

Membership & subscriptions user guide

Handling the process of membership and renewals is a key component of every association, and there is a lot to it. You need to be able to define your grades of membership, set prices, set durations and payment plans. Day to day you need to be able to sign-up new members, switch members to different grades, cancel memberships, ensure payments are made. You also need to ensure that members can easily renew their membership.

Being a member rewards you with certain privileges, so you can then use rules to grant your members access to certain areas of your website or resources, discounts or early bird access to event tickets, special member prices for shop products or online courses.

The membership & subscriptions feature in CRM allows you to define a product or service which is purchased on a recurring basis. This will typically be in the form of membership fees, but could equally be used for things like magazine subscriptions.

With this feature you can define categories for your products, set different prices and durations and how to manage renewal of subscriptions. This configuration is wrapped in an intuitive user interface that allows users to purchase and manage their subscriptions and maximise uptake and renewal, and administrators to concentrate less on the day to day management of it.

This guide will cover

- How to setup your subscriptions in the admin
- Configuration on how subscriptions are presented to end users to purchase
- Manually creating subscriptions
- Day-to-day management of your subscriptions
- The renewal cycle
- Common issues

At a glance functionality

Subscription features

- Unlimited classes and grades for your products
- Unlimited payment plans for each product
- Single & instalment payment plans
- Fixed cost and manually priced subscription plans
- Rolling and fixed renewal date subscriptions
- Automated pro-rata price calculations for fixed date subscriptions
- Visual nudging for particular grades or pricing options
- Automated renewals for recurring payment methods
- Reminder & failed payment emails

- Multiple payment methods including full integration with GoCardless & Stripe
- Mid-year subscription cancellation, pausing and grade changes

Subscriptions overview

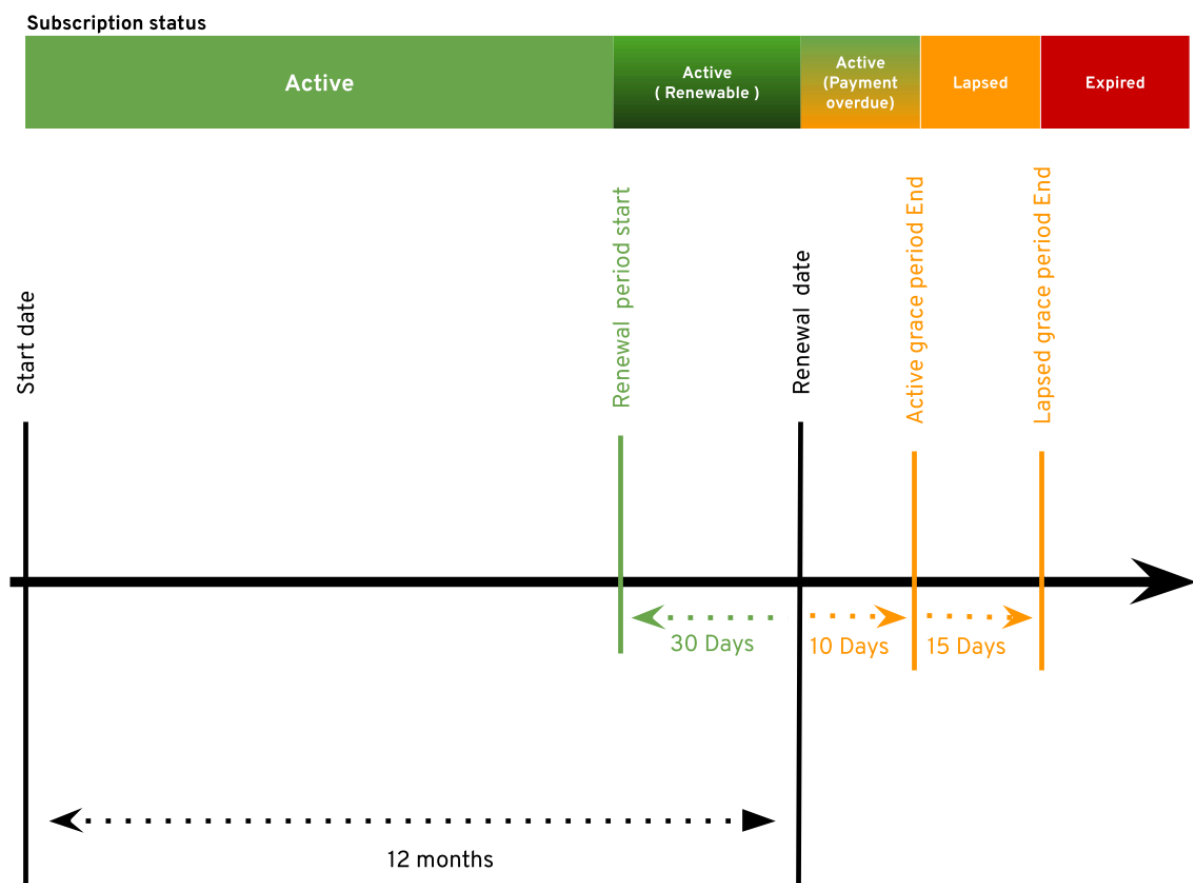
Subscriptions can be an extremely complex task, not only creating the structure and prices, but handling renewals and managing changes that a member wants to make.

This guide will take you step-by-step through the process, but in order to illustrate how a subscription status changes, and how you can affect this, we'll work through a small example.

