. sumosubscriptions_checkout_update_order_meta** - Trigger when Subscription Order checkout is processing
- 20. sumosubscriptions_after_new_subscriptions_added** - Trigger after new subscriptions gets placed
- 21. sumosubscriptions_before_adding_new_subscriptions** - Trigger before new subscription gets placed

- 22. sumosubscriptions_before_subscription_is_created** - Trigger before the subscription is created
- 23. sumosubscriptions_subscription_created** - Trigger after the subscription is created

FILTERS

- 1.sumosubscriptions_valid_subscription_statuses_to_become_active_subscription** - Filter the Subscription statuses to become Active Subscription
- 2. sumosubscriptions_subscription_failed_statuses** - Get Subscription failed statuses
- 3. sumosubscriptions_edit_subscription_page_readonly_mode** - Bool Admin can update edit subscription page html fields.
- 4. sumosubscriptions_admin_can_change_subscription_statuses** - Bool Admin can update the Subscription statuses
- 5. sumosubscriptions_edit_subscription_statuses** - Returns Admin editable Subscription statuses
- 6. sumosubscriptions_show_cron_events_post_type_ui** - Bool to show Subscription cron events post type menu
- 7. sumosubscriptions_my_subscriptions_table_title** - Alter My Subscriptions table title in My Account page
- 8. sumosubscriptions_schedule_subscription_crons** - Bool whether to schedule the cron event or not
- 9. sumosubscriptions_cart_product_total** - Returns subscription item total in cart
- 10. sumosubscriptions_add_new_subscriptions** - Bool to add new subscriptions upon user placing the subscription order
- 11. sumosubscriptions_payment_mode_switcher_payment_gateways** - Get valid payment gateways applicable for payment mode switcher
- 12.sumosubscriptions_get_payment_mode_switcher_in_payment_gateway** - Get payment mode switcher field for payment gateways
- 13. sumosubscriptions_display_variation_switch_fields** - Upon displaying Subscription variation switcher
- 14. sumosubscriptions_multiplication_factor** - Alter stripe multiplication factor
- 15. sumosubscriptions_product_price_msg_for_subsc_fee** - Get Subscription fee in displaying subscription plan
- 16. sumosubscriptions_renewal_item_total** - Alter subscription renewal order item total upon creating renewal order
- 17. sumosubscriptions_alter_subscription_plan** - Get Subscription plan
- 18. sumosubscriptions_alter_subscription_plan_meta** - Get Subscription plan meta
- 19. sumosubscriptions_my_subscription_table_pause_action** - Bool to show Pause button to Subscriber
- 20. sumosubscriptions_my_subscription_table_cancel_action** - Bool to show Cancel button to Subscriber
- 21. sumosubscriptions_order_has_subscriptions** - Bool to check whether the order contains subscriptions

22. sumosubscriptions_subscription_type - Get the type of subscription based on user checkout the subscription order

23. sumosubscriptions_get_next_payment_date - Get the subscription next payment/due date

TRANSLATION

SUMO Subscriptions Plugin is translation ready meaning you can edit the po files by which you can translate the text to any language For example, a translation to French.

Download and install **Poedit**

Open the file **sumosubscriptions > languages > sumosubscriptions.pot** using Poedit.

Create a new translation file by clicking **Create new translation** button.

Choose the Source text and set its corresponding French text in Translation Text Area.

Save the changes.

Save the file name as **sumosubscriptions-fr_FR.po**.

Then go to **WordPress dashboard > Settings > General** and select the Site Language as **French**.