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