A subscription timeline

This example demonstrates a 12 month subscription, payable with a single payment, with the following settings

- Renewal period (days) - 30
- Active grace period (days) - 10
- Lapsed grace period (days) - 15



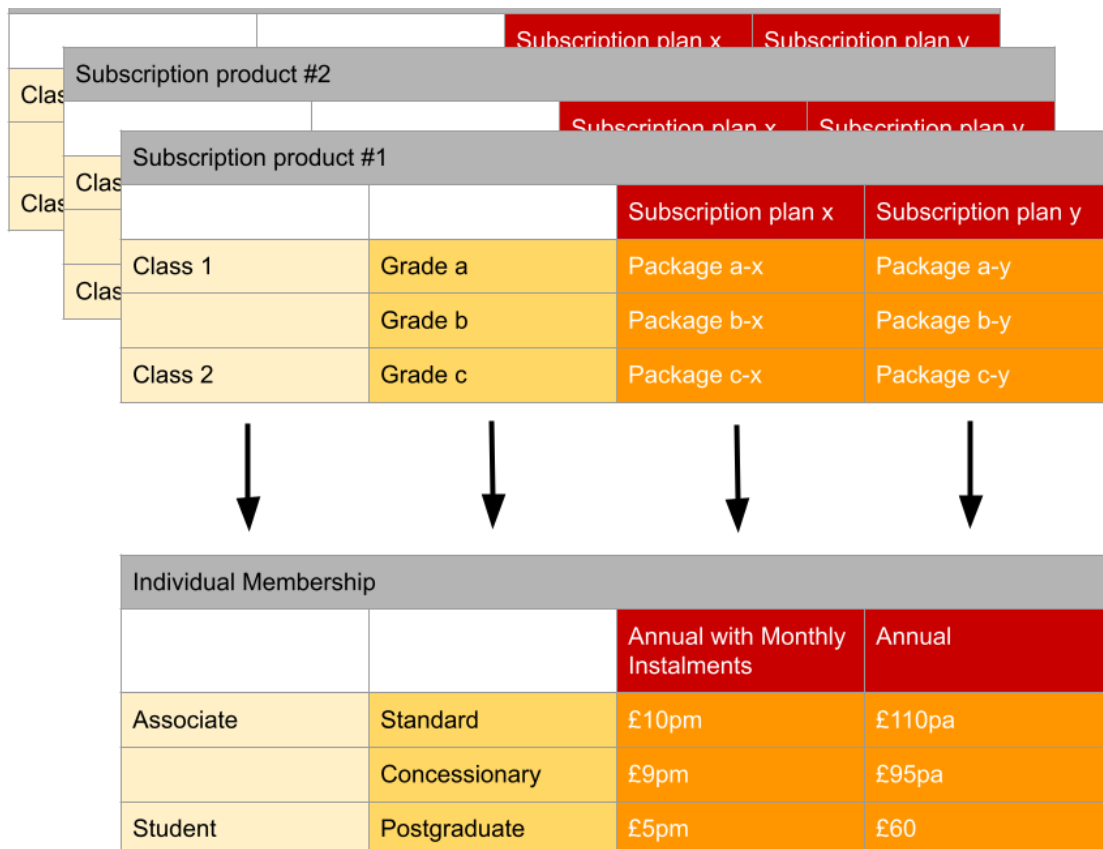
So if the member takes out a subscription on 1st January then

Date	Subscription Status	Actions
1st December	Active (renewable)	<ul style="list-style-type: none"> • Be able to renew their subscription • Get notified by a system email to renew • See a call to action in their members area to renew via the Renewal widget
31st December	Active (Payment overdue)	
10th January	Lapsed	<ul style="list-style-type: none"> • They can still renew their membership at this point • They still see any call to actions via the Renewal widget
25th January	Expired	<ul style="list-style-type: none"> • They will not be able to renew any more, and will need to rejoin • Their subscription can be reinstated by an administrator

Configuring subscriptions

Before we discuss creating a subscription, it's worth going through the subscription hierarchy and structure, as the terminology used may be different from what you're used to.

The diagram below demonstrates the structure of a subscription, and then how it can then be used to model a typical membership for an association



At the highest level we have a **subscription product**, for a lot of organisations there might only be one subscription product. This typically will be Individual Membership or Organisational Membership. The subscription products are created by Pixl8 and cannot be changed through the admin interface.

When the subscription product(s) are created, Pixl8 will setup whether classes are supported. A **class** allows categorisation of grades, and is next in the hierarchy.

At the lowest level is a **grade**, and it is the grade that users subscribe to.

If you think of grades being rows in a table, then the columns are called **Subscription Plans**. The subscription plan specifies the duration and payment frequency, and also how renewal works. Examples of a Subscription Plan might be a 6-month subscription, or an annual subscription which you pay in 12 monthly instalments.

Not every grade has to have a particular Subscription Plan, you can enable which ones are supported. So you may have some grades for example where you allow users to pay in instalments over a year, but other grades where you can only pay as a one-off fee. A grade/Subscription Plan combo is called a **Subscription Package**, and it is here where you would assign things like the price.

Home > Subscription products > Individual Application

Individual Application

Actions...

