How to edit or change price plans

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At times you may need to edit or update a Price Plan. This include updating the price plan's description, price, onboarding campaigns, renewal reminders, and more.

Editing a price plan

1. Navigate to the Membership Type page and click on the membership type's name you would like to adjust. Alternatively, you can click the down arrow on the same line as the membership type and select the **View** option.

2. Next, click on the **Plans** tab**.** You can edit or delete a price plan type by clicking on the **down arrow** on the same line as the plan. To edit a price plan, click **Edit**.

3. On the edit page, there will be several tabs which can be used to adjust different aspects of the selected price plan.

    - **Details**
    - **Plan Settings**
    - **Join Settings** or **Approve Settings**
    - **Renewal Settings**

Details

The Details tab will outline and allow you to adjust basic information regarding the price plan. Click on the **Edit** button in the specific section to edit the section.

- **Plan Details**
    - **Name** - The name that will be used to identify the plan.
    - **Code** - The code used to identify the plan.
- **Visibility Settings**
    - **Availability** - This is used to limit the availability of this plan on forms.
        - **Inactive** - The plan is disabled and is not visible on any form.
        - **New** - The plan is only available to new members.

        - **Renewal** - The plan is only available to renewing member.
        - **New and Renewal** - The plan is available to both new and renewing members.
    - **Visibility on Forms** - Determines which forms the plan is displayed and available on.
        - **Website** - The plan will only be displayed on forms available on the public website.
        - **Member Area** - The plan will only be displayed on forms available in the member area.
        - **Website and Member Area** - The plan will be displayed on both the website and the member area.

- **Description**
    - **Public Description** - The description of the price plan which will appear on the join and renewal forms.
    - **Admin Notes** - Notes for the price plan. These are private and are used for internal purposes only.

Plan Settings

The Plan Settings tab contains options which determine the plan's pricing details. Click on the **Edit** button in the specific section to edit the section.

- **Membership Settings**
    - **Anniversary Date** - Option to select a fixed or flexible membership anniversary date.
        - **Flexible** - Membership starts and ends individually. There is no set date for the member's renewals.
        - **Fixed** - All of the members' membership starts and ends on a fixed date.
            - **Set Anniversary Dates by** - Allows you to set the fixed membership term anniversary on a yearly (Day of the year), or monthly (Day of the month) basis.
    - **Start New Membership** - When a new member's membership will begin.
    - **Term Length** - The length of the membership. The term length is the span of time between the start and end date of the membership.
    - **Transition Period** - How many days before the member's expiration date that they will be able to renew.
    - **Grace Period** - How many days members can continue to access member only content and login, after their membership expires.

  Note

  The sum of the transition period and grace period cannot exceed the price plan's term.

- **Roles Assigned** - The access role(s) assigned to the member when they have this price plan.

- **Fees and Payment Options**
  - **Membership Fees** - The fees for the price plan.
    - **Price per Membership Term** - The recurring cost per term.
    - **Initial/Reinstatement Fee** - A one time join fee for new or reinstated members.
    - **Payment Account** - The payment account that will be used to process transactions for the plan.
    - **GL Account** - The GL Account that will be used to store transaction information for the plan.
  - **Payment Options** - Which payment options are available.
    - **Payment Required** - Option to force if a credit card payment is required to create or renew the membership.
      - **Enable online payment** - Allows online credit card payments to be accepted for new and renewing memberships.
      - **Enable offline payment** - Allows offline payments (e.g., Cash, Check, Wire Transfer, etc.) to be accepted for new and renewing memberships.
        - **Offline Payment Instructions** - The instructions displayed to users who selected to pay offline.
    - **Payment Bypass Roles** - Users with the selected roles will bypass the payment form when completing the member application or renewal form on behalf of someone else.

- **Membership Self-Serve Settings**
  - **Self-Serve Actions** - Self-Serve actions allow users to make changes to their membership on their own, without the assistance of staff or an officer.
    - **Renew** - Allows members to renew their membership through their profile.
    - **Cancel** - Allows members to cancel their membership through their profile. Once the individuals' membership term is over, their membership will not be renewed.
    - **Reactivate (Undo Cancellation)** - Allows members who have previously cancelled their membership to reactivate (uncancel) their membership.
    - **Terminate** - Allows members to immediately terminate their membership.
  - **Notifications** - Determines whether notifications are sent to a member or staff when a self-serve action has been performed.
    - **Cancellation Notifications** - Sends a notification when a member cancels their membership.

        - **Reactivation Notifications** - Sends a notification when a member reactivates (uncancels) their membership.

        - **Termination Notifications** - Sends a notification when a member terminates their membership.

Join Settings or Approval Settings

The Join or Approval Settings tab allows you to adjust various options for when a new member joins under the selected price plan. Click on the **Edit Join Settings** or **Edit Join Settings** button to adjust the price plan's join settings.

