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# How to setup price plans

David H. - 2023-04-05 - Membership

Price Plans sets the cost of the membership, how long the membership is for, if membership needs approval, renewal reminders, and more.

## Adding a Price Plan

- 1. Navigate to the Membership Type page. On this page, click on the **Plans** tab.
- 2. To add a price plan, click the **Add 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.
  - 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.
  - **Image** The image of the price plan which will appear on the join and renewal forms.
  - 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.

- 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.
- **Price per Membership Term** The recurring cost per term.
- **Initial Fee** A one time join fee for new or reinstated members.
- Payment Required Option to force if a credit card payment is required to create or renew the membership.

#### Note

Offline payments are not available when the Payment Required option has been enabled.

- Payment Options Which payment options are available.
  - 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.
- 1. Click Add Plan once done.

You then can review and change the price plan's settings if needed.

### Related Content

- How to edit or change price plans
- How to view, edit, and delete membership types