

# **Akeeba Subscriptions User's Guide**

**Nicholas K. Dionysopoulos**

---

# Akeeba Subscriptions User's Guide

Nicholas K. Dionysopoulos

Publication date April 2011

## Abstract

This book covers the use of the Akeeba Subscriptions component and its bundled modules and plugins for selling and managing subscriptions on your Joomla!™-powered web sites.

Permission is granted to copy, distribute and/or modify this document under the terms of the GNU Free Documentation License, Version 1.3 or any later version published by the Free Software Foundation; with no Invariant Sections, no Front-Cover Texts, and no Back-Cover Texts. A copy of the license can be found on-line at <http://www.gnu.org/licenses/fdl.html>.

---

# Table of Contents

1. Introduction and installation .....	1
1. Introducing Akeeba Subscriptions .....	1
2. Requirements and compatibility .....	2
3. Installation .....	2
3.1. Installation .....	2
3.2. Installation troubleshooting .....	3
2. Initial set-up and usage .....	6
1. How subscriptions work .....	6
2. Configuration options .....	7
3. Subscription Levels .....	7
4. Tax Rules .....	8
5. Upgrade Rules .....	9
6. Coupons .....	10
7. Subscriptions management .....	11
8. Front-end items .....	12
9. Importing from other components .....	12
3. Payment methods, integrations and plugins .....	13
1. Payment methods .....	13
1.1. Paypal .....	13
1.2. None .....	14
2. Integration with third party software .....	14
2.1. JUGA Integration .....	14
3. Other plugins .....	15
3.1. Subscription expiration control .....	15
3.2. Subscription emails .....	15
3.3. Subscription expiration notification .....	16
3.4. Content restriction .....	16
4. Akeeba Subscriptions' modules .....	18

---

# Chapter 1. Introduction and installation

## 1. Introducing Akeeba Subscriptions

### At a glance

Akeeba Subscriptions is a subscriptions management component for Joomla!™ 1.5/1.6 and compatible distributions, such as Nooku Server and Molajo. It is built using the Nooku Framework and the best practices for rapid web application development which ensure stability and security. It is licensed under the GNU General Public License (GPL) version 3 [<http://www.gnu.org/licenses/gpl.html>] or –at your option– any later version published by the Free Software Foundation. Its licensing scheme means that you are free (and, in fact, more than welcome) to install it on as many sites as you want, whenever you want and use it for as long as you want, no strings attached. There are no secret per-domain licensing fees and you can use it to sell one or several millions of subscriptions without any hidden costs. We love Freedom of choice as much as you do!

### The killer features

Its feature list is nothing sort of amazing, either. Out of the box, Akeeba Subscriptions supports these features:

- Streamlined administrator interface which can even present you an interactive sales graph and sales report as soon as you launch the component
- Rich subscription levels (subscription packages) editor which allows you to choose different images for each of your subscriptions and even a different order confirmation and order cancellation text to show to your users.
- The easiest subscription management interface you've seen on a component. It will even show you your users' faces, powered by Gravatar.
- Users can upgrade or expand (renew) their subscriptions. Renewing a subscription will create a new subscription which becomes valid the very second their old one expires. Users do not lose any of their subscription time when renewing, unlike most other subscription systems out there.
- Full support for delayed payments, e.g. when using e-checks with PayPal.
- Discount coupon codes which allow you to set an absolute money value or percentage discount for all or a specific subscription level and user, have publish up/publish down dates or a usage limit (e.g. the coupon code is valid only for the first 100 people to use it) – or a combination of any and all of the above!
- Automatic discounts for upgrading or renewing subscriptions based on the subscription level and days of presence in the subscription package. This allows you to easily create rules like: 30% discount if you renew up to 30 days before the end of your subscription, 15% discount if you renew within the last 30 days, no discount otherwise.
- Full support for complex tax calculations based on country, state and ZIP code. It fully integrates with the European Union's VIES system so that you can charge no VAT tax for intra-EU B2B transactions.
- The subscription form can work with or without Javascript. With Javascript it becomes a fully fledged, auto-validating subscription form. Without Javascript it works as a standard web form, accessible to users who do not wish / can not use Javascript on their browser.
- Integration with JUGA: intelligently add/remove a user from JUGA groups based on his active subscriptions.
- Content restriction: a content plugin to show parts of your content only to registered subscribers, without the need of any external tool.

- Payment methods: PayPal (for personal, verified and business accounts) is supported out of the box
- Send emails to subscribers upon subscription, when their subscription/payment status changes and when their subscription is about to expire
- All the attention to details that makes a component worthy of carrying the Akeeba label!

## Support policy

Please note that the software is provided free of charge, but support is not. You need to have an AKEEBADELUXE or SUPPORT subscription on AkeebaBackup.com to seek support regarding setting up, using and customizing Akeeba Subscriptions. If you have found a bug and wish to report it, however, you can do so even without an active AkeebaBackup.com subscription.

## 2. Requirements and compatibility

Akeeba Subscriptions requires the following server-side configuration:

- PHP 5.2.6 or later. Running it on earlier versions will either be problematic or it won't work at all.
- MySQL 5.0 or later. Earlier database server versions will not be supported.
- Your server must support the mysqli driver and your site must use it. If not, Akeeba Subscriptions will try to switch your site to mysqli upon installation.
- If you are using the Suhosin patch for PHP, please read this tutorial [[http://nooku.assembla.com/wiki/show/nooku-framework/Known\\_Issues](http://nooku.assembla.com/wiki/show/nooku-framework/Known_Issues)] to avoid any potential conflicts. Support will not be provided if you are affected by this Suhosin issue.
- Joomla! 1.5.14 or later (fully supported) or Joomla! 1.6.0 or later (partial support for now). We know that some things in the back-end do not work properly (they look ugly or have other visual artifacts) with Joomla! 1.6. Fixing them would break Joomla! 1.5 compatibility, so please don't report them as bugs – we are just not going to fix them yet.
- The System - mooTools Upgrade system plugin MUST be enabled on Joomla! 1.5 sites.

