

PAYPAL RECURRING PAYMENT

USER GUIDE

Version 1.1.0

Do you run a subscription service that needs to invoice customers and collect payments regularly? Are you interested in doing this over the web?

Welcome to PayPal Recurring Payment Extension for Magento 2 developed by Sparsh.

We have provided this guide to understand better use of this extension.

This extension is used for making recurring payments easy so that your customers can make the payments with no hassle.

All you have to do is to put some PayPal credentials in the back-end and set recurring options on the product page.

KEY FEATURES:

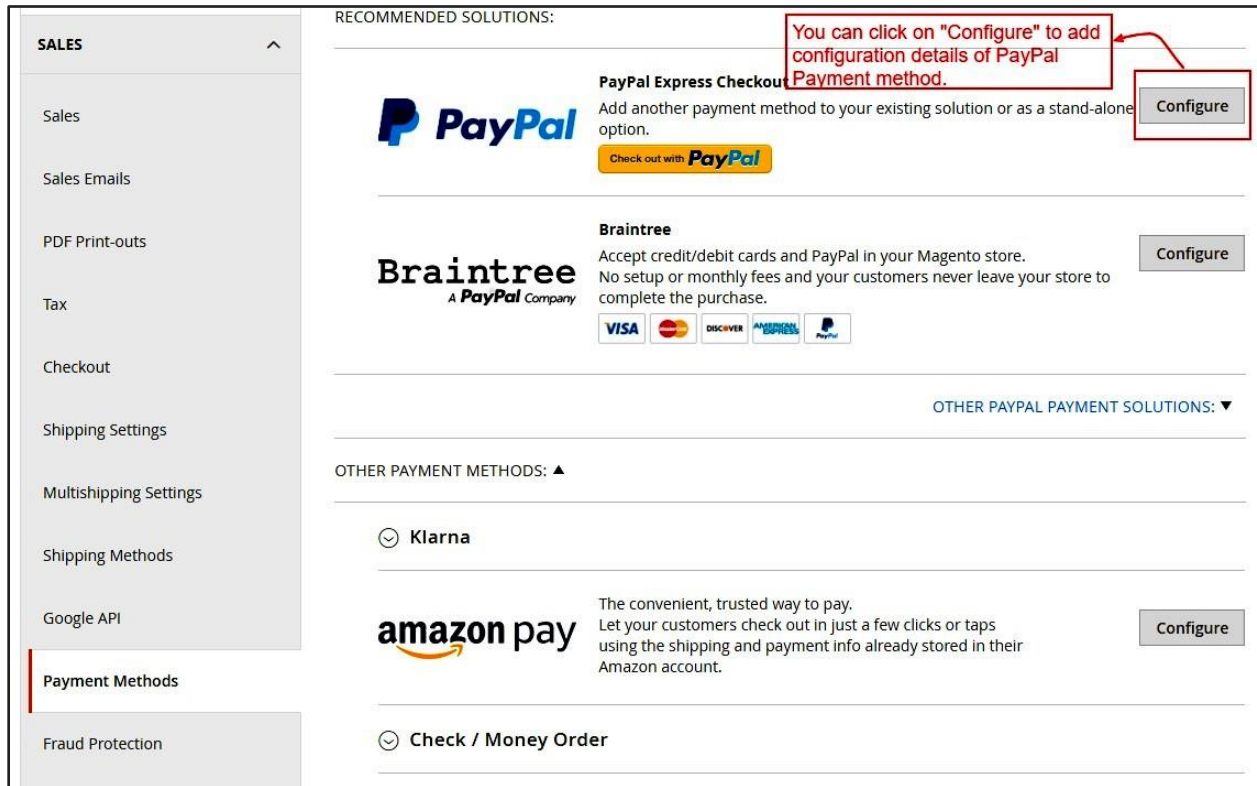
- It supports online recurring payment with PayPal express checkout.
- Admin can enable/disable recurring payment per product.
- Admin can define the trial period, initial amount, auto bill, number of allowed failures, etc...
- Customer can find all subscription details and transaction history from his/her account.
- Customer can view/active/suspend/unsubscribe to their subscriptions.
- Admin can view/active/suspend/unsubscribe any customer subscription.
- Admin can find all subscriptions for any particular customer.
- Only one subscription product can be added to cart per transaction.
- Recurring options are not available for “Downloadable” type products.

Follow given below steps to add recurring payment from admin dashboard:

1. HOW TO ENABLE PAYPAL EXPRESS CONFIGURATION

To enable recurring payment on store front, admin needs to enable PayPal Express Checkout method with proper configuration.

Go to Magento 2 Admin > Login > Stores > Configuration > Sales > Payment Methods > PayPal Express Checkout.



