

Subscription Maintenance

Overview

Subscription Maintenance provides access to all [product subscriptions](#) purchased, whether they are *active* (current) or *expired* (no longer current).

The Search tool allows Administrators and CMS Users with the Subscription Product Roles ('Product Subscription Management' and 'Product Subscription Viewer') to look up subscriptions records and manage each purchased subscription. New subscriptions on account or are non-chargeable can also be manually created here.

On this page:

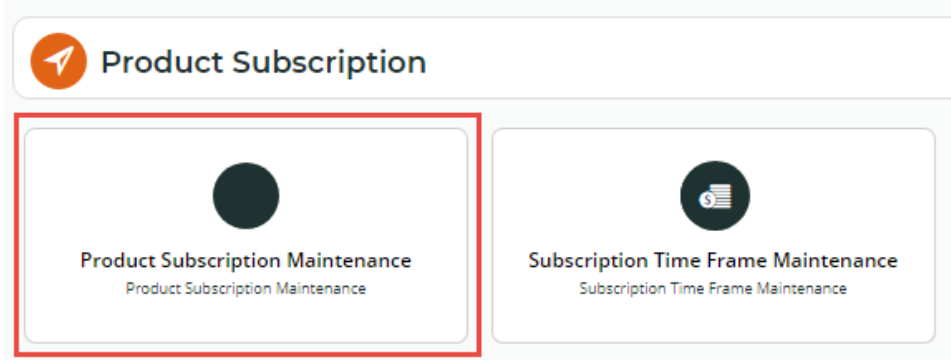
- [Overview](#)
 - [Look up a Subscription](#)
 - [Edit a Subscription](#)
 - [Cancel an active Subscription](#)
 - [Stop Auto Renew for an active subscription](#)
 - [Add a subscription manually](#)
 - [View all manually added Subscriptions](#)
- [Set a Website User as Subscription Admin](#)
- [Related help](#)

Look up a Subscription

Once a subscription order has been created (purchased on your site or manually added) and processed, the subscription record will display in the Subscription Maintenance screen.

To look up a specific subscription,

1. In the CMS, navigate to **Product Subscription Product Subscription Maintenance**.



2. The **Subscription Maintenance** screen defaults with all active subscriptions, ordered by the Date/Time they were created (with the most recent first).


The values for each subscription and subscription maintenance options are provided:


Subscription - subscription product purchased


Start Date / End Date - start and end dates of the active subscription

Customer Code - Customer account linked to the subscription purchased

Email Address - email address of the User who purchased the subscription

Active -  indicates the subscription is active (current)

Auto Renew -  indicates the subscription is recurring

Never Expires -  indicates the subscription has been no expiration date. (**NOTE** - This allows for special subscription uses such as granting internal staff access to the product.)

Options - buttons to Edit, Cancel Subscription or Stop Auto Renew a subscription (where applicable)

3. Use the **Search** tool to find the required subscription. Enter a keyword from the 'Subscription' or 'Email Address' column.

4. In **Filter**, select **Active** to search current subscriptions only or **Expired** for non-current ('Cancelled' or 'Expired') subscriptions only. Select **All** to include both Active and Expired subscription records.
5. Click the **Search** button to run the search. Records matching your search criteria will be listed.

Edit a Subscription

The 'End Date' and 'Never Expires' status of a subscription can be edited. **NOTE** - For expired auto-renewed subscriptions, the 'End Date' can only be changed for subscriptions with time frames that are still active in the system.

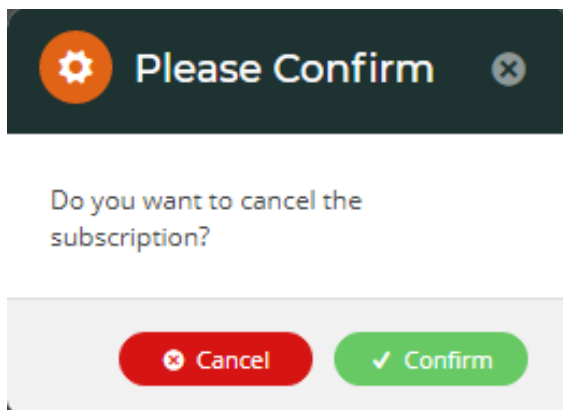
1. Find the subscription you want to edit using the Search tool.
2. Click the **Edit** button. The Subscription's details are displayed.
3. Change **End Date** or **Never Expires** as you require.
4. To save your changes, click the **Save** button.