Akeeba Subscriptions is compatible with other Nooku-based software which is using at least Nooku Framework 0.7 Alpha 2, such as Ninjaboard 1.0.7 and later. It will not work properly together with components using earlier versions of the framework, such as Joomlashack's LifeStream. If you're in doubt, please try installing Akeeba Subscriptions on a copy of your site and test its behaviour.

## 3. Installation

### 3.1. Installation

There are two available installation packages. The one with -noframework in its name contains only the component, modules and plugins of Akeeba Subscriptions. The one without -noframework contains everything plus a copy of the Nooku Framework. If you don't have any other Nooku-based software on your site, please install the regular package. If you have another Nooku-based software on your site, such as Ninjaboard 1.0.7 or later, please try installing the -noframework package first and, if that doesn't work properly, take a backup of your site and try installing the regular package.

Installing the package is the same as with any other Joomla! component. Go to your site's back-end, Extensions, Install/Uninstall (Joomla! 1.5) or Extensions, Manage (Joomla! 1.6) and click on Browse. Locate the ZIP package and click on Upload and Install. If the installation fails, please refer to the installation troubleshooting section of this guide.

## Important

On Joomla! 1.5 sites you **MUST** publish the System - mooTools Upgrade system plugin for Akeeba Subscriptions to work properly. If you don't, the interface will appear broken and you will not be able to use the component. If you file a support request regarding that, we'll just reply with "RTFM" (RTFM is the acronym for Read The Fine Manual).

## 3.2. Installation troubleshooting

### Joomla! 1.6 is logging you out during installation

The first thing you might observe is that **Joomla! 1.6 is logging you out when trying to install** Akeeba Subscriptions. This is due to a bug in Joomla! 1.6. Please follow these instructions [[http://docs.joomla.org/Why\\_does\\_the\\_administrator\\_logoff\\_all\\_of\\_the\\_sudden](http://docs.joomla.org/Why_does_the_administrator_logoff_all_of_the_sudden)] to fix the database table that causes this issue. After doing that you will have to log in again to your site. You will see that everything is missing from the back-end interface. Don't panic! That's part of the Joomla! bug. Just log out using the link on the top-right of your page, then log back in. Everything is back to normal and you can retry the installation.

### Joomla! 1.6 says "can't build admin menu" and fails

On some other occasions, especially when trying to install or update the component after an installation error, Joomla! will complain that it **can not build admin menus**. This is due to another Joomla! 1.6 bug we have sent a patch for [[http://joomlacode.org/gf/project/joomla/tracker/?action=TrackerItemEdit&tracker\\_item\\_id=25663](http://joomlacode.org/gf/project/joomla/tracker/?action=TrackerItemEdit&tracker_item_id=25663)] to the Joomla! development team. Meanwhile, you will have to run a few SQL statements against your database with a database editor such as phpMyAdmin:

```
DELETE FROM jos_assets WHERE `name` = 'com_akeebasubs';  
DELETE FROM jos_menu WHERE `menutype` = 'main' AND `alias` = 'com_akeebasubs';  
DELETE FROM jos_extensions WHERE `type` = 'component' AND `element` = 'com_akeebasubs';
```

Remember to change *jos\_* with your database tables' name prefix if you changed it during installation! It's easy to find out what it is. Take a look at the database and you'll see that all of your tables begin with the same few letters. That's your prefix. After running those SQL statements you can proceed with the reinstallation of the component.

## Version check

Check your Joomla! version. Joomla! 1.5.0 through 1.5.10 can not install Akeeba Subscriptions. This is a limitation of these extremely outdated releases. If you have such a site, upgrade it. Joomla! 1.5.11 through 1.5.14 may or may not be able to install Akeeba Subscriptions. Again, these are limitations of those outdated Joomla! releases on certain hosts. The only workaround is to upgrade your Joomla! installation.

If you have Joomla! 1.6 make sure that you are using Joomla! 1.6.0 (the "stable" release, not the RC or any of the betas). Mind you, we have only tested the installation with Joomla! 1.6.2 and later releases.

## Checking your temporary directory

First, we will have to make sure that you are using a valid temporary directory. Many sites are configured to use the system-wide (/tmp) directory or an invalid directory, causing installation problems. In order to change your site's temporary directory setting you have to follow this procedure, depending on your Joomla! version.

### Joomla! 1.5

1. Go to your site's administrator back-end and click Help, System Info from the top menu.

2. Click on the Directory permissions link
3. Scroll down the page and find the first Cache Directory line. It is the fourth from the bottom of the page.
4. Next to the Cache directory label you can see a path, e.g. `/home/myuser/public_html/cache`
5. Replace the `cache` word with `tmp` in that path, i.e. `/home/myuser/public_html/tmp` and note down this path. This is your new temp path.
6. Go to Site, Global Configuration menu item from the top menu.
7. Click on the Server link
8. Find the "Path to Temp-folder" and replace its contents with the new temp path from step #5.
9. Save your Global Configuration

## Joomla! 1.6

1. Create a file named `mynewtmp.php` with the following contents:

```
<?php echo dirname(__FILE__) . '/tmp';
```
2. Upload the file to your site and access it as `http://www.example.com/mynewtmp.php` where `www.example.com` is the domain name to your site.
3. Write down what you see on the screen. That's your new temporary directory path.
4. Remove the `mynewtmp.php` file from your site.
5. Go to your site's administrator back-end and click on Site, Global Configuration menu item from the top menu.
6. Click on the Server link
7. Find the "Path to Temp-folder" and replace its contents with the new temp path from step #3.
8. Save your Global Configuration

## Enable FTP

On most shared hosts which do not run suPHP (if you didn't understand anything, most likely the following *is applicable to you too*) you have to enable Joomla!'s FTP layer. Otherwise Joomla! won't be able to write the files to its directories and installation will fail.

