Automatic channel renewals (Direct Renewal)

Overview

Automatic Channel Renewals (Direct Renewal) enables customers who have purchased products from your partners to renew their subscriptions directly through 2Checkout or via your website. Partners will be credited for the initial subscription renewal and subsequent renewals, receiving commissions based on the Direct Renewal margins you control.

Requirements

Direct Renewal has two prerequisites.

1. Your partners accept enrolment into the program.
2. Partner-sold subscriptions have end user information attached.

Availability

Channel Manager: You need to have the Channel Manager module activated. Contact 2Checkout directly if you would like to start taking advantage of the platform in your relationship with customers.

How does Direct Renewal work?

1. Shoppers purchase your products from a company you partnered with.
2. You enable Direct Renewal for partners and set Direct Renewal margins, specifying the margins you'll pay for the renewals made directly by end users on your website or via 2Checkout.
3. Partners accept the Direct Renewal program, add end-user information to subscriptions/licenses they sold, and configure a payment option used to pay their margins.
4. 2Checkout will send Manual Renewal notifications to shoppers ahead of the expiration deadline of their subscriptions/licenses (according to the settings you used to configure email notifications for renewals on e-commerce). When contacting end users directly based on the info attached, 2Checkout will prompt them to renew. If the renewal is successful, the partner will be credited based on the Direct Renewal margins. The email is sent in the shopper’s language if the partner has also specified the communication language when inserting end user data.
5. When end users click the renewal link provided via email, they are redirected to your shopping cart, prefilled with

https://knowledgecenter.2checkout.com/Documentation/35Reseller_management/20Automatic_Channel_Renewals_(Direct_...
their customer data and geo-localized according to their browser language.

- If customers leave the shopping cart ahead of placing the order, their subscriptions will not be renewed directly and partners will be able to renew them themselves.
- If customers place the renewal order but the payment fails or the order fails to reach the complete status, the subscription is transferred to eStore, just as if the item had been sold directly by you, and 2Checkout will start attempts to recover it per the unfinished payment settings in the leads management area of the Control Panel. Partners will no longer be able to renew these items themselves.

6. When customers place renewal orders, they also get the option of enabling auto-renewal going forward.

7. At the same time, end users have the option of contacting you directly via your website and renew.

8. After the renewal orders are placed, users receive all the notifications and support as if they would have purchased the product directly from you - including access to Customer portal - myAccount area for self-service (optional). Their subscriptions also behave the same as if they were acquired directly from you.

9. 2Checkout tracks the source of the subscription/license renewal, and if the initial orders have been referred to by your partners, will credit the sale to their account and pay the margins per the Direct Renewal margins you configured.

Subscriptions continue to be renewed automatically by 2Checkout each billing cycle, or manually by customers after the initial direct renewal. Partners can no longer renew such subscriptions themselves or edit end-user information. However, they will continue to receive margins for each purchase throughout the duration of their partnership with you.

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### How to enable Direct Renewal?

You can enable Direct Renewal in two ways:

1. Per partner
2. Per partnership program

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### Enable Direct Renewal for a partner

1. Go to **Partner management** -> **Partners**.
2. Edit or create the partner for which you'll enable the Direct Renewal program and click to edit its details.
3. Click on the **Commercial Settings** tab and scroll down to the **Other settings** area. Make sure that the **Create individual settings** option is selected under Partnership details.
4. Check the checkbox next to the **Enable Direct Renewal** option.
5. Scroll further down and in the **Partner margin** area, specify the **Direct Renewal** margins (the commission for renewals performed directly by 2Checkout or tracked via your website which were initially referred by partners).
   - You can set general margins, that will apply to all partner orders.
   - You also have the option of setting margins per product and groups of products.

When **Direct Renewal** is enabled it impacts all subscriptions referred by your partners. Leaving the Direct Renewal margins field empty or not defining margins for specific products or groups of products will result in zero partner margins for subscription renewed by customers directly via 2Checkout or through your website.
Click **Save changes** to make sure that the Direct Renewal is activated for this partner.

**Note:** Direct Renewal is an opt-in program, which means that once activated by you, partners need to accept enrolment.

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### Enable Direct Renewal for a partnership program

1. Go to **Partner management** -> **Partnership programs**.
2. Identify or create the partnership program for which you'll enable the Direct Renewal program and click to edit its details.
3. Click the **Commercial Settings** tab and scroll down to the **Other settings** area.
4. Check the checkbox next to the **Enable Direct Renewal** option.
5. Scroll further down and in the **Partner margin** area, specify the **Direct Renewal** margins (the commission for renewals performed directly by 2Checkout or tracked via your website which were initially referred by partners).
   - You can set general margins, that will apply to all partner orders.
   - You also have the option of setting margins per product and groups of products.

When **Direct Renewal** is enabled it impacts all subscriptions referred by your partners. Leaving the Direct Renewal margins field empty or not defining margins for specific products or groups of products will result in zero partner margins for subscription renewed by customers directly via 2Checkout or through your website.

Click **Save changes** to make sure that the Direct Renewal is activated for this partner.

**Note:** Direct Renewal is an opt-in program, which means that once activated by you, partners need to accept enrolment.

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### Partners are automatically notified via email when Direct Renewal is enabled for their accounts

The 2Checkout system is designed to provide automatic notifications to partners when you enable Direct Renewal for their accounts. Emails are sent:

- To specific partners when Direct Renewal is activated for their standalone accounts.
- To partners part of a partnership program when Direct Renewal is enabled for the entire program.
- To partners part of a partnership program when you swap their current program with Direct Renewal disabled for a new one with Direct Renewal enabled.

Email notifications are sent in bulk at specific intervals.

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### Disable Direct Renewal

To disable Direct Renewal for a partner or a partnership program, follow steps 1 through 3 mentioned above in each case, and uncheck the checkbox next to the **Enable Direct Renewal** option. Click **Save changes** for the modification to be applied.
F.A.Q.

1. **What happens when the direct renewal program is disabled?**
   - End users that haven't done so already, will no longer be able to renew their subscriptions directly via your website or through 2Checkout, but only through the partner which referred the initial purchase. 2Checkout will continue to control the renewal process for all subscriptions already renewed directly and partners will no longer receive margins for future transactions.

2. **Where can I see subscriptions renewed directly by end users as a result of the Direct Renewal program?**
   - In the **Subscriptions** area of the Control Panel.

3. **Where can I see orders for subscriptions renewed directly by end users?**
   - Go to **Orders and customers -&gt; Order search** and make sure the eStore tab is selected.

4. **What are the possible Direct Renewal statuses?**
   - **Pending:** Waiting for partner enrollment.
   - **Active:** Partner for which Direct Renewal was enabled.
   - **Inactive:** Partners for which Direct Renewal is not enabled.
   - **Denied:** Partners that rejected enrollment.