SubscriptionsPlans and pricingApplications

Subscription plans

Subscription plans segment your pricing by subscription duration and how often your customers pay for your product or service

Add plan

	Annual subscription, up front payment	Direct debit	Pay Monthly
→ Associate	<div>Associate: Standard - Upfront</div> <div>£58.00 (including VAT @ 20%)</div> <div>Active</div>	<div>Direct debit</div> <div>£53.00 (including VAT @ 20%)</div> <div>Active</div>	<div>Pay Monthly</div> <div>£5.80 (including VAT @ 20%)</div> <div>Active</div>
→ Basic	<div>Annual</div> <div>£49.00 (including Zero rated @ 0%)</div> <div>Active</div>	<div>Direct debit Student</div> <div>£49.00 (including VAT @ 20%)</div> <div>Active</div>	<div>Price not yet set.</div> <div>+ Set price</div>
→ Platinum	<div>Upfront payment</div> <div>€7,900.00 (including Zero rated @ 0%)</div> <div>Active</div>	<div>Price not yet set.</div> <div>+ Set price</div>	<div>Price not yet set.</div> <div>+ Set price</div>
→ Resident	<div>Fellow: Standard - Upfront</div> <div>£179.00 (including VAT @ 20%)</div> <div>Active</div>	<div>Direct Debit Fellow</div> <div>£174.00 (including VAT @ 20%)</div> <div>Active</div>	<div>Price not yet set.</div> <div>+ Set price</div>

Subscription grades

Subscription grades allow you provide pricing options based on variations on your offering

Add grade

Maintaining Subscription Products

Subscription Products need to be created by Pixl8 and will be setup for you as part of the project delivery. However there are a number of settings to control the overall product to be aware of. Access to the configuration settings is via the **Actions** button.

Home > Subscription products > Individual Membership

Individual Membership

Actions...

SubscriptionsPlans and pricingApplications

Search Subscription...

Configure Individual Membership

+ Add subscription

Certificates

Bulk create renewal orders



If you're looking for renewal settings, then from CRM v4.7 we moved them! They are now in the Subscription Plans, which means you can now have different renewal settings for each plan

Configuring membership numbers

Membership numbers get created automatically for each subscription. The membership number is tied to the user and the grade, so if the member renews at the same grade their membership number stays the same, however if they change grade, then a new membership number will be created for that subscription grade.

If you require a membership number to be unchanged for the life of the member, irrespective of grade changes or specific subscription products, then this is accomplished via a customisation, which you would need to discuss with your customer success manager.

You can edit the format of the subscription in the **Basic settings** tab

[Home](#) > [Subscription products](#) > [Individual Membership](#) > [Edit record](#)

Edit Subscription product, 'Individual Membership'

Basic settings Payment settings Applications settings Product picker Xero accounting

Product/Service name *

Individual Membership

Membership number format

Prefix

RM-

Padding

8

Suffix

-INDIV

Cancel

Save changes

- **Prefix** - the characters preceding the number itself
- **Padding** - how long the number is in total
- **Suffix** - the characters added after the number

For example with the settings above, a membership number would be RM-00000001-INDIV

Setting up default payment methods

You can specify payment methods for every subscription package, but that's a bit of a hassle, so if you define them initially for the whole product, and then fine tune them for specific packages or plans if necessary. Only active payment methods setup globally are available to choose from, so make sure you've done that step first.

On the Payment settings tab

The screenshot shows the 'Edit Subscription product, Individual Membership' settings page. The 'Payment settings' tab is active. The 'Currency' section shows 'Default currency' as 'GBP: Pound Sterling'. The 'Tax' section has 'Dynamic tax?' set to 'Fixed tax rate' with a description: 'You know the exact tax rate to charge your customer before they start the checkout process.' The 'Default tax rate' is '20% (VAT on income)'. 'Prices include tax' is checked. The 'Payment methods' section has two lists: 'Default payment methods' and 'One-off payment methods'. Both lists contain various payment gateway options like 'GoCardless Direct Debit', 'Credit/debit card via Stripe', 'Card via SagePay (RMS)', 'Invoice Live', 'Cheque', 'Manual Direct Debit', 'Credit/debit card via WorldPay', 'Credit/Debit Card via Slim CD', 'Card via SagePay (BVA)', and 'Stripe condition test'. A search bar is present for both lists. At the bottom, 'Only activate subscriptions on payment confirmation' is checked.

1. **Default currency** - choose from the currencies supported by CRM
2. **Tax** - Select an existing tax rate and select whether tax is included in the costs or if it gets added onto the prices shown
3. **Default payment methods** - You can pick multiple payment methods from the available ones setup from the Payments menu. These payment methods will show unless otherwise specified when a user attempts to buy or renew a subscription
4. **One-off payment methods** - There are a number of cases where users are asked to pay one-off charges for subscriptions, for example for a mid-term grade switch. These payment methods need to currently exclude payment by direct debit.

Configuring membership activation

By default a subscription will move to a status of Active when a user says they are going to make a payment, not necessarily when the actual payment is confirmed. When the user pays by an instant payment method, then this is inconsequential, however it is important when you allow payment to be taken by bank transfer or cheque.

If you check the **Only activate subscriptions on payment confirmation** setting, then only when the payment for the subscription has been confirmed will that subscription move from its existing status to Active.

If you have members who have defaulted on payment previously, then we'd recommend turning this setting on, but if you have members who frequently pay by bank transfer and join in order to get instant discounts from event conference tickets, then we'd recommend not turning this feature on.