1. Go to Site, Global Configuration menu item from the top menu.
2. Click on the Server tab
3. Set Enable FTP to Yes
4. In the FTP Host try using `127.0.0.1` or `localhost` or the FTP hostname assigned by your host
5. In the FTP Username and FTP Password fields provide the FTP username and password assigned by your host
6. In the FTP Root you have to type in the FTP path to your site's root. Here is the easy way to find it using FileZilla [<http://filezilla-project.org/download.php>]:

Connect to your site using FileZilla. Navigate inside the folder Joomla! is installed in. Usually it's a directory named `public_html`, `htdocs`, `www` or something similar. If unsure don't ask us, ask your host. Now, on the right-hand

pane you will find the FTP path. Most likely it will look something like `/public_html`. Copy this and paste it into the FTP Root text box in your Joomla!'s Global Configuration page.

7. Save your Global Configuration. If you got everything correctly, you should see a message that your configuration was saved. If you see an error message please seek assistance on the Joomla! Forum [<http://forum.joomla.org>].

## Manual installation

Sometimes Joomla!™ is unable to properly extract ZIP archives due to technical limitations on your server. In this case, you can follow a manual installation procedure.

First, you have to extract the installation ZIP file in a subdirectory named `akeeba` on your local PC. Then, upload the entire subdirectory inside your site's temporary directory. At this point, there should be a subdirectory named `akeeba` inside your site's temporary directory which contains all of the ZIP package's files.

If you are unsure where your site's temporary directory is located, you can look it up by going to the Global Configuration, click on the Server tab and take a look at the Path to Temp-folder setting. The default setting is the `tmp` directory under your site's root. Rarely, especially on automated installations using Fantastico, this might have been assigned the system-wide `/tmp` directory. In this case, please consult your host for instructions on how to upload files inside this directory, or read the instructions above about changing your Joomla!™ temporary directory back to the default location and making it writable.

Assuming that you are past this uploading step, click on the Extensions, Install/Uninstall (Joomla! 1.5) or Extensions, Manage (Joomla! 1.6 users) link on the top menu. In this page, locate the Install Directory edit box in the Install from Directory area. It is already filled in with the absolute path to your temporary directory, for example `/var/www/joomla/tmp`. Please append `/akeeba` to it. As per our example, it should look something like `/var/www/joomla/tmp/akeeba`. Then, click on the Install button.

## Still problems?

If you still can't install Akeeba Subscriptions and you are receiving messages regarding unwritable directories, inability to move files or other similar file system related error messages, please do not ask us for support. These errors stem from your site set up and can best be resolved by asking for help in the official Joomla!™ forums [<http://forum.joomla.org>]. We can only support software we develop ourselves. Joomla!'s extension installer is certainly not developed by us and –believe us– we have tried to improve it and submitted some still pending patches to the Joomla! project. Therefore we regret that we have to say that, but we can't help you. Thank you for your understanding.



---

# Chapter 2. Initial set-up and usage

## 1. How subscriptions work

Before you begin setting up Akeeba Subscriptions, you should be aware of the way subscriptions work under the hood. The most basic concept is the subscription level (referred to simply as Level from now on). This is what you are selling to your customers. Your customers buy a subscription to a Level. The composite piece of information containing the Level, payment information and expiration time is called a Subscription.

When a user enters the subscription page, Akeeba Subscriptions first fetches the price associated with the Level your user wants to buy. It will then try to understand if there is an applicable discount. First, it will look into Upgrade definitions and produce a list of upgrade rules applicable for the user and the Level he wishes to buy. If there are multiple applicable upgrade rules, the one giving the maximum discount is elected. Next up, it takes a look at the coupon code, is supplied. If it is an active coupon and your user can use it to get a discount, the coupon's discount is calculated. In the case where there are two discounts, both an upgrade discount and a coupon discount, the highest one is elected. The level price minus the discount is called the Net Price.

Right up, Akeeba Subscriptions will try to determine the applicable tax by going through all the tax rules. It will go through the tax rules and keep the one which is the closest match to the country, zip code, city and VIES registration status. If no match is found, Akeeba Subscriptions will select the tax rate defined in the very first tax rule you have defined. This is called the Tax Amount. The sum of the Net Price and Tax Amount is the Gross Amount and that's what the user will have to pay.

When the user hits the Subscribe button, Akeeba Subscriptions will first check if this is a new or existing user. If it is a new user, it will create a new –but inactive– user account based on the information the user has supplied. A new, inactive subscription will be created for your user and he's redirected to the payment gateway. Exception: if you have an 100% or more discount (which means that the user shall pay nothing) he's not redirected to the payment gateway. Instead, he's redirected to the Subscription Confirmation page and his subscription becomes instantly active.

Once the user finishes the payment, he's redirected to the Subscription Confirmation page. If he changes his mind and cancels the payment, he will be takes to the Subscription Cancellation page. The text on each page is determined by the relevant fields in the Level configuration.

