

MAINSTAY · USER MANUAL

Mainstay User Manual

A Shopify-native subscription engine with a retention layer built in.

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Welcome to Mainstay

Mainstay runs recurring subscriptions on your store and then does the harder job: keeping the subscribers you win. It has two layers:

- **The engine.** Sell subscribe and save on your products, bill on Shopify's own subscription contracts and Shopify Payments, and give customers a portal to skip, pause, resume, and cancel.
- **The retention layer.** Recover failed payments with decline-aware dunning, intercept cancellations with save offers, and see your subscription health, recovered revenue, and what needs your attention in one dashboard.

It is built on native Shopify surfaces. Subscriptions are Shopify subscription contracts billed through Shopify Payments, and the customer portal is served through Shopify's app proxy. Mainstay never injects a script into your theme, never vaults card numbers, and never acts as a payment processor. Shopify does the billing; Mainstay orchestrates it and works to keep the subscriber.

This manual covers setup, every part of the admin, the customer portal, and troubleshooting. If you just want a quick answer, see the FAQ and support page.

Before you start

You need:

- A Shopify store with the Mainstay app installed and Shopify Payments available for subscriptions.
- The products you want to sell on subscription.

You do **not** need a developer or theme code changes. Because subscriptions run on Shopify's native contracts and checkout, there is nothing added to your theme to break or clean up.

How Mainstay works

- **Subscriptions are native contracts.** When a customer subscribes at checkout, Shopify creates a subscription contract that your store owns. Mainstay orchestrates it.
- **The scheduler bills each cycle exactly once.** Mainstay charges each contract on its billing date. Before it charges, it journals the billing cycle with a deterministic key, so a hiccup or a retry on our side can never bill the same cycle twice.
- **Webhook workers react to each outcome.** Mainstay reacts to the success or failure of each charge, folds it through the retention core under your settings, records the result, and carries out the decision.

Setting up a subscribe and save plan

Open **Setup** from the Mainstay admin. The page has three parts.

1. Find a product

Type part of a product's title into **Search products by title** and press **Search**. Pick a result with **Select**. The selected product is the one your subscribe and save plan will attach to.

2. Create the subscribe and save plan

With a product selected, set:

- **Billing and delivery interval.** Week or Month.
- **Interval count.** How many intervals between charges, from 1 to 52. For example, a count of 2 with a Month interval bills and delivers every two months.

- **Percent off.** The subscribe and save discount, from 1 to 90 percent.

Press **Create subscribe and save plan**. Mainstay creates a Shopify selling plan group on the product with a generated plan name such as “Deliver every 2 months, save 15%”. The subscribe option then appears on that product at your normal checkout.

Existing subscription plans

Below the wizard, **Existing subscription plans** lists the selling plan groups Mainstay manages and the plans inside each one, so you can see what is already attached.

Managing subscribers

Open **Subscribers** to see your subscription contracts.

The subscribers list

Each row shows the contract, the customer, the **Shopify status**, the **Mainstay state** (active, dunning, paused, or cancelled), the next billing date, and the number of consecutive failed attempts. A contract shows “not tracked” for its Mainstay state until Mainstay has seen a billing event for it. Use **Previous** and **Next** to page through a large list.

A subscriber’s detail page

Select a contract to open its detail page, which brings the Shopify record and Mainstay’s own book together:

- **Contract.** Customer, Shopify status, billing cadence, and next billing date.
- **Actions.** **Skip next cycle** skips the upcoming delivery so the customer is not charged for it. **Pause subscription** stops billing until you resume it. Both ask you to confirm first.
- **Mainstay book.** The app state, consecutive failed payments, the next retry date, the last decline code, and the last decision Mainstay made.
- **Billing attempts (Shopify).** Each charge attempt with its outcome and, on a failure, its error code.
- **Billing cycles (Mainstay journal).** The per-cycle journal, including whether a cycle was a dunning retry.
- **Save offers.** Any save offers presented on this contract, with the reason, the offer, the discount, and whether it was accepted or declined.

Smart dunning (failed-payment recovery)

A failed charge is not always a lost customer. Mainstay reads the decline code and takes the right action instead of blindly retrying.

- **Soft declines retry on your schedule.** A temporary failure is retried on the days you set.
- **Hard declines ask for a new card.** A dead or invalid card sends the customer a secure link to update their payment method, rather than wasting retries on a card that will keep failing.
- **Authentication challenges are handled the same way.** A charge that needs the customer to re-authenticate prompts them to update their method, which re-authenticates it.
- **Your problems come to you.** A configuration or out-of-stock failure is surfaced to you on the dashboard and never chases the customer for a payment that was not theirs to fix. An out-of-stock cycle never terminates a subscription on its own.
- **Every charge fires once.** The exactly-once scheduler means a retry can never double-bill a subscriber.