Payment methods

Default payment methods *

GoCardless Direct Debit X

Cred

Card via SagePay (BVA) X

Strip

One-off payment methods *

Credit/debit card via Stripe X

C

Stripe condition test X Type to se

Only activate subscriptions on payment confirmation



Accounting

Allowing members to reactivate subscriptions

By default when a subscription goes to an expired status, the member cannot renew their membership and needs to contact an administrator who can reinstate it if needed, or alternatively the member needs to go through the join process once more.

If you would like members to be able to reactivate their subscriptions once they expire then, this can be done at payment plan level

Renewal timeline

Setup key points in the renewal timeline.

Renewal period (days)

30



Active grace period (days)

14



Lapsed grace period (days)

14



Enable reactivation by the user?



Reactivation period (days)

90



Reactivation behaviour



Create new subscription on payment

On payment of a reactivation, a new subscription will be created starting from the activation date and the old one expired



Resume from current subscription on payment

On payment of a reactivation, the existing subscription will be extended with a renewal date calculated from the activation date

1. Choose the subscription product and edit the payment plan which you would like to allow members to reactivate
2. On the **Automated Renewals** tab, select the option in the **Renewal timeline** section called **Enable reactivation by the user**
3. Choose how many days after they go into a state of expired that you allow them to be able to reactivate

4. Choose the behaviour on how you want the payment to be calculated
 - a. **Create new subscription on payment** - select this option if you only want the member to be charged from the date they want to reactivate. *For example*, if the members renewal date was January 1st and they opted for a 12month subscription, and on 1st February they wanted to reactivate, their subscription would start 1st February and renew 1st February 12 months later.
 - b. **Resume from current subscription on payment** - select this option if you want to charge the member for all the days from when their subscription renewal date. *For example*, if the members renewal date was January 1st and they opted for a 12month subscription, and on 1st February they wanted to reactivate, then their subscription would resume and their renewal date would be 1st January the following year.

Configuring accounting & invoicing settings

As per defining tax & payment methods against the whole product, and then modifying for a specific grade or plan as needed, the settings for accounting work the same way.

We won't cover accounting streams, payment reminders, accounting nominal codes and due dates in this guide, please read the specific finance guide to understand these features in more detail.

Accounting

Accounting stream

Type to search Accounting streams

Overdue payment reminders

Send payment reminders?

☐ No reminders

Do not send any reminders

☐ Use Payments settings default reminder schedule

Use the Payments default reminder action: No reminders

☒ Specific reminder set

Choose a specific set rather than the default

Reminder schedule

Individual subscription reminders

Xero accounting

The default Xero inventory items to use with sales and joining fees for this subscription. These can be overridden at a grade or package level.

Subscription inventory item

SUBS-individual-membership Individual Membership

X

+

Joining fee inventory item

Type to search Xero inventory items

+

Application fee inventory item

Type to search Xero inventory items

+

Invoice payment due dates

☒ System default

Payment will be required 30 days after the order is created

☐ Within a number of days of the order being raised

The due date will be based on on[] days after the order is created

☐ Within a number of days relative to the subscription dates

The due date will be based on the number of days before or after key subscription dates

Cancel

Save changes

However due dates do have some specific settings which are only applicable for subscriptions.

Invoice due dates

By default when an order or invoice is raised for anything to do with membership and subscriptions, the due date will be set to the global default (in the example below, the standard is 30 days).

You can however have due dates which are relative to key dates.

Ideally you want members to renew their membership as soon as it becomes open to them. So if i can renew 30-days before my renewal date, and i renew as soon as it opens, then my invoice will have a due date with the same date as my renewal date, assuming my standard terms are payment within 30-days.

However, if I choose to renew the day before my renewal date, and again choose a payment method such as bank transfer, then on a 30-day payment term I don't need to pay until 29 days after my renewal date. If you have the **Only activate subscriptions on payment confirmation** setting, then depending on your grace period settings, it could lead to members subscriptions becoming expired.

To prevent this from happening, you can make the due dates relative to the subscription renewal date. So with the setting below, if i renew the day before my renewal date, then the due date of the invoice will be 5 days after my renewal date.

If all of your subscriptions are paid via an instant payment method or by a recurring payment method like direct debit, then this isn't something you really need to worry about, but if you allow members to pay by bank transfer then do take a look at these settings.

Invoice payment due dates

☐ **System default**
Payment will be required 30 days after the order is created

☐ **Within a number of days of the order being raised**
The due date will be based on on 1 days after the order is created

☒ **Within a number of days relative to the subscription dates**
The due date will be based on the number of days before or after key subscription dates

Creation date	<input type="button" value="On creation date"/>	<input type="button" value="After"/>	
Renewal date	<input type="button" value="On renewal date"/>	<input type="button" value="Before"/>	<input checked="" type="button" value="After"/> <input type="text" value="5"/> Day(s)
Instalment date	<input type="button" value="On instalment date"/>	<input type="button" value="After"/>	

Maintaining classes

If you are viewing a Subscription Product that has classes enabled, then when you go to the plans & pricing tab, you'll see a slightly different layout in order to maintain classes than you'll see normally.

Corporate Membership

Actions...

