

How to setup Price Plans

David H. - 2021-11-11 - Membership

Price Plans set the cost for the Membership Type. Price Plans can be configured for any membership term such as monthly or annual. You can set extra options for the price plans.

Adding a Price Plan

1. Navigate to the [Membership Type](#) page. On this page, click on the **Plans & Options** tab.

2. To add a price plan, click the **Add Price Plan** button.

3. Several fields will be displayed which are needed to create a price plan:

- **Name** - The name of the price plan.
- **Code** - The code of the price plan. This can be used later for importing members.
- **Logo** - The image of the price plan which will appear on the join and renewal forms.
- **Description** - The description of the price plan which will appear on the join and renewal forms.
- **Recurring Fee** - The recurring membership fee based on the membership term.
- **Availability** - This setting determines who can select price plans and where they will appear:
 - **Inactive** - This will disable the price plan, so it cannot be selected.
 - **New** - This setting will have the price plan only appear on the Join form, so only members joining the organization can select it.
 - **Renewal** - This setting will have the price plan only appear on the Renewal form, so only members renewing their membership can select it.
 - **New and Renewal** - This setting will have the price plan appear on both Join and Renewal forms allowing any member or new member to select it.
- **Renewability** - Determines how the price plan can be renewed.
 - **Manual** - Has to be renewed manually by a member, who has to submit the Renewal form.
- **Recurrence Interval** - The type of recurrence for membership
 - **Month(s)**
 - **Year(s)**
- **Number of Recurrences** - The term the membership is for before it needs to be renewed.
- **Anniversary Date** - This allows you to select a fixed membership anniversary date or if it can be flexible.
 - **Flexible** - The member's membership starts and ends individually. There is no

set date for all of the members' renewals.

- **Fixed** - All of the members' membership starts and ends on a fixed date.

- **Transition Period** - This determines how many days before the member's expiration date that they will be able to renew.
- **Grace Period** - This determines how many days members can still 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** - Gives the selected role to the member based on the price plan.

Note: If this field is blank, the member will be assigned the default member role

4. Click "**Save**" once done.

Related Content

- [View, edit, and delete Membership Types](#)