At the same time, your payment processor will send a post-back to your site, notifying Akeeba Subscriptions about the payment status. If the payment is marked as complete, the subscription is activated. Its start and expiration date are calculated based on the exact date and time that the payment post-back was received and the Level's configured length. If the associated user account was marked as blocked (inactive), it is activated. If any integrations are set up, they will run. For example, you may be adding users to JUGA groups upon a successful subscription.

Based on the above, you need to configure the following –in the order shown– for Akeeba Subscriptions to work:

- Configuration Options - well, that's just the currency you're selling in!
- Subscription Levels - the subscription products you are selling, i.e. your inventory
- Tax Rules - determine if the user has to be charged taxes over the subscription amount and how much that will be
- Upgrade rules - (optional) discounts based on what other products the user has bought and how long he's been a subscriber to them
- Coupons - (optional) discount codes used for promotions

Alternatively, you can import Subscription Levels and Coupons from other subscription systems instead of manually defining them.

The sections below will tell you how to go through each of these steps.

## 2. Configuration options

Click on Configuration in the toolbar links area. The available options are:

**Currency code** The three letter ISO 4217 currency code [<http://www.xe.com/iso4217.php>]. Common values are EUR (Euro), USD (United States Dollar), GBP (Great Britain Pound), CAD (Canada Dollar), AUD (Australia Dollar), JPY (Japan Yen), CNY (China Yuan) and MXN (Mexico, Pesos). This is used on virtually all of the payment processors to notify them about the currency you're selling your goods in. Please remember that all of your payment processors must support the selected currency. Some payment processors only accept a subset of currencies, most usually only one of USD, GBP and EUR.

Default: EUR (Euro)

**Currency Symbol** The currency symbol to be shown to your web visitors, e.g. € for Euro, £ for British Pound, \$ for US/Australia/Canada Dollar or ¥ for Japan Yen. This is free form text used to prefix the prices. If your currency has no special symbol you can use text to describe it, or leave blank to completely omit the currency symbol display throughout the components.

Default: € (Euro symbol)

## 3. Subscription Levels

You can access this feature by clicking on Subscription Levels in the toolbar links area.

Creating or editing a Subscription Level, you have these options:

**Title** How the subscription will be presented to your users. We strongly suggest using all-capital letters and no spaces for easier administration, albeit you can really use anything you like.

**Image** Select a picture to represent your subscription. The image must be located in your site's images/stories (Joomla! 1.5) or images (Joomla! 1.6) directory.

**Subscription Length (days)** How many days a subscription in this level lasts. Common values are 30 (one month), 180 (half a year) and 365 (one year).

**Price** The price of a subscription in this level. If you need to enter a decimal value, use a dot as the decimal separator. For example, 12.30 is valid, whereas 12,30 is INVALID and will be interpreted as 1230. Do NOT use a thousands separator. For example 1000 is valid, whereas 1,000 is INVALID.

**Slug** The alias, used to construct the URL. Use only lowercase Latin characters without diacritics and accents, dashes and underscores. For example uber-sub is valid, whereas über SUB is INVALID.

**Published** Should it be shown to your users?

**Short Description** A description of the subscription to show to your users. Keep it short (ca. 30 words or less) or it will overflow the boundaries of the subscription presentation areas in the front-end.

**Message to show after successful sign-up** The text in this area will be presented to the users after they successfully complete their payment. Use it to thank them for giving you their money and show them important information about their subscription, e.g. links to your support method, download links etc.

## Warning

Do not include any sensitive information (such as "secret" download links) as the content of this page can be directly accessed by a knowledgeable user by manipulating the URL. If you want to include such information, please use the Restricted Content plugin bundled with Akeeba Subscriptions to make sure that the information will only be shown to users holding a valid subscription.

Message to show after sign-up cancellation	The text in this area will be presented to the users after they cancel their payment (if your payment gateway supports this feature). This is your last attempt to changing your user's mind or have them give you feedback on the reasons they decided to not move forward with their subscription. Use it wisely and do not insult your users, please :)
--------------------------------------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

## 4. Tax Rules

You can access this feature by clicking on Tax Rules in the toolbar links area.

Out of the box, Akeeba Subscriptions is set up to not apply any VAT or other tax at all. However, this is not what most users would like. Below we are providing the most common setups based on your business type. Our lawyers told us that we have to say this to you: Please note that we are not lawyers or tax technicians. As a result, our advice is based on our personal experience, may be flawed and in no way should be considered a legal or financial advice. Should you chose to use it you do so at your own risk. We strongly advise you to ask a qualified tax technician, lawyer or other relevant professional qualified by law to give you advice regarding tax laws. That said, here's the most common tax setups:

### Extra-EU businesses, e.g. US based

Tax Rules determine if the user should be charged a tax amount on top of the regular price of the subscription level. If you do not wish to charge any taxes (e.g. you have already included any applicable taxes in your subscription price), you will still have to create a default rule with 0 tax charges. In order to do so, click on the New button, select the "- Select -" option in the Country drop-down and set the tax rate to 0, then click on Save. Now you have created a catch-all rule with 0% tax. Likewise, if you want to charge all users a flat tax rate, say 18%, do the same thing, but set the tax rate to your desired percentage, in our case 18 (note: without the % sign!) and click on Save.