SALES

- Sales
- Sales Emails
- PDF Print-outs
- Tax
- Checkout
- Shipping Settings
- Multishipping Settings
- Shipping Methods
- Google API
- Payment Methods**
- Fraud Protection

RECOMMENDED SOLUTIONS:

PayPal Express Checkout
Add another payment method to your existing solution or as a stand-alone option.
Check out with **PayPal**
Configure

Braintree
Accept credit/debit cards and PayPal in your Magento store. No setup or monthly fees and your customers never leave your store to complete the purchase.
VISA, MasterCard, DISCOVER, AMERICAN EXPRESS, PayPal
Configure

OTHER PAYPAL PAYMENT SOLUTIONS: ▼

OTHER PAYMENT METHODS: ▲

Klarna

amazon pay
The convenient, trusted way to pay. Let your customers check out in just a few clicks or taps using the shipping and payment info already stored in their Amazon account.
Configure

Check / Money Order

Expand the **Required PayPal Settings** section, and do the following:

- Enter the **Email Address** that is associated with your PayPal merchant account.

Email addresses are case sensitive. To receive payment, the email address you enter must match the email address specified in your PayPal merchant account.

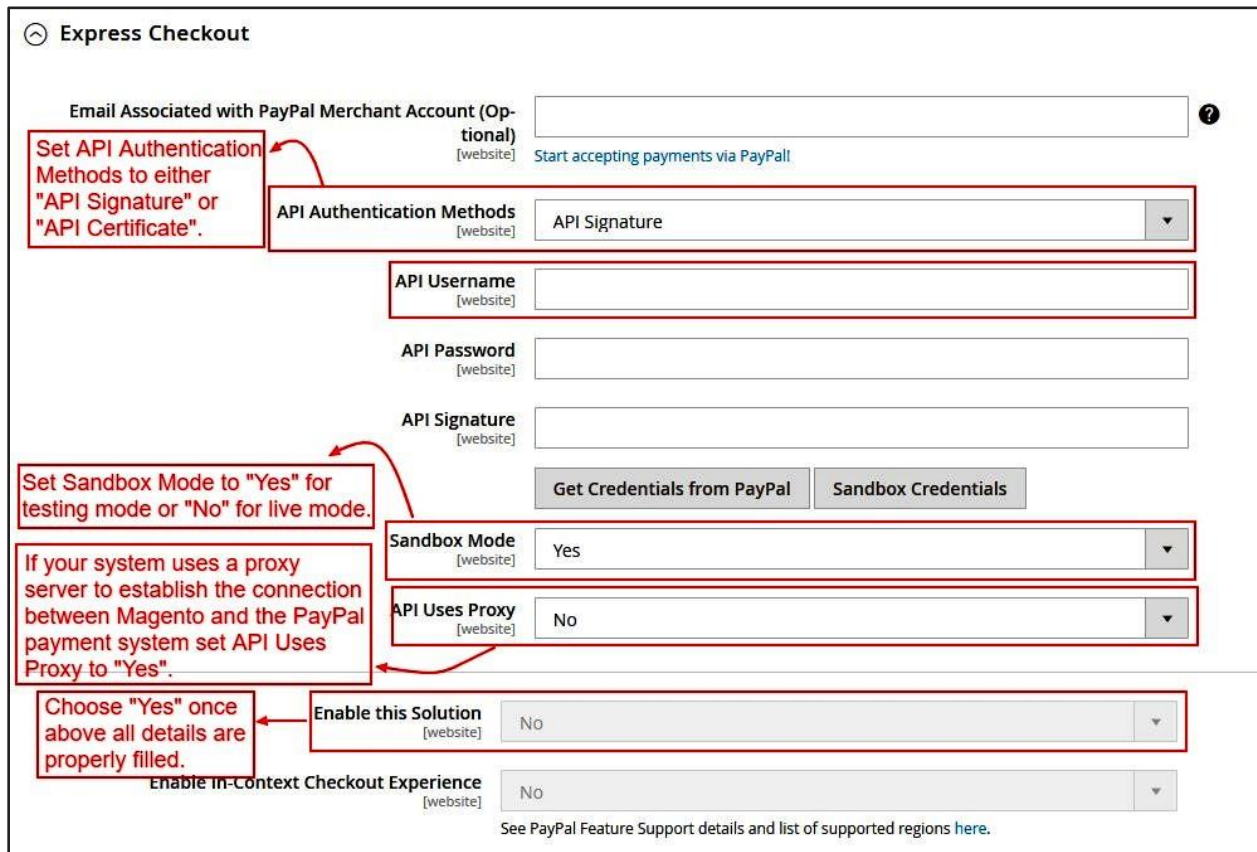
- Set **API Authentication Methods** to one of the following:
 - API Signature
 - API Certificate
- If necessary, click the **Get Credentials from PayPal** button. Then, complete the following:
 - API Username
 - API Password
 - API Signature

- If you are using credentials from your sandbox account, set **Sandbox Mode** to “Yes.”

If necessary, click the **Sandbox Credentials** button and follow the instructions to set up your testing environment.

- If your system uses a proxy server to establish the connection between Magento and the PayPal payment system, set **API Uses Proxy** to “Yes.” Then, complete the following:
 - Proxy Host
 - Proxy Port

When these sections are complete, set **Enable this Solution** to “Yes.”