- **Plan Settings**
    - **Approval Settings** - Determines whether new applications will need to be manually reviewed and approved by staff.
        - **Approval Bypass Roles** - Users with the selected role(s) will bypass the approval process when completing the member application form on someone's behalf. This option only shows if Require Approval is enabled.
- **Payment Options**
    - **Payment Required** - Option to force if a credit card payment is required to create or renew the membership.
        - **Online Payment** - Allows online credit card payments to be accepted for new and renewing memberships.
            - **Capture Payment** - Captures the full payment amount at the time of an individual's application. Refunds can be made by administrators in the event the applications are declined. This option only shows if Require Approval is enabled.
            - **Pre-Authorize payment** - Holds the applicant's payment for three days or until approved. After three days, the payment hold will expire and the applicant will have to pay again. This option only shows if Require Approval is enabled.
        - **Offline Payment** - Allows offline payments (e.g., Cash, Check, Wire Transfer, etc.) to be accepted for new and renewing memberships.
            - **Offline Payment Instructions** - Allows you to provide instructions on how applicants can submit their offline payment.
    - **Payment Bypass Roles** - Members with the selected roles will bypass the payment form when completing the member application or renewal form on behalf of someone else.
- **Join Settings** or **Approval Settings**
    - **Upon Membership Join** - Actions that are automatically performed when a new member joins the organization under the price plan.
        - **Add to groups** - Automatically adds the new member to the selected groups.

        - **Opt-in to selected email channels** - Automatically opts the member into the selected email channels.
        - **Add note** - Automatically adds a note to the new member's profile.
    - **Upon Membership Decline** - Actions that are automatically performed when an application has been declined. This option only shows if Require Approval is enabled.
        - **Full refund** - Provides the applicant with a full refund.
        - **Partial refund - Charge cancellation fee** - Provides the user with a partial refund based on the entered cancellation fee.
        - **No refund** - No refund is provided to the applicant when declined.

- **Application Form**
    - **Confirmation for Submitted Applications** - Displays a confirmation to users who submit an application.
        - **Use default message** - The default MemberNova application message will be displayed. Click **View default message** to preview the message.
        - **Use custom message** - Allows you to display a custom message on the confirmation page.

- **Join Notifications** - Allows you to select and customize the notifications that are sent out to new applicants or staff members.
- **Onboarding Campaign** - Allows you to create an automated drip campaign to send out emails to new members.

Renewal Settings

The Renewal Settings tab allows you to adjust various options relating to when a member renews their membership. Click on the **Edit Renewal Settings** button to edit these settings.

- **Renewal Settings**
    - **Renewal Type** - This decides how members who are subscribed to this price plan are able to renew.
        - **Manual only** - Members can only renew their membership via the renewal form.
        - **Auto-Renew only** - Members are required to enter and save their credit card details to renew their membership with auto-recurring charges.
        - **Manual and Auto-Renew** - Members will be able to choose whether they would like to manually renew or auto-renew when they select their membership.
            - **Preselect Auto-Renew** - If selected, Auto-Renew will be checked by default, but the members may uncheck it if they prefer.

- **Renewal Period Settings**
    - **Transition Period** - For new applications, this determines how many days before the membership start date that members can join. For renewals, this determines how many days before the membership expiration date that members can renew.
    - **Grace Period -** Determines how many days after a membership expiry date that a member can continue to access the member area and renew their membership.
    - **Auto-Renew Schedule** - Displays a diagram that shows the auto-renew schedule.
- **Join/Leave Plan Settings**
    - **Upon Renewing into Plan** - Performs the selected actions when a member is renewed with this price plan.
        - **Add to groups** - Members with this price plan will be automatically added to the selected groups.
        - **Opt-in to selected email channels** - Members with this price plan will be automatically added to the selected email channels.
        - **Add entity note** - Automatically adds a note to members with this price plan.
    - **Upon Leaving Plan** - Performs the selected actions when a member leaves this price plan.
        - **Remove from groups** - Removes members that are leaving this price plan from the selected groups.
        - **Opt-out from selected email channels** - Automatically opts-out members leaving this price plan from the selected email channels.
- **Renewal Form**
    - **Message to Indicate Ability to Renew (Advanced)** - This message appears on the membership renewal form when the person is unable to renew, because they are not within the renewal period.

      Success Message for Submitted Renewals - This message appears when the membership renewal was successfully submitted for those with this plan plan.
- **Renewal Notifications** - Allows you to select and customize notifications that are sent to members or staff when a member renews.

Renewal Reminders

Back on the **Renewal Settings** tab, you will see Renewal Reminders near the bottom.

- **Renewal Reminders** - Create automated reminder for manual and auto-renew renewal types that emails members who should renew soon.

Renewal Welcome Campaign

Back on the **Renewal Settings** tab, you will see Renewal Welcome Campaign near the bottom.

- **Renewal Welcome Campaign** - Create an automated drip campaign that is sent to members who recently renewed.

Related Content

- How to setup a renewal welcome campaign
- How to setup an onboarding campaign email
- How to setup renewal reminders
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