### Intra-EU businesses with a VIES registered VAT number, or extra-EU businesses with an EU VAT number

If you are a business based in the European Union with a VIES-registered VAT number you have to create a total of 30 rules to conform to the overcomplicated EU tax regulations. First, create a default rule with 0% tax as noted above. Then do the same thing, but set the VIES Reg option to Yes and the tax rate to 0%. Now create new tax rules for each one of these countries, VIES Reg set to No and tax rate set to your local VAT tax rate (e.g. 23% for Greece): United Kingdom, Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Germany, Greece, Denmark, Estonia, Spain, Finland, France, Hungary, Ireland, Italy, Lithuania, Luxembourg, Latvia, Malta, Netherlands, Poland, Portugal, Romania, Sweden, Slovenia, Slovakia. For the country of your business (e.g. Greece for a Greece-based business) create on more rule with VIES Reg set to Yes and the tax rate set to your local VAT tax rate (e.g. 23% for Greece). This way, the following happens:

- If the customer is extra-EU he will be charged no VAT
- If the customer is an intra-EU business, he will be charged no VAT (he's liable to VAT on his local tax authorities, not your country's tax authorities)

- If the customer is intra-EU, but not a business with a VIES-registered VAT number, he's paying VAT.
- If the customer is coming from your own country, you are charging him with VAT no matter what.

Do note that the same setup is required if you are an extra-EU business –e.g. US-based– with an EU VAT ID (it's in the format EU012345678). In this case, you have no EU country of residence, so you can skip the last tax rule mentioned above.

## Intra-EU businesses without a VIES-registered VAT number

Please ask your lawyer whether it's legal for you to sell subscriptions to residents of a country other than yours. There is a gap in the EU directives regarding that case, therefore we can't provide you with even semi-accurate tax setup information within any stretch of imagination.

## Tax Rule options

Each tax rule has the following options:

Country	Which country this tax rule is applicable in. If empty (the "-" Select "-" pseudo-option of the country list) it applies to all countries.
State	Which state this tax rule is applicable in. Note: only US and Canada states and provinces can be selected. If left empty (the N/A option) it applies to all states.
City	Which city this tax rule is applicable in. Do note that the spelling of the city must match, but it's case insensitive. This means that new york, NEW YORK and New York are equivalent. Leave blank to match all cities.
VIES Reg	If set to Yes, the tax rule matches only those clients with a valid, VIES registered EU VAT number. If you don't know what VIES registration is, read this [ <a href="http://ec.europa.eu/taxation_customs/taxation/vat/traders/vat_number/index_en.htm">http://ec.europa.eu/taxation_customs/taxation/vat/traders/vat_number/index_en.htm</a> ]. You can verify if a VAT number of an EU resident or EU registered business is also VIES registered through EU's official web application on Europa.eu [ <a href="http://ec.europa.eu/taxation_customs/vies/">http://ec.europa.eu/taxation_customs/vies/</a> ].
Tax Rate	The tax rate percentage. If you need to enter decimal digits, use a dot not a comma. For example, 17.5 is valid, 17,5 is INVALID. Do NOT type the percentage sign. For example, 23 is valid, 23% is INVALID. The percentage is always implied, that's why it's printed after the field's contents.
Enabled	If set to Yes, the VAT Rule will be applied, otherwise it will be ignored (as if it weren't set at all)

## 5. Upgrade Rules

You can access this feature by clicking on Upgrades in the toolbar links area.

This feature allows you to create automatically applied discount rules to reward your loyal customers by giving them a discount. If you are not sure this is what you want to do, I strongly suggest reading Seth Godin's "How should you treat your best customers?" [[http://sethgodin.typepad.com/seths\\_blog/2011/02/how-should-you-treat-your-best-customers.html](http://sethgodin.typepad.com/seths_blog/2011/02/how-should-you-treat-your-best-customers.html)] and view this video of his [<http://www.attorneymarketing.com/2010/04/25/seth-godin-explains-how-to-build-a-tribe-of-loyal-clients/>] where he explains his ideas on small businesses even more clearly.

Each Upgrade rule has the following options:

Title	Just a title to remind you of what this upgrade rule does
Published	If set to No, it won't be taken into account during a new subscription's price calculation
From level	The subscription level for which the user must already have a valid subscription in order for the upgrade rule to take effect
To Level	The subscription level which the user is currently trying to subscribe to and onto which the discount will be applied
Min. Presence	The minimum number of days the user has to have a valid subscription to From Level for this rule to be applied
Max. Presence	The maximum number of days the user has to have a valid subscription to From Level for this rule to be applied
Discount Type	If it's Value, the Value field contains currency, e.g. if you're using Euros and type a value of 20 then 20 Euros will be subtracted from the price. If it's Percent, then the Value field contains a percentage, e.g. if you type a value of 20 then a 20% discount will be applied to the price.
Value	See above.

Practical examples of upgrade rules:

You want to give a 30% discount to users with a SUB1 annual subscription if they renew up to 30 days before their subscription expiration. Both levels set to SUB1, min presence is set to 0, max presence is set to 335 (one year is 365 days, minus 30 days, equals 335 days), discount type Percent, value 30.

You want to give a 15% discount to users with a SUB1 annual subscription if they renew during the last 30 days of their subscription. Both levels set to SUB1, min presence is set to 335 (one year is 365 days, minus 30 days, equals 335 days), max presence set to 365 (one full year) discount type Percent, value 15.

You want to give a 10 Euro discount to users with a SUB1 annual subscription who are now buying a SUB2 subscription. From Level set to SUB1, To Level set to SUB2, min presence set to 0, max presence set to 365 (one year), discount set to Value, value set to 10.

You want users buying both SUB1 and SUB2 to have a 10 Euro discount. First, create a rule like in the previous example. Then create another rule with From Level set to SUB2, To Level set to SUB1, min presence set to 0, max presence set to 365, discount set to Value, value set to 10. This way, whichever subscription they buy first, they'll get the discount when they buy the other subscription as well.