The screenshot shows the 'Express Checkout' configuration page. Red boxes and arrows highlight specific settings and instructions:

- API Authentication Methods**: Set to 'API Signature'. A red box notes: 'Set API Authentication Methods to either "API Signature" or "API Certificate".'
- Sandbox Mode**: Set to 'Yes'. A red box notes: 'Set Sandbox Mode to "Yes" for testing mode or "No" for live mode.'
- API Uses Proxy**: Set to 'No'. A red box notes: 'If your system uses a proxy server to establish the connection between Magento and the PayPal payment system set API Uses Proxy to "Yes".'
- Enable this Solution**: Set to 'No'. A red box notes: 'Choose "Yes" once above all details are properly filled.'

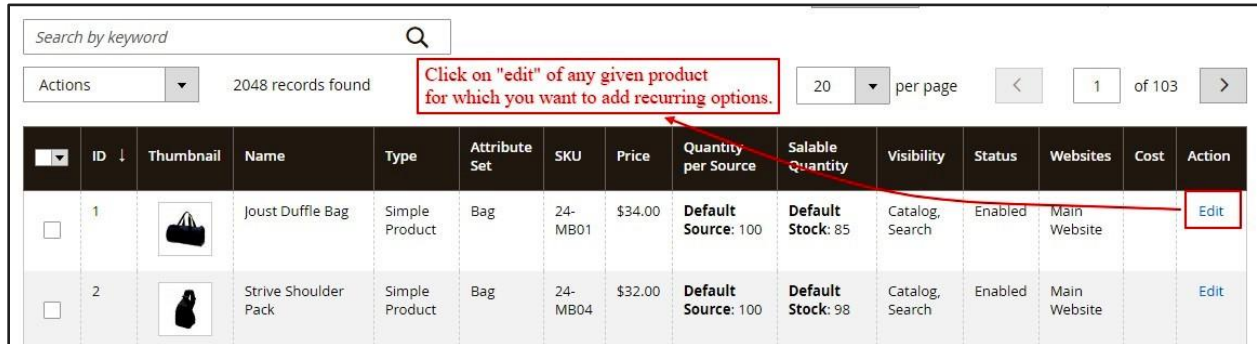
Other visible fields include: Email Associated with PayPal Merchant Account (Optional), API Username, API Password, API Signature, Get Credentials from PayPal, Sandbox Credentials, and Enable In-Context Checkout Experience.

Please go through below link for more details to enable this method.

https://docs.magento.com/m2/ce/user_guide/payment/paypal-express-checkout.html

2. HOW TO SET RECURRING OPTIONS FOR GIVEN PRODUCT



Go to [Magento 2 Admin] > Catalog > Products > Add/Edit Product > Expand PayPal Recurring Payment.



Search by keyword

Actions 2048 records found 20 per page 1 of 103

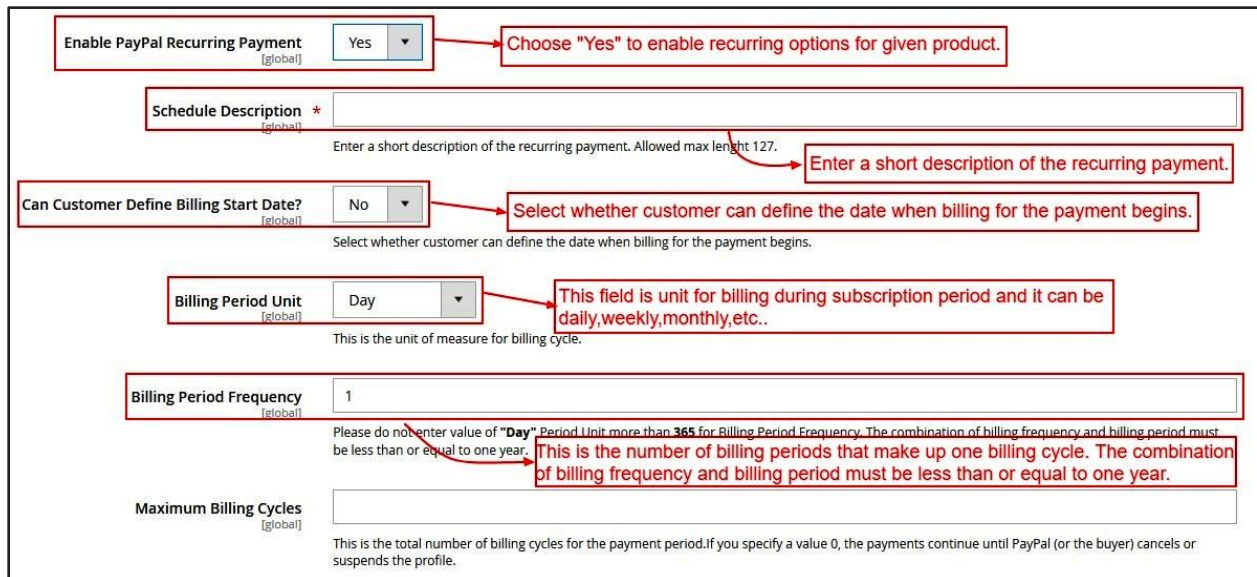
Click on "edit" of any given product for which you want to add recurring options.

	ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity per Source	Salable Quantity	Visibility	Status	Websites	Cost	Action
<input type="checkbox"/>	1		Joust Duffle Bag	Simple Product	Bag	24-MB01	\$34.00	Default Source: 100	Default Stock: 85	Catalog, Search	Enabled	Main Website		Edit
<input type="checkbox"/>	2		Strive Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	Default Source: 100	Default Stock: 98	Catalog, Search	Enabled	Main Website		Edit

Set recurring options for a given product as below:

- **Enable PayPal Recurring Payment:** Select “Yes” to enable recurring options for a given product.
- **Schedule Description:** Enter a short description of the recurring payment. Allowed max length 127.
- **Can Customer Define Billing Start Date?:** Select whether a customer can define the date when billing for the payment begins.
- **Billing Period Unit:** This is the unit of measure for the billing cycle.
- **Billing Period Frequency:** This is the number of billing periods that make up one billing cycle. The combination of billing frequency and billing period must be less than or equal to one year.
- **Maximum Billing Cycles:** This is the total number of billing cycles for the payment period. If you specify a value 0, the payments continue until PayPal (or the buyer) cancels or suspends the profile.
- **Is Trial Period Available?:** Choose “Yes” if trial period subscription is available for a given product.
- **Trial Period Unit:** This is the unit of measure for trial period.
- **Trial Period Frequency:** This is the number of periods that make up one cycle. The combination of trial period frequency and trial period unit must be less than or equal to one year.
- **Trial Period Amount:** This is the trial period amount.

- **Maximum Trial Cycles:** This is the total number of trial cycles for the payment period.
- **Initial Amount:** The initial, non-recurring payment amount when the recurring payments profile is created.
- **Allow Initial Amount Failure:** This sets whether to suspend the payment if the initial fee fails or, instead, add the failed payment amount to the outstanding balance due on this recurring payment profile.
- **Maximum Allowed Payment Failures:** This is the number of failed payments allowed before profile is automatically suspended.
- **Auto Bill on Next Cycle:** Use this to automatically bill the outstanding balance amount in the next billing cycle (if there were failed payments).



The screenshot shows the configuration form for a PayPal Recurring Payment. The form includes the following fields and annotations:

- Enable PayPal Recurring Payment** (global): A dropdown menu set to "Yes". Annotation: "Choose 'Yes' to enable recurring options for given product."
- Schedule Description *** (global): A text input field. Annotation: "Enter a short description of the recurring payment. Allowed max length 127." Below the field, it says "Enter a short description of the recurring payment."
- Can Customer Define Billing Start Date?** (global): A dropdown menu set to "No". Annotation: "Select whether customer can define the date when billing for the payment begins." Below the field, it says "Select whether customer can define the date when billing for the payment begins."
- Billing Period Unit** (global): A dropdown menu set to "Day". Annotation: "This field is unit for billing during subscription period and it can be daily, weekly, monthly, etc.." Below the field, it says "This is the unit of measure for billing cycle."
- Billing Period Frequency** (global): A text input field containing "1". Annotation: "Please do not enter value of 'Day' Period Unit more than 365 for Billing Period Frequency. The combination of billing frequency and billing period must be less than or equal to one year." Below the field, it says "This is the number of billing periods that make up one billing cycle. The combination of billing frequency and billing period must be less than or equal to one year."
- Maximum Billing Cycles** (global): A text input field. Annotation: "This is the total number of billing cycles for the payment period. If you specify a value 0, the payments continue until PayPal (or the buyer) cancels or suspends the profile."

Is Trial Period Available?
[global]

Yes ▾

Choose "Yes" if trial period subscription is available for given product.

Is trial period subscription available for this product?

Trial Period Unit
[global]

Day ▾

This is the unit of measure for trial period.

Trial Period Frequency
[global]

1

Please do not enter value of "Day" Period Unit more than 365 for trial Period Frequency. The combination of trial period frequency and trial period unit must be less than or equal to one year.

Trial Period Amount
[global]

\$

This is the trial period amount.

The initial, non-recurring payment amount when the recurring payments profile is created.

Maximum Trial Cycles
[global]

This is the total number of trial cycles for the payment period.

Initial Amount
[global]

\$

The initial, non-recurring payment amount is due immediately when the payment is created.

Allow Initial Amount Failure
[global]

No ▾

This sets whether to suspend the payment if the initial fee fails or, instead, add the failed payment amount to the outstanding balance due on this recurring payment profile.

This sets whether to suspend the payment if the initial fee fails or, instead, add the failed payment amount to the outstanding balance due on this recurring payment profile.

Maximum Allowed Payment Failures
[global]

0

This is the number of failed payments allowed before profile is automatically suspended.