Subscriptions Plans and pricing Applications 26

Subscription plans
Subscription plans segment your pricing by subscription duration and how often your customers pay for your product or service
Add plan

	Annual	Bi-annual	Monthly
Standard			
→ Small	Small annual membership £800.00 (including VAT @ 20%) Active	Price not yet set. + Set price	Small monthly membership £59.99 (excluding VAT @ 20%) Digital product Active
→ Medium	Medium up front £1,500.00 (including VAT @ 20%) Active	Bi-annual and grade, Standard > Standard: Medium £30.00 (including VAT @ 20%) Inactive	Monthly and grade, Standard > Standard: Medium £99.99 (including VAT @ 20%) Active
→ Large	Price not yet set. + Set price	Bi-annual Large £600.00 (including VAT @ 20%) Active	Price not yet set. + Set price
Super			
→ Small	Price not yet set. + Set price	Price not yet set. + Set price	Price not yet set. + Set price
→ Large	Super annual £2,499.99 (including Zero rated @ 0%)	Price not yet set. + Set price	Annual subscription, monthly payments and grade, Super ... £249.99 (including Zero rated @ 0%)

Classes and grades
Classes and grades allow you provide pricing options based on versions

1 Add class

2

3

1.Adding a class

2.Editing and deleting a class

3.Adding a grade to a class

How to add or edit a class

- To add a class click on the Add Class link shown on the Plans & Pricing tab
- On the **basic settings** tab

Home > Subscription products > Corporate Membership > Plans and pricing > Add Subscription class

+ Add Subscription class

Basic settings Class picker

Class name *

Description

- Class name** - this is displayed to users as well in the admin and identifies the name of the class
- Description** - this is only displayed in the admin

Maintaining grades

Subscriptions Plans and pricing Applications

Subscription plans
Subscription plans segment your pricing by subscription duration and how often your customers pay for your product or service
Add plan

	Annual subscription, up front payment	Direct debit	Pay Monthly
→ Associate	Associate: Standard - Upfront £58.00 (including VAT @ 20%) Active	Direct debit £53.00 (including VAT @ 20%) Active	Pay Monthly £5.80 (including VAT @ 20%) Active
→ Basic	Annual £49.00 (including Zero rated @ 0%) Active	Direct debit Student £49.00 (including VAT @ 20%) Active	Price not yet set. + Set price
→ Platinum	Upfront payment €7,900.00 (including Zero rated @ 0%) Active	Price not yet set. + Set price	Price not yet set. + Set price
→ Resident	Fellow: Standard - Upfront £179.00 (including VAT @ 20%)	Direct Debit Fellow £174.00 (including VAT @ 20%)	Price not yet set. + Set price

Subscription grades
Subscription grades allow you provide pricing options based on variations

1. Add grade

2. Edit grade

3. Delete grade

1.Adding a grade

2.Editing a grade

3.Deleting a grade

How to add or edit a grade

- To add a grade click on the **Add Grade** link shown on the **Plans & Pricing** tab or if you are trying to add a grade where your subscription product has classes, then click on the **+** button next to the class you wish to add it under
- On the **basic settings** tab

+ Add Subscription grade

Basic settings Membership applications Grade picker Xero accounting

Grade name *

Description

- Grade name** - this is displayed to users as well in the admin and identifies the name of the grade
- Description** - this is only displayed in the admin

Maintaining subscription plans

Subscription Plans govern how long a subscription across all grades lasts, and how the payment of them works. You can have as many subscription plans as you like, and the member will ordinarily choose a subscription plan as part of their join and renewal process.

Subscriptions Plans and pricing Applications

Subscription plans segment your pricing by subscription duration and how often your customers pay for your product or service

1 Add plan

	2	3	
	Annual subscription, up front payment	Direct debit	Pay Monthly
→ Associate	Associate: Standard - Upfront £58.00 (including VAT @ 20%) Active	Direct debit £53.00 (including VAT @ 20%) Active	Pay Monthly £5.80 (including VAT @ 20%) Active
→ Basic	Annual £49.00 (including Zero rated @ 0%)	Direct debit Student £49.00 (including VAT @ 20%)	Price not yet set. + Set price

1.Adding a plan

2.Editing an existing plan

3.Deleting a plan

How to add and edit a subscription plan

- To add or edit a subscription plan click on the **Add Plan** link shown on the **Plans & Pricing** tab or click on the pencil icon next to the plan you want to edit
- On the **key information** tab
 - Plan name** - This is an internal title
 - Description** - This is an internal description
 - Subscription duration** - This is how long the subscription will last for before the user will need to renew again. The default options are Annual, Monthly, Quarterly and Bi-annually however this can be customised for different lengths if required.
 - Pricing** - this is what model of payment is supported on the plan. If it is **Fixed priced**, then everyone will pay whichever value you specify when you create the package. **Manual priced** subscriptions are determined by an administrator when they create the subscription or configure the renewal, so you can charge anything you like. Manual priced subscriptions are covered in more detail in a separate section of the user guide
- On the **Payment schedule** tab you can choose to spread the cost of the subscription across a number of payments spread evenly across your subscription duration rather than as a single upfront payment. The possible instalment frequency available does depend on the subscription duration. Paying by instalments is covered in more detail in the **Paying by Instalment** section
- The **Automated Renewals** tab governs if and how renewals are handled by CRM. Setting up renewals is covered in great depth in the **How to configure renewals for a subscription** section
- On the **Plan picker** tab the promo fields are used during the user join/apply process to describe and potentially highlight specific subscription plans. By default it will show the duration and price applicable for the grade you have selected, so these

fields allow a large amount of customisation to how they are displayed

- Promo tag** - this is a short highlighted word to really help focus the user to this particular plan e.g. Best Value
- Promo title** - this the title of the plan
- Promo description** - this rich text description which you can use to explain the intricacies of a particular plan



Do be aware that changing subscription durations and payment instalment frequency is only possible while you don't have users with a subscription on that particular plan. If you need to change a live subscription plan, then contact support

Configuring subscription packages

A subscription package specifies exactly how much a particular grade and subscription plan combination will cost, and if indeed it is even available.