You want to give a complimentary (free) SUB3 subscription to users who have already bought SUB1 and SUB2: you can't do that with Upgrade Rules, as you can not combine multiple subscriptions in a single rule. Instead, use a coupon code with 100% discount and show this coupon code only to subscribers who have already bought a SUB1 and SUB2 subscription using the Restricted Content plugin bundled with Akeeba Subscriptions.

## 6. Coupons

You can access this feature by clicking on Coupons in the toolbar links area.

This feature allows you to create discount coupon codes. When a user enters a valid coupon code during registration, it's subtracted from the price of his subscription. You can let coupons work on specific subscriptions, specific users, for a predefined time period or even for a predefined number of times before becoming inactive. You can even create 100% discount coupons for giveaways or other similar promotional reasons.

Each coupon supports the following fields:

Title	A descriptive title for your coupon. It is only displayed to you, it is not displayed to your users.
Coupon code	The coupon code which the user has to enter in order to receive the discount. Very important: coupon codes are case insensitive, therefore it's best to type them in all capital letters. Moreover, we suggest using only capital Latin letters without accents or diacretics and numbers, so that all users can type them in using their keyboard.
Discount type	You can either specify Percent (give an X% discount over the price) or Value (deducts X from the price). It works in conjunction with the Value field below. For example, if you are using Euros as your currency, you set Value here and type in a value of 10, the coupon gives 10 Euro discount.
Discount value	See above
Published	Set to Yes for the coupon to become active
Hits	This is the number of times this coupon has been used.
Valid from	When the coupon will become active (note: the date is expressed in the GMT/UTC timezone). Leave blank or set to 0000-00-00 00:00:00 to make the coupon active right now. Note: a published coupon will not be taken into account before its Valid From date.
Valid to	When the coupon will become inactive (note: the date is expressed in the GMT/UTC timezone). Leave blank or set to 0000-00-00 00:00:00 to let Akeeba Subscriptions ignore this field and let the coupon active until you manually unpublish it. Note: a published coupon will not be taken into account after its Valid To date.
Limit to a specific user	Click on Select to pick a user for which the coupon will be active. For all other users the coupon will have no effect. Leave blank to let all users –even new ones– to use the coupon.
Subscription Levels	Choose the subscription levels which the coupon code can be applied to. Leave it blank (or make sure that only the – Select – pseudo-option is selected) to let Akeeba Subscriptions apply the coupon to all current and future subscription levels you are offering on your site.
Hits limit	If it is greater than zero, the coupon can be used up to this number of times before it becomes inactive. In other words, when the Hits counter becomes equal to Hits Limit, the coupon can no longer be used by anyone. Leave it blank to not apply any such limit.

## 7. Subscriptions management

You can access this feature by clicking on Subscriptions in the toolbar links area.

This is a standard Joomla! administrator page which needs no explanation.

The icons on the left hand side of the user information are Gravatars. If the user has linked a Gravatar to their email address, it is displayed next to their name, otherwise a default avatar (head-shaped cut out) is displayed.

In order to edit a subscription, click on the leftmost column (the numeric ID) of the subscription record. Clicking on the other links will edit the respective item, i.e. clicking on the subscription level will open the subscription level editor.

You can use the Run Integrations button any time in order to have Akeeba Subscriptions re-process all integrations with third party components. This is useful when you suspect an integration has gone wrong, you changed the options in an integration plugin or you just imported a large number of subscriptions.

Using the CSV button allows you to export the current view into a CSV file for further processing in a spreadsheet application such as Microsoft Office Excel, Apple Numbers or OpenOffice.org Calc. Do note that the full set of raw data is dumped to the CSV file.

## 8. Front-end items

There are four types of front-end menu items you can create:

Subscribe • Specific Level	Allows you to create a menu link to the subscription page of a specific Subscription Level
Subscription Levels • Awesome Layout	Presents a list of all available subscription levels in a comparison table, using CSS3 styling. It's the most eye-catching presentation layout and it's best to use only if you have a small number of subscription levels (4 to 5)
Subscription Levels • All Levels	Presents a list of all available subscription levels as a two column list of boxes. It is a relatively dull presentation mode, but is suitable for a very large number of subscription levels (over 6)
My subscriptions • All of my subscriptions	Think of it as a kind of "My Account" page. It shows the user all of his subscriptions and allows him to review the information on each one of them, as well as renew them.

The subscription page defines two module positions where you can publish modules to further expand the information presented on the page. Publishing modules in the `akeebasubscriptionsheader` position will make them appear at the very top of the page, right above the Steps bar. That's a good place to publish information about SSL security or banners about your latest special offers. Publishing modules in the `akeebasubscriptionsfooter` position will make them appear right after the end of the subscription form. This is a good place to put a custom HTML module with links to your terms of service, business contact information, etc.

## 9. Importing from other components

Most likely you are already using a subscriptions system and wouldn't like to have to manually import all of your subscriptions to Akeeba Subscriptions. That's why we are offering an automated import feature. You can access it from Akeeba Subscription's dashboard page, by clicking on the Operations tab, and then on Import.

The options are:

**AMBRA.Subscriptions** imports subscription levels and subscriptions from Dioscouri's AMBRA Subscriptions (a.k.a. AMBRA.subs)

**AMBRA.Subscriptions with PayPal with VAT plugin** If you are using AMBRA.subs with my modified "PayPal with VAT" payment plugin and the customizations for integrating coupons into AMBRA.subs, you can click on this option. It will import subscription levels, subscriptions and any coupon codes defined. Moreover, it will also import the extra data stored per user, e.g. their address and VAT number.