Auto Bill on Next Cycle
[global]

No ▾

Use this to automatically bill the outstanding balance amount in the next billing cycle (if there were failed payments).

Use this to automatically bill the outstanding balance amount in the next billing cycle (if there were failed payments).

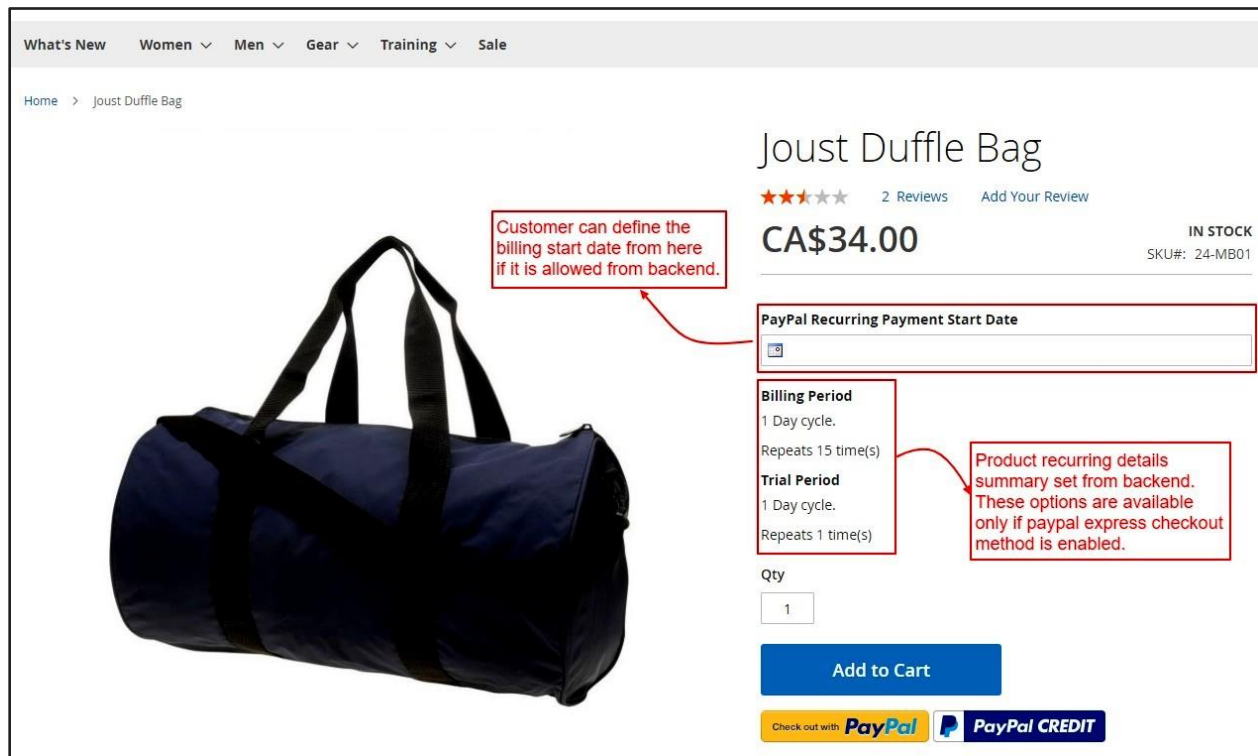
Click on "Save" button from top once fill up all details.

Note: Recurring options are not available for "Downloadable" type products.

3. STORE FRONT VIEW

Search for a product for which paypal recurring payment is enabled and go to detail page where you can see recurring details summary as below.

If **Can Customer Define Billing Start Date?** option is set as "Yes" from backend for a given product, then customer can select billing start date from here.



Choose the billing start date and click on “Add to cart” button.


You can also directly purchase this product by clicking on “Checkout with PayPal” button.

Note: Only one recurring payment product can be added to cart per transaction.

Home > Chaz Kangeroo Hoodie

Only one recurring payment product can be added to cart per transaction.

You can only have 1 recurring subscription plans in your shopping cart at a time.



Chaz Kangeroo

Be the first to review this product

CA\$52.00

Size S

XS S M L XL

Color Gray

Black Gray Orange

Billing Period

1 Day cycle.

Repeats until suspended or canceled.

Qty

1


Add to Cart



4. SHOPPING CART

You can also find recurring details on the cart page for a given product as below.

Shopping Cart

Product recurring details summary.