Cancel an active Subscription

An active Subscription can be cancelled in the Subscription Maintenance screen or while in the subscription's Options screen. Cancelling a subscription will immediately stop customer access to the subscription product.

To cancel an active subscription in the Subscription Maintenance screen,

1. Find the subscription you want to edit using the Search tool.
2. Click the **Cancel Subscription** button.
3. You will be asked to confirm the deletion. Click **Confirm** to complete the deletion.



You can also cancel a subscription while in the Options screen for a subscription.

Stop Auto Renew for an active subscription

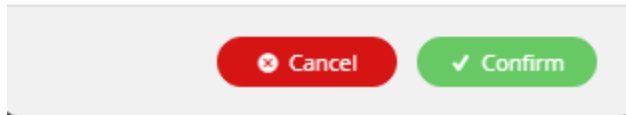
Auto Renew can be stopped for an active subscription in the Subscription Maintenance screen. Stopping auto renew will allow the customer to access the product until the expiry date.

To stop auto renew for an active subscription,

1. Find the subscription you want to edit using the Search tool.
2. Once found, click the subscription's **Stop Auto Renew** button.
3. You will be asked to confirm the auto renew stop. Click **Confirm** to complete the stop.



Do you want to stop the subscription auto renew?



You can also stop auto renew for a subscription while in the Options screen for a subscription.

Add a subscription manually

There may be occasions when a subscription is added manually. For example, you may want to set up a 'never expires' never charged subscription for internal staff access or a customer calls up and requests a subscription. If chargeable, manually added subscriptions can only be placed on account as the credit card functionality is not available. **NOTE** - Manually added subscriptions will not become active until the next time the scheduled task is run.

To add a subscription manually,

1. In the **Subscription Maintenance** screen, click the **Add New Subscription** button.
2. In **Email Address**, enter the email address linked to this subscription. **NOTE** - the email address must already be in the system as an existing Website User.
3. In **Customer Code**, only those linked to this User are listed. Select the required Customer Code.
4. In **Product Code**, start typing in the product name. Select from the products listed.
5. In **Never Expires**, select **Yes** or **No**.
6. In **Charge Customer**, select **Yes** or **No**. For non-recurring 'never expires' subscription products: if 'Yes' is selected, the user will be charged only once. For auto-renewing 'never expires' subscription products: if 'Yes' is selected, the user will be charged when the subscription is created and at each auto renew until it is manually stopped.

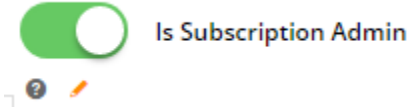
View all manually added Subscriptions

All manually entered subscriptions are listed at the bottom of the Add New Subscription screen. By default, those that are pending processing (status: 'Entered') are displayed. You can use the Filter in the Search tool to find subscriptions that have been 'Processed' or 'Cancelled' as well. You can also cancel a manually added subscription here.

Set a Website User as Subscription Admin

You can give one or more Website Users, e.g., staff, subscription administration rights. This will allow them to view all subscriptions, a subscription's details, update the credit card, and stop auto renew.

1. In the CMS, navigate to **Users Website Users**.
2. Find the required User, then click **Edit**.
3. In User Details, toggle ON Is **Subscription Admin**.



4. Click **Save & Exit**.

When this User logs into your website, they can access the **Subscription Maintenance** screen from the **Dashboard**. In this screen, they can search for subscriptions, view subscription details, update their credit card (in the View screen), and stop auto renew (if applicable).

Related help

- [Subscription Products](#)