**Setting Up & Managing Subscriptions Checklist**

Shopify can be used a subscription-based store using the subscription app from the Shopify App store. Use this checklist to guide you in setting up and managing your subscriptions.

**Setting Up Subscriptions**

* Install the subscription app in your Shopify Admin. Complete the setup in the app.
* Make sure the information is available in your customer list, customer profiles, on your product page, discounts, and orders list.
* Make sure you are eligible to accept subscriptions by using one of the following payment gateways: Shopify payments, PayPal Express, Auhorize.net
* You can’t use local delivery or pick up in store as delivery options for your subscriptions.
* Set up your products to be sold as subscription only or sell as one time purchases as well. Check or uncheck the box in the Sell product as a subscription only in the Products section of the Shopify admin area.
* Decide if you will offer a discount on your subscription purchases. You can choose to limit the use of your discount code to specific purchase types.

**Managing Subscriptions**

* Use the subscription status filter to sort your customers to find canceled, expired, active or paused members.
* Use the filter to see if a customer subscribed or had a failed payment
* View the customer profile to determine which products that customer has subscribed to and when their next order is scheduled for. This is found in the Active subscriptions section.
* Manage customers’ payment methods in the Shopify admin by clicking on Customers, clicking the customer’s name. In the Payment methods section click more actions. Then choose whether you want the customer to update it or to manually do it yourself.
* Manage subscription orders using the scheduled status. When the fulfillment date is reached, the status updates to unfulfilled. This is when you fulfill the order. When the order is set at Scheduled you can track the order on the Orders page without having to take an y action.
* Review all items in the prepaid subscription order, sort into Fulfilled, unfulfilled and scheduled fulfillment cards.
* Filter orders by the scheduled fulfillment status, displaying upcoming fulfillment work.
* Cancel a prepaid subscription order that hasn’t been fulfilled.
* Issue a full or partial refund on fulfilled orders.