	Annual subscription, up front payment	Direct debit	Pay Monthly
→ Associate	Associate: Standard - Upfront £58.00 (including VAT @ 20%) ✓ Active	Direct debit £53.00 (including VAT @ 20%) ✓ Active	Pay Monthly £5.80 (including VAT @ 20%) ✓ Active
→ Basic	Annual £49.00 (including Zero rated @ 0%) ✓ Active	Direct debit Student £49.00 (including VAT @ 20%) ✓ Active	Price not yet set. + Set price
→ Platinum	Upfront payment €7,900.00 (including Zero rated @ 0%) ✓ Active	Price not yet set. + Set price	Price not yet set. + Set price

1.Adding a new subscription package

2.Editing an existing subscription package
3.Deleting a subscription package

In the example above, we have 3 grades and 3 different subscription plans. When a user goes through the join or renewal process and they are joining on the **Associate** grade, then they will be able to choose between 3 different subscription plans - annual subscription with upfront payment, Direct debit and Pay Monthly.

However those users on the **Platinum** grade will only have the option of annual subscription with upfront payment.

How to add and edit a subscription package

1. on the **Plans & Pricing** tab click on the **Set Price** button to add a new package or to edit an existing subscription package click on the pencil icon next to the package you want to update
2. On the basic settings tab
 - a. **Package name** - this is internal only and defaults to a combination of the the subscription plan title and grade
 - b. **Base price** - this is the price of each instalment for the duration of the subscription. So if your subscription plan is a one-off payment, then this is the total price, but if your subscription plan is annual but with monthly instalments, then this is the price for each instalment
 - c. **Joining fee** - this is only charged when the subscription is initially created for them as a one off fee. This appears as a separate line item in their invoice if applicable.
 - d. **Currency** - Currency of the base price and joining fee
 - e. **Tax** - Select an existing tax rate and select whether tax is included in the costs or if it gets added onto the prices shown
 - f. **Payment Methods** - by default all of the payment methods setup for the Subscription Product will be available for the user to select from. However if your subscription plan is for a specific payment method, then unselect the **Use default payment methods** option and choose the appropriate method. For example, if you give a special price for people who pay by direct debit, then you only want this method available to them.
 - g. **Invoice labels** - these appear on the orders and invoices
 - h. Package Activation
 - i. **Active** - Only active packages will show up as a subscription plan which can be joined or renewed as. Inactive packages can still be chosen when you create a subscription manually via the admin
 - ii. **Valid from & Valid To** - If these fields are left blank, then an active package will always be available, however when populated the package will be active within the dates added

Managing which grades and plans users can join

Enabling & configuring the subscription product

If there is a join online process, then this is ordinarily developed specifically for each client, however you can still normally control some aspects of how it appears during the join online flow.

Most of the time the join process allows users to select the type of membership they would like to purchase, and the first step is for them to select a subscription product if there is more than one available.

- If you would like users to see the subscription product then ensure the **Enabled in product picker** is active
- The promo fields allow you to present an overall impression of the product.
- **Promo tag** - this is a short highlighted word to really help focus the user to this particular grade e.g. Recommended or Best Value
- **Promo title** - this the title of the product
- **Promo description** - this rich text description which you can use to explain the member benefits of this particular product
- **Promo image** - this image will show for the product rather than the promo price and price description fields
- **Promo price** - short price description e.g. From £20
- **Promo price description** - longer price description e.g per annum by direct debit

If you have classes enabled for your subscription product, then on editing a class, you see all the settings to manage if it is visible to users and how it appears on the **class picker** tab

1. **Enabled in class picker** - By default a class and therefore any grades within it will not be displayed and available to be picked during the join and application process by users. If you do want the users to be able to join/apply for one of the grades within the class, then you need to ensure this option is turned on
2. **Promo image** - this image will only show during the user join/apply process against the particular class
3. **Promo title** - this title will only be displayed during the user join/apply process against the particular class, it is recommended that this is the name of the class
4. **Promo description** - this rich text description will only show during the user join/apply process against the particular class

Enabling & configuring a subscription product grade

When you edit a grade, you see all the settings to manage if it is visible to users and how it appears on the on the **Grade picker** tab

1. **Enabled in grade picker** - By default a grade will not be displayed and available to be picked during the join and application process by users and will only be available for manually create a subscription for.
2. The promo fields are used during the user join/apply process to describe and potentially highlight specific grades. Due to the potential pricing complexities of being able to have multiple Subscription Plans for a grade, it is really useful to be able summarise costs and other features
3. **Promo tag** - this is a short highlighted word to really help focus the user to this particular grade e.g. Recommended or Best Value
4. **Promo title** - this the title of the grade
5. **Promo description** - this rich text description which you can use to explain the member benefits of this particular grade
6. **Promo image** - this image will show for the grade rather than the promo price and price description fields
7. **Promo price** - short price description e.g. From £20
8. **Promo price description** - longer price description e.g per annum by direct debit

Allowing members to pay by instalments

By default subscriptions are paid as one-off payments per duration, e.g. annually. You can however split the payment equally across multiple payments.