Item	Price	Qty	Subtotal
 <p>Joust Duffle Bag</p> <p>Recurring Start Date: Monday, 5th of August 2019</p> <p>Billing Period: 1 Day cycle. Repeats 15 time(s)</p> <p>Trial Period: 1 Day cycle. Repeats 1 time(s)</p>	CA\$34.00	1	CA\$34.00

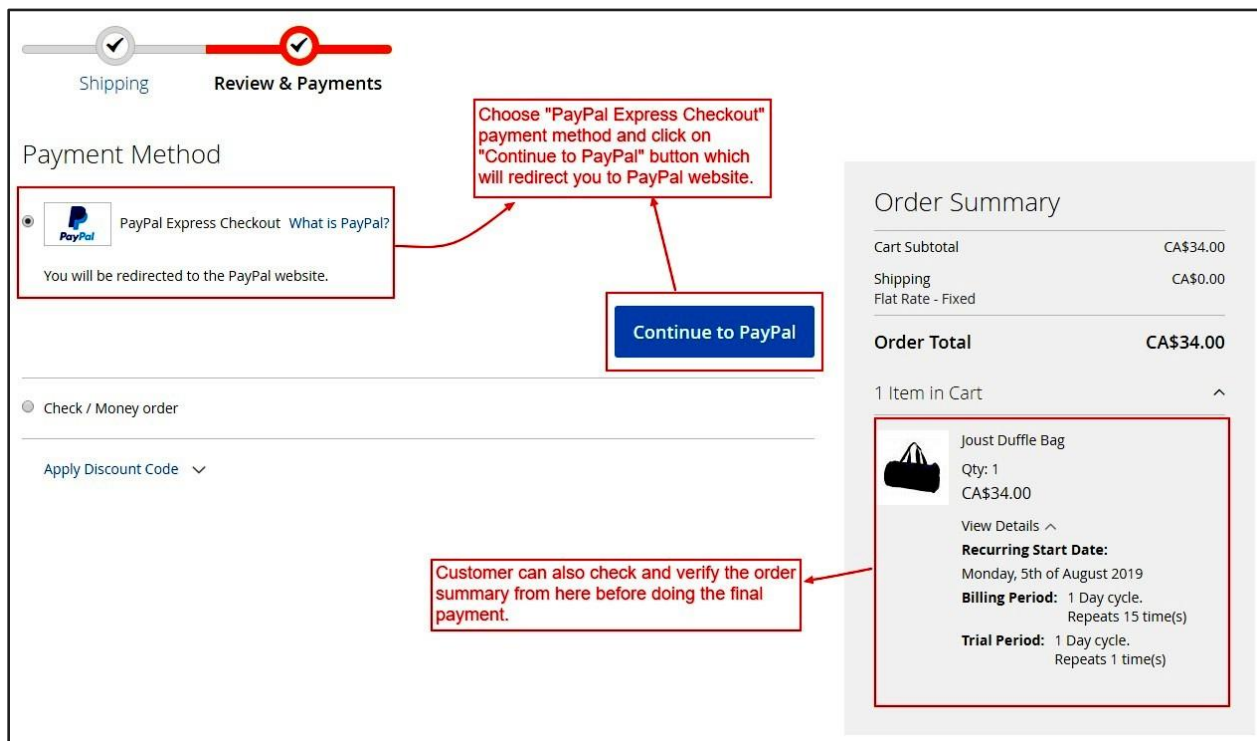
 

Click on “Proceed to checkout” button once you verify all cart details and ready to buy subscription.

5. CHECKOUT


Login (if you already have an account) or fill the checkout details, choose a shipping method and click “Next”.

Choose "Paypal Express Checkout" payment method and click on "Continue to Paypal" button which will redirect you to PayPal website.



Shipping ☒ Review & Payments ☒

Payment Method

☒  PayPal Express Checkout [What is PayPal?](#)
You will be redirected to the PayPal website.

☐ Check / Money order

[Apply Discount Code](#) ▾

Continue to PayPal


Choose "PayPal Express Checkout" payment method and click on "Continue to PayPal" button which will redirect you to PayPal website.

Customer can also check and verify the order summary from here before doing the final payment.

Order Summary

Cart Subtotal	CA\$34.00
Shipping	CA\$0.00
Flat Rate - Fixed	
Order Total	CA\$34.00