### Warning

Importing from other components will **DELETE AND REPLACE ANY AND ALL EXISTING DATA IN AKEEBA SUBSCRIPTIONS**. There is **NO TURNING BACK**. Do **NOT** use this option after you have been using Akeeba Subscriptions and have new subscribers on your site.

Please remember to review your Subscription Levels after import. Most notably, the text of the subscription completion and subscription cancellation pages will be missing from all subscription levels.

---

# Chapter 3. Payment methods, integrations and plugins

Akeeba Subscriptions is designed to be a modular system, powered by standard Joomla! plugins. Using plugins you can add payment methods as well as integration with third party software. Moreover, core functionality of Akeeba Subscriptions (like sending out emails upon subscription or email reminders for subscription expiration) is taken care of by plugins. This documentation chapter will guide you through the details of each plugin.

## 1. Payment methods

All payment methods are standard Joomla! plugins, belonging to the `akpayment` group. If you want to enable a payment method, just publish the relevant plugin.

### 1.1. Paypal

Displayed in the Plugins Manager as: Akeeba Subscriptions Payment - Paypal

This payment method integrates the standard PayPal Website Payments service, available without any setup fee to all verified PayPal clients. In other words, that's the standard way to use PayPal as your payment processor. The options you have in this plugin are:

Payment option title	Leave blank to use "PayPal" or type in a custom name to show to your customer's, e.g. "PayPal, bank account or Credit Card"
Merchant ID	Your PayPal email address or your secure merchant ID (if PayPal has assigned you with one)
Secure POST	If enabled, the verification postback to PayPal will be over an SSL connection. In order for this to work, your host needs to support SSL connections using cURL to PayPal's IP address block.
Sandbox	When enabled, transactions are processed by PayPal Sandbox, i.e. PayPal's testing mode. This is designed for integration tests, BEFORE going live with your site. <b>NEVER, EVER, NO MATTER WHAT YOU DO, SHOULD YOU NOT ENABLE THIS ON PRODUCTION SITES! IF YOU DO, YOU WILL LOSE MONEY AND/OR CUSTOMERS.</b>
Sandbox merchant	The dummy merchant email used with PayPal's Sandbox.
PayPal Callback Text	(optional) Normally, when the user completes the payment, PayPal shows him a button with the default label "Return to Merchant". If you type in something in here, it will be shown on that button instead of the default label. For example, you can type in something like "Return to Example.com"
Custom Header Image	(optional) The URL to an image to be shown on PayPal's checkout page header. It'd better be hosted on an HTTPS URL, otherwise your customers will get a warning about insecure content on their browser.
Header Background Color	The hex code of PayPal checkout page's header background color. For example, white is FFFFFFFF (note: there is no # sign in front of the hex color code!)
Header Border Color	The hex code of PayPal checkout page's header border color. For example, light gray is CCCCCC (note: there is no # sign in front of the hex color code!)



## 1.2. None

Displayed in the Plugins Manager as: Akeeba Subscriptions Payment - None

This is a dummy payment plugin which immediately activates a subscription without payment.

### Warning

DO NOT USE THIS ON PRODUCTION SITES. IT IS MEANT FOR TESTING PURPOSES ONLY. ENABLING IT ON A PRODUCTION SITE ALLOWS ANYONE, INCLUDING UNREGISTERED USERS, TO SUBSCRIBE TO ANY SUBSCRIPTION THEY WANT **WITHOUT PAYING ANYTHING AT ALL**. You have been strongly warned.

## 2. Integration with third party software

One of the most important aspects about subscription systems is their ability to integrate with third party software. A subscription all by itself means pretty much nothing. It's just a "flag". The added value is when this subscription allows the user holding it to actually do something on the site. At this point in time, there are only a handful of integrations. If you are interested in more integrations let us know and we'll add them to our implementation to-do list.

All integrations with third party applications are standard Joomla! plugins, published in the akeebasubs group.

### 2.1. JUGA Integration

Displayed in the Plugins Manager as: Akeeba Subscriptions - JUGA Integration

This integration plugin allows you to add and remove users from JUGA groups based on their subscription status. Please note that this is a smart integration; instead of adding users when a subscription goes active and removing them when a subscription goes inactive, Akeeba Subscriptions plugins take a look at all of the user's active and inactive subscriptions and decide which groups the user should be added to or removed from. The idea is this:

1. All groups to be added to, based on active subscriptions of the user, are assembled to the ADD list.
2. All groups to be removed from, based on inactive subscriptions of the user, are assembled to the REMOVE list.
3. If a JUGA group appears in both the ADD and REMOVE list, it is deleted from the REMOVE list. In other words "add" trumps "delete". In order to understand this further, here's the deal. If one subscription with access to a JUGA group expires, but another subscription granting access to the very same group is still active, the user's access to this group must remain active.

The plugin has these options:

Add to JUGA groups	This is a list for assigning subscription levels to JUGA groups. When a user has an active subscription to the specified level, he'll be added to the JUA group mentioned on the right hand of the equal sign. Each assignment is done like this:
--------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

```
LEVEL1=Group 1,Group 2,Group 3
```

Where LEVEL1 is the Title of the subscription level and Group 1, Group 2 and Group 3 are the names of the JUGA groups you want to add a user to when he subscribes. If you want to assign multiple subscription levels to multiple groups, you have to do something like that (separate multiple lines with a single press of the ENTER key on your keyboard):

```
LEVEL1=Group 1,Group 2,Group 3
LEVEL2=Group 2
```

```
LEVEL3=Group 4,Group 1
```

You can also use the numeric IDs of subscription levels or JUGA groups instead of their titles. However, we consider working with numeric IDs very counter-intuitive.