This payment schedule is visible both in the admin, and also the user in their mySubscriptions area.

Individual membership - Bronze annual subscription (monthly schedule)			
Grade:	Bronze	Start date:	01 March 2021
Renewal date:	22 October 2022	Subscription plan:	Monthly
Status:	ACTIVE		
Payment schedule			
22 Oct 2021	£47.99	↓	Payment received
22 Nov 2021	£47.99	↓	Payment received
22 Dec 2021	£47.99	↓	Payment received
22 Jan 2022	£47.99	↓	Payment received
22 Feb 2022	£47.99	↓	Payment received
22 Mar 2022	£47.99	↓	Payment received
22 Apr 2022	£47.99	↓	Payment received

Setting up instalments

To set up instalments for a subscription go to the *Payment schedule* tab on the subscription plan, and turn on Spread Payments, you'll then see the following fields:

1. **Payment frequency/schedule** - this is how often to take payments out. The values are determined by the subscription duration. So for example if you have chosen Annual as the duration, then you will be able to choose monthly, quarterly or bi-annually. However if you have chosen Quarterly as the duration, then you will only be able to spread the payments monthly
2. **Active grace period (days)** - This is the number of days the subscription will stay with a status of **Active** after the payment date of the instalment has passed. Although the status remains as **Active**, there will be a new sub-status of *Payment Overdue*. As soon as the number of days is reached, the subscription will go into a state of **Lapsed** if payment still hasn't been received. Typically when payment is taken by direct debit, there will be 5 or so days before the payment has been confirmed by the provider, so it is recommended that this is taken into account.
3. **Lapsed grace period (days)** - This is the number of days after the Active grace period, that the subscription will have a status of **Lapsed** before the status will change to **Expired**. As with the Active grace period, there will be a sub-status of *Payment Overdue*.

How do instalment orders get created?

An order will automatically get created by the system on the schedule date, the price and billing address will be set from the information collected when the subscription was initially created, although it is possible to change these if needed.

If the user is paying by a recurring payment method like GoCardless, then this will be sent to them automatically to take the payment. Otherwise the user can either pay the order via their subscription area or invoice history if paying by card, or if they are paying by BACS or standing order, then the admin will need to mark the payment as being received against the order raised.

Can i change the date the instalment payments are taken?

By default the payment dates are either based on when you initially took out the subscription if you have a rolling subscription or by fixed renewal date, and the payment schedule is automatically created.

To change the payment dates

1. Find the users subscription you want to change
2. On the **Payment Schedule** tab, under the **Payment schedule actions** select **Change date for all future payments**

renewal: Approved

Activity/Order history		Payment schedule	
		Payment schedule actions	
Scheduled date	Price	Order	
07 Oct 2021	£52.78	✓ Completed	Change price for all future payments
10 Nov 2021	£47.99	✓ Completed	Change date for all future payments
10 Dec 2021	£47.99	✓ Completed	Cancel payment schedule
10 Jan 2022	£47.99	✓ Completed	Change billing address for all future payments

3. Select the new day of the month, and click on the change date button

Change date for all future payments

» Tony Stark: Individual membership - Bronze annual subscription (monthly schedule)

Day of month *

 Back

 Change date for all future payments

Can I change the price of the instalments?

1. Find the users subscription you want to change
2. On the **Payment Schedule** tab, under the **Payment schedule actions** select **Change price for all future payments**

Activity/Order history		Payment schedule	
		Payment schedule actions	
Scheduled date	Price	Order	
07 Oct 2021	£52.78	✓ Completed	Change price for all future payments
10 Nov 2021	£47.99	✓ Completed	Change date for all future payments
10 Dec 2021	£47.99	✓ Completed	Cancel payment schedule
			Change billing address for all future payments

3. Enter the new price and a reason for the change (this is displayed internally only), and click on the submit button

Change payment schedule price

» Tony Stark: Individual membership - Bronze annual subscription (monthly schedule)

New price *





Reason *

 Cancel

 Submit

Can I change the billing address for the instalments?

1. Find the users subscription you want to change
2. On the **Payment Schedule** tab, under the **Payment schedule actions** select **Change billing address for all future payments**

Activity/Order history		Payment schedule	
Scheduled date	Price	Order	
07 Oct 2021	£52.78	✓ Completed	<div>Payment schedule actions</div> <ul style="list-style-type: none"> Change price for all future payments Change date for all future payments Cancel payment schedule Change billing address for all future payments
10 Nov 2021	£47.99	✓ Completed	

3. You can change the billing context for all future instalment orders and also select an existing address for the contact/organisation or enter a new one

Change billing address for all future payments

Billing type * ☐ **User chooses**
User can choose to bill personally, or to their organisation

☒ **Personal**
Billing details contain no organisation information and assumed billing is for the individual

☐ **Company**
Billing details always contain organisation fields and prefill with contact's organisation if available


First name *

Last name *

Email address *

☐ 21b Baker Street, London, Please select one, W1U 6SG, United Kingdom

☐ 10880 Malibu Point, Malibu, CA, 90265, United States

Billing address country * 

Billing address line 1 *

Billing address line 2

Billing address town *

Billing address region

Billing address postcode

 Cancel

 Done

Cancelling a subscription that is payable by instalments

If you cancel a members subscription who pay by instalments then the payment schedule will automatically be cancelled, and no future orders for these instalments will be created.