1 Item in Cart



Joust Duffle Bag
Qty: 1
CA\$34.00
[View Details](#) ^

Recurring Start Date:
Monday, 5th of August 2019

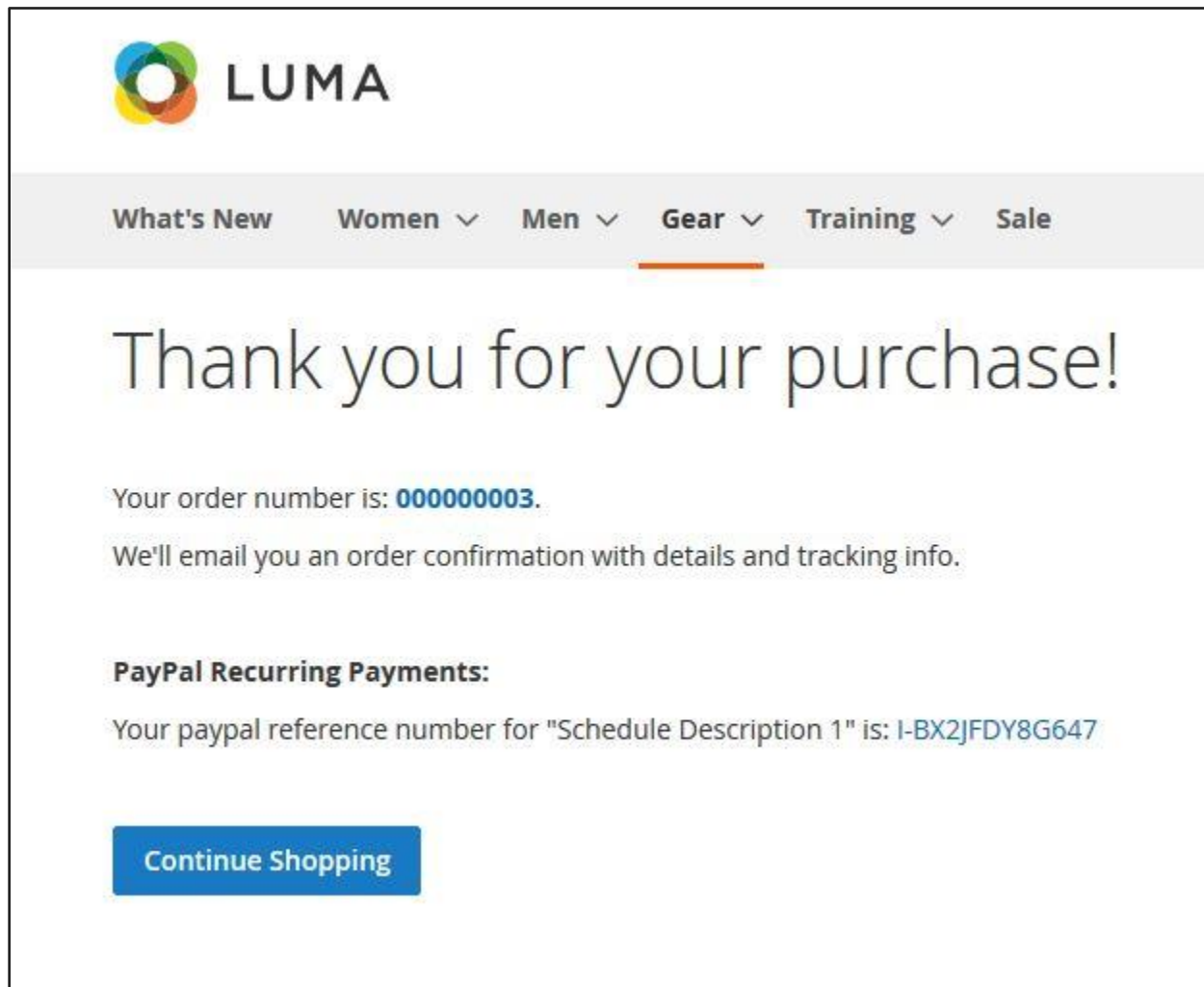
Billing Period: 1 Day cycle.
Repeats 15 time(s)

Trial Period: 1 Day cycle.
Repeats 1 time(s)

Follow the necessary steps on PayPal website and do payment.

6. SUCCESS

After successful payment, user will be redirected to a success page where he can find the PayPal reference number of the transaction.



7. CUSTOMER ACCOUNT – PAYPAL RECURRING PAYMENTS

Customer can find all paypal recurring payments details from his account itself by finding the link in left menu called “Paypal Recurring Payments”

My Account

My Orders

My Downloadable Products

My Wish List

Address Book

Account Information

Stored Payment Methods

Billing Agreements

My Product Reviews

Newsletter Subscriptions

PayPal Recurring Payments

PayPal Recurring Payments

Paypal Reference #	Status	Schedule Description	Recurring Start Date	Payment Method
I-BX2JFDY8G647	Pending	Schedule Description 1	8/6/19	paypal_express

1 Item

Show 10 per page

Customer can find all paypal recurring payments details from his account itself.

Click on Paypal Reference # to find the details of the given recurring payment.

You can find all details of subscription over there like paypal info, product info, scheduling info, billing info, shipping info, amount details, etc...

You can also manage the status of subscription from here. There will be four kinds of buttons at the top.

- **Get update:** Click here to get the latest status from Paypal.
- **Activate:** Click here to activate the given subscription if you find it activated from Paypal.
- **Suspend:** Click here to suspend the given subscription. Once suspended, you can reactivate it again by clicking on "Activate" button.
- **Cancel:** Click here to cancel the given subscription.

Paypal Reference # I-BX2JFDY8G647

Activate

Cancel

Get Update

Click here to get the latest status from PayPal.

Click here if you want to cancel the given subscription.

Click here to activate the given subscription if it is activated from PayPal.

Payment Information

Related Orders

Paypal Info

Payment Method:	paypal_express
Paypal Reference #:	I-BX2JFDY8G647
Schedule Description:	Schedule Description 1
Status:	Pending

Product Info

Product Name:	Joust Duffle Bag
SKU:	24-MB01
Quantity:	1

Details of a given PayPal recurring payment.