Configuring the dunning plan

In **Settings**, under **Dunning plan**:

- **The retry schedule.** Each entry is the number of days after a failed charge to retry it, from 0 to 90. Mainstay runs one retry per entry, so the number of retries equals the length of the schedule. Use **Add retry** and **Remove** to shape the plan, up to ten retries.
- **When retries run out.** Choose **Pause the subscription** or **Cancel the subscription**. Mainstay applies this after the last retry.

The **Effective configuration** panel shows the resolved values Mainstay is using now, including the total number of retries.

Cancellation save offers

When a customer opens the cancel flow in their portal, Mainstay does not cancel right away. It asks why they are leaving, then offers the best alternative you allow for that reason before the subscription is lost.

- **The reason picker.** The customer chooses from a short list of reasons, such as that it is too expensive, they have too much product, they are taking a break, the quality was not what they expected, they found an alternative, or another reason.
- **The right offer for the reason.** Mainstay selects a pause, a skip, a product swap, or a discount, matched to the reason and to what you have enabled.
- **Honest outcomes.** A discount is applied to the live contract. A swap is confirmed by email so the store can arrange it. If there is nothing suitable to offer, or the customer declines, Mainstay cancels the subscription cleanly. It never claims to have applied something it did not.

Every offer shown, accepted, or declined is recorded, which is what feeds the dashboard's save-offer performance and the anti-farming guardrails below.

Configuring save offers

In **Settings**, under **Save-offer policy**:

- **The offer switches.** Turn **Offer to pause**, **Offer to skip a cycle**, **Offer to swap the product**, and **Offer a discount** on or off independently. Mainstay only ever presents an offer you have enabled.
- **Discount percent.** The size of a save discount, from 1 to 90 percent.
- **Discount lifetime cap per subscriber.** How many save discounts one subscriber can ever be granted. This stops the cancel flow from being farmed for repeat discounts.
- **Minimum tenure for a discount.** A discount is not offered to a subscriber below this many completed billing cycles, so a brand-new subscriber cannot harvest one.

The customer portal

Mainstay serves a customer portal through Shopify's app proxy at `/apps/mainstay`. Link to it from your customer account area or storefront so subscribers can manage their own subscriptions.

- **Sign-in required.** The portal identifies a shopper through Shopify's signed request. A visitor who is not signed in sees a prompt to log in. Guests cannot manage a subscription.
- **What customers can do.** View their subscriptions, skip the next delivery, pause, resume, and start the cancel flow (which runs the save-offer interception above).
- **Built to be safe.** Every request is verified, and before any change Mainstay re-confirms that the subscription belongs to the signed-in customer. It never trusts a subscription or customer identifier sent by the browser.

The retention dashboard

The Mainstay home page is your retention dashboard:

- **Subscription health.** Counts of active, at risk, paused, and cancelled subscriptions. “At risk” means the subscriber is in dunning after a failed charge.
- **Recovery.** How many charges first failed and then succeeded on a dunning retry, and how many cycles are parked failed, waiting on the customer, on you, or on a later retry.
- **Save-offer performance (last 30 days).** Offers presented, offers accepted, and the acceptance rate.
- **Needs attention.** Contracts that will not advance on their own. A customer row is waiting on a card update or authentication; a merchant row hit a configuration or inventory problem.

Troubleshooting

A few common situations:

- **A subscriber shows “not tracked”.** Mainstay starts tracking a contract’s state once it has seen a billing event for it. The subscribers list still shows the Shopify status in the meantime.
- **A failed charge is not retrying.** Check that your dunning plan has retries. A hard decline or an authentication challenge is waiting on the customer to update their card, not on a retry, and a configuration or inventory failure is waiting on you. The Needs attention list shows who is waiting on what.
- **A save discount says the store will apply it shortly.** The customer’s acceptance is recorded, and the discount will be applied to their upcoming orders. Mainstay shows honest copy rather than claiming an application that has not completed yet.
- **The portal shows a sign-in prompt.** The shopper must be logged in to manage a subscription.

For more, see the FAQ and support page.

Getting help

If something is not working or you have a question this manual did not answer, contact support and include your store URL and a short description of what you expected. We are glad to help.