

Loyalty subscriptions

“ **You need:** *Subscriptions manager* — *view* to browse, ... — *edit* to change.
Importing needs *Loyalty subscriptions* — *import*, separate again.

A subscription gives a customer an ongoing benefit for a period, rather than a single-use code or amount.

This is the smallest area in Marketing: browse, create, update, expire. There are no bulk operations here — changes are per subscription, or via an import.

Finding a subscription

Search either way round:

- **By customer** — everything that customer has.
- **Most recent** — browse the latest subscriptions across the brand, for a general view of what has been issued.

Searching by customer is the usual path when someone gets in touch.

Creating one

Create the subscription against the customer with its period. For many customers at once, import a phone list instead — see [Importing from a CSV](#).

Updating

An existing subscription can be updated — typically its dates. Use this to extend a subscription, or to correct one entered wrongly.

Expiring

Expiring sets the subscription to end **today**. It stops the benefit from now on without removing the record of it having existed.

There is no delete here, and that is the right design: a subscription a customer has held is part of their history. Expiring is the complete answer for "this should stop".

“ Because expiry lands on today rather than a date you choose, it takes effect immediately. If the customer should keep the benefit until the end of a paid period, **update the end date** instead of expiring.

Common situations

Situation	What to do
Customer says their subscription ended early	Check the end date; update it if it was entered wrongly
Customer wants to cancel	Expire it, or set the end date to the end of their paid period
Subscription created against the wrong customer	Expire it and create the right one. There is no delete
Bulk-issuing subscriptions	Import a phone list — Importing from a CSV

Choosing between a subscription and the alternatives

	Subscription	Personal promotion	Wallet credit
Shape	Ongoing benefit for a period	A specific offer, granted once	A spendable balance
Ends by	Date	Use, or date	Being spent, or date

If the benefit is "free delivery for three months", that is a subscription. If it is "20% off their next order", that is a personal promotion — see [Personal promotions](#).

Related pages

- [Importing from a CSV](#) — issuing subscriptions in bulk
- [Personal promotions](#) — single-use granted offers
- [Wallets: managing records](#) — balance-shaped benefits

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