Payment Schedule

Recurring Start Date:	Tuesday, 6th of August 2019
Maximum Allowed Payment Failures:	3
Billing Period:	1 Day cycle. Repeats 15 time(s)
Trial Period:	1 Day cycle. Repeats 1 time(s)

Payments

Currency:	CAD
Initial Amount:	\$1.51
Trial Period Amount:	\$0.76
Billing Amount:	\$25.74

Billing Address

Shipping Address

You can find all recurring payment transactions for given subscription by clicking on "Related orders" tab.

Paypal Reference # I-PMDR6BHKMGTB

Payment Information

Related Orders

Customer can find all recurring payment transactions for a given subscription by clicking on the "Related orders" tab.

Orders Based on This Payment

Order #	Date	Customer Name	Order Total	Order Status
000000219	8/6/19		34	Processing
000000195	8/5/19		34	Processing

8. ADMIN – PAYPAL RECURRING PAYMENTS

Admin can find all paypal recurring payments details from Admin > Login > Sales > Paypal Recurring Payments

Admin can also use different filters E.g. To find recurring payment with given paypal reference # or find all active / canceled subscriptions etc...

Paypal Recurring Payments

36 records found

Admin can find all PayPal recurring payment details from here.

Admin can also use different filters E.g. To find recurring payment with given PayPal reference # or find all active/canceled subscriptions etc...

20 per page

1 of 2

Paypal Reference #	Store	Status	Created Date	Updated Date	Schedule Description
I-RBXT1EHMF4JJT	Main Website Main Website Store Default Store View	Pending	Aug 6, 2019, 12:16:55 PM	Aug 6, 2019, 12:16:55 PM	Schedule Description 1
I-SXSGP8FRJ4KW	Main Website Main Website Store Default Store View	Pending	Aug 6, 2019, 12:10:08 PM	Aug 6, 2019, 12:10:08 PM	Schedule Description 1

Click on any row to find the details of the given recurring payment.

Admin can find all details of subscription over there like paypal info, product info, scheduling info, billing info, shipping info, amount details, etc...

Paypal Info	Product Info	
Payment Method: paypal_express	Product Name: Joust Duffle Bag	
Paypal Reference #: I-R8X1EHMF4JJT	SKU: 24-MB01	
Schedule Description: Schedule Description 1	Quantity: 1	
Status: Pending	<div>Admin can find all details of given subscription from here like PayPal info, product info, scheduling info, billing info, shipping info, amount details etc...</div>	
Payments		
Currency: CAD		Initial Amount: CA\$2.00
Trial Period Amount: CA\$1.00		Billing Amount: CA\$34.00
<div>Payment Schedule</div>		
Recurring Start Date: Tuesday, 6th of August 2019		
Maximum Allowed Payment Failures: 3		
Billing Period: 1 Day cycle. Repeats 15 time(s)		
Trial Period: 1 Day cycle. Repeats 1 time(s)		
Billing Address	Shipping Address	

Admin can also manage the status of subscription from here. There will be four kinds of buttons at the top.

- **Get update:** Click here to get the latest status from Paypal.
- **Activate:** Click here to activate the given subscription if you find it activated from Paypal.
- **Suspend:** Click here to suspend the given subscription. Once suspended, you can reactivate it again by clicking on "Activate" button.
- **Cancel:** Click here to cancel the given subscription.

Admin can manage the status of subscription from here. E.g. cancel / suspend / active subscription.

←
Back
Cancel
Suspend
Get Update

Admin can find all recurring payment transactions for given subscription by clicking on "Related orders" tab.

PAYPAL RECURRING PAYMENT VIEW

Search

Reset Filter

13 records found

20

per page

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1 of 1

Payment Information

Related Orders

Order	Purchase Point	Purchased	Bill-to Name	Ship-To Name	Grand Total (Base)	Grand Total	Status	Action
000000014	Main Website Main Website Store Default Store View	Jul 24, 2019, 10:54:23 PM			\$25.74	\$25.74	Processing	View
000000020	Main Website Main Website Store Default Store View	Jul 25, 2019, 7:51:17 PM			\$25.74	\$25.74	Processing	View

Admin can find all recurring payment transactions for given subscription by clicking on "Related orders" tab.

9. ADMIN – PAYPAL RECURRING PAYMENTS BASED ON CUSTOMER

Admin can find all paypal recurring payments details for any given customer from
Admin > Login > Customers > All Customers > Edit > Paypal Recurring Payments

← Back

Delete Customer

Reset

Create Order

Reset Password

Force Sign-In

Save and Continue Edit

Save Customer

Search

Reset Filter

1 records found

20

per page

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1 of 1

Paypal Reference #	Store	Status	Created Date	Updated Date	Schedule Description
I-BX2JFDY8G647	Main Website Main Website Store Default Store View	Active	Aug 6, 2019, 10:44:03 AM	Aug 6, 2019, 11:03:56 AM	Schedule Description 1

Admin can find all PayPal recurring payments details for given customer from here.