Remove from  
JUGA groups

Likewise, this is the list of the JUGA groups to remove a user from when his subscription to the specified level is no longer active. Do note that you can specify a different set of groups to remove the user from than the ones you are adding him to. For example:

```
LEVEL1=Group 1,Group 2
```

```
LEVEL2=Group 2
```

```
LEVEL3=Group 1
```

In this example, together with the rules displayed in "Add to JUGA groups", when a subscription to the LEVEL1 level expires, the user will still belong to JUGA's Group 3, as it's not removed from his account; only Group 1 and Group 2 are removed. Likewise, if the user has an expired LEVEL1 subscription and an active LEVEL2 subscription he'll now belong to Group 2 and Group 3: Group 3 because it's not removed when his subscription expires and Group 2 because his active LEVEL2 subscription suggests that he should be granted Group 2 access despite his expired LEVEL1 subscription.

If you find this hard to understand, join the club. ACLs are not meant to be easy to setup or understand. It's a power feature and, as such, poses a great difficulty to even the most seasoned web site integrators. Take your time and experiment on a dev copy of your site before going live.

## 3. Other plugins

Akeeba Subscriptions comes with more standard Joomla! plugins which accomplish a variety of tasks, from email communications to content filtering.

### 3.1. Subscription expiration control

Displayed in the Plugins Manager as: **System - Akeeba Subscriptions Expiration Control**

Akeeba Subscriptions will automatically expire your users' subscriptions when they visit a page with an Akeeba Subscriptions module on your site after their subscription expiration date. However, if you want subscription expiration to be performed automatically, you need to publish this plugin. It will fire once per day, expiring subscriptions past their expiration date. We strongly recommend publishing this plugin at all times.

### 3.2. Subscription emails

Displayed in the Plugins Manager as: Akeeba Subscriptions - Emails

When this plugin is published, an email will be sent out to the user when any of these events takes place:

- A new subscription is created
- The payment status changes, e.g. the user completes the payment, or a delayed payment is marked as completed or cancelled.
- A subscription expires and becomes inactive

#### Note

This plugin uses Joomla!'s mail system. You have to ensure that your site can send out emails (e.g. use the Mass Mail feature to send a test email to Super Administrators) before activating this plugin.

We strongly recommend publishing this plugin at all times.

### 3.3. Subscription expiration notification

Displayed in the Plugins Manager as: System - Akeeba Subscriptions Expiration Notification

This plugin will notify a user 30 and 15 days before his subscription's expiration. These time limits are non-configurable in this release.

#### Note

This plugin uses Joomla!'s mail system. You have to ensure that your site can send out emails (e.g. use the Mass Mail feature to send a test email to Super Administrators) before activating this plugin.

We strongly recommend publishing this plugin at all times.

### 3.4. Content restriction

Displayed in the Plugins Manager as: Content - Akeeba Subscriptions Restricted

This content plugin allows you to show parts of your content only to specific subscribers. This is a very powerful feature that allows you to alter the displayed content based on the user's subscription status.

#### Note

It can not "hide" entire articles, e.g. not show them at all to non-subscribers. At best, only the title will be shown. If you want to completely hide articles and block unsubscribed user access to entire categories or sections you will have to use an ACL solution, like Dioscouri's JUGA, NoixACL or similar.

Its syntax is:

```
{akeebasubs expression}Your content{/akeebasubs}
```

This means that "Your content" will only be displayed to users whose subscriptions satisfy the *expression*. In the simplest form, expression is just the name of a subscription level, e.g.

```
{akeebasubs LEVEL1}Your content{/akeebasubs}
```

If you want to present the content to someone who holds an active subscription to both LEVEL1 and LEVEL2, you can use the && (logic and) operator:

```
{akeebasubs LEVEL1 && LEVEL2}Your content{/akeebasubs}
```

Likewise, you can use the || (logic or) operator to present the content to anyone who has a subscription to any of LEVEL3 or LEVEL4 levels:

```
{akeebasubs LEVEL3 || LEVEL4}Your content{/akeebasubs}
```

Important note: The logical OR consists of two "pipe" symbols. These are not the same as capital I! On a Mac's keyboard, the pipe symbol is present next to the ENTER key, accessible by pressing SHIFT-\. On most Windows/Linux machines, this key is usually somewhere near the ENTER key and is most likely accessible by pressing SHIFT-| as well.

You can also negate the logic. For example, you can present the content to anyone having a subscription to neither LEVEL1 nor LEVEL3 by using the ! (logical not) operator:

```
{akeebasubs !LEVEL1 && !LEVEL3}Your content{/akeebasubs}
```

If you specify multiple operators, the precedence is NOT, AND, OR. This means that the exclamation mark is processed first, the ampersands second and the bars last. Example:

```
{akeebasubs !LEVEL1 || LEVEL2 && !LEVEL3}Your content{/akeebasubs}
```

This means that the content will be presented to users who do not have a subscription to LEVEL1. Also, if they do have a LEVEL1 subscription and they are also LEVEL2 (but not LEVEL3) subscribers the content will also be shown to them.

---

# Chapter 4. Akeeba Subscriptions' modules

Akeeba Subscriptions comes with a variety of modules to display customized lists of subscription levels or a list of a user's subscriptions. Make sure you visit your Module Manager page and have a look at them. You can create interesting effects, like a customized and categorized subscriptions list page, out of those modules.

– THIS DOCUMENTATION SECTION IS UNDER CONSTRUCTION –