Cancelling a payment schedule

You may have a situation where you want the user to keep their subscription, but you just want to cancel the payment schedule. For example the user is failing to keep up with their regular payments, and you have agreed to send them a separate invoice for the remaining of the subscription amount as a single payment.

You can do this via the admin by going to the **Payment Schedule** tab for the subscription, and selecting **cancel payment schedule** under the **Payment schedule actions**

Activity/Order history			Payment schedule	
Scheduled date			Price	Order
07 Oct 2021			£52.78	✓ Completed
10 Nov 2021			£47.99	✓ Completed
10 Dec 2021			£47.99	✓ Completed

Payment schedule actions

- Change price for all future payments
- Change date for all future payments
- Cancel payment schedule**
- Change billing address for all future payments

What happens if I switch the grade for a subscription that has an instalment payment schedule?

You can still grade switch users who have a subscription payable by instalments. If you switch it on renewal, then their existing payment schedule is not affected. If you switch it with immediate effect and the cost of the subscription is different, then you will be asked whether you want to keep the current payment schedule prices as they are or change them to that future payments will be for the cost of the new grade.

Switch grade confirmation

» Tony Stark: Individual membership - Bronze annual subscription (monthly schedule)

i This action will switch the current subscription to the new package: **Individual membership - Gold annual subscription (monthly schedule) (Annual (monthly schedule))**. Once switched, the subscription will continue to renew at **07 Oct 2022** using the new payment schedule price of **£10.99**.

This subscription has an existing payment schedule with 3 remaining scheduled payments at **£41.67**

Choose to keep these scheduled payments at the current grade pricing or to update all the future payments in this plan to the new grade pricing of £10.99.

Keep or update plan price * ☒ Keep current price
☐ Update to new grade price

Send confirmation email ☒

 Back

 Confirm switch

What happens if an instalment fails payment or just isn't paid?

Instalments by direct debit are handled in a very similar way to renewals if payment fails. Depending on whether you have configured payment retries in direct debit (called Success+ in GoCardless), the user will either receive the *Subscription auto instalment payment temporary failure notification* email if payment retries are possible, or *Subscription auto instalment payment permanent failure notification* email if they are unable to attempt another payment.

As described in the setup of instalments, there are settings for **Active grace period** and **Lapsed grace period** which determine when the subscription status's change. However once a payment date is in the past a sub-status will be added called Payment Overdue, and this will stay on the status regardless of its status, so in other words you may have an overall status of **Active (Payment Overdue)** , **Lapsed (Payment Overdue)**, **Expired (Payment Overdue)**

How do I configure instalments so that it allows for multiple unpaid months before a subscription expires?

If someone is paying monthly instalments and for whatever reasons, they don't pay the instalment, then you may wish to configure things so that you don't expire membership until an additional instalment has not been paid either.

To do this you'll need to increase the number of dates for **Active grace period** and/or **Lapsed grace period** to be more than the instalment frequency, so for a monthly instalment if you increase the grace period to 45-days, then you will effectively allow for 2 outstanding payments before the subscription could expire, giving a reasonable amount of time for chasing payments.

If the user does have multiple instalments that need to be paid, then currently each one will have to be paid for individually if paying by card.

Manually priced membership subscriptions

Prices are normally added to the package for a subscription meaning that all users will pay the same amount for the grade & pricing plan combination (the package). Fixed priced subscriptions, also mean that we can display the prices on the website and other communication.

The other model for subscription fees is manual priced. This means that administrators can decide how much to charge a member for their subscription when it is created, and can specify how much to charge the member when it is renewed.

Because of this however, it does have one major drawback, which is that members will not be able to select a manual priced subscription during the join online process, or switch to a manual pricing plan during renewal. This is an administrative only feature.

Configuring a manually priced subscription plan

Manual priced subscriptions are defined at the plan level for a subscription.

+ Add Subscription plan

✎ Key information

📅 Payment schedule

🔄 Automated Renewals

🔄 Fixed Renewal dates

🌱 Subscription plan picker

📊 Accounting

Name, description and duration

Plan name *

Description

Subscription duration *

☒ Annual

Annual subscriptions are valid for one year

☐ Monthly

Monthly subscriptions are valid for one month and will typically auto renew to form a rolling membership.

☐ Quarterly

Quarterly subscriptions are valid for three months and will typically auto renew to form a rolling membership.

☐ Bi-annually

Bi-annual subscriptions are valid for six months and will typically auto renew to form a rolling membership.

Pricing *

☐ Fixed

You set the price for each grade and the price will be the same for every subscription on that grade.

☒ Manual

Every time you create the subscription you need to specify the cost.

When you **create a new plan** for your subscription product, on the **Key information** tab, select the **Manual** option for the **pricing** field. The rest of the configuration for the plan remains the same as it normally would be.

When you then **create packages** for the new manual pricing plan, it's not what you can do, but rather what you can no longer do. You'll see an absence of being able to put a price on a package. You can still specify the tax rate and everything else, its just the amount field which no longer shows.

When you view the pricing grid, the manual priced subscriptions show slightly different.

[NEW] Fixed Year Credit/Debit card		1st Jan renewal - Manual Price Subscription		De
<div>✓ Active</div> <div>Duration: Annual</div> <div>Price: £145.00 per year (Incl. Zero rated @ 0%)</div>		<div>✓ Active</div> <div>Duration: Annual</div> <div>Price: Price set on creation per month (Excl. VAT @ 20%)</div>		<div>✓</div> <div>✓</div> <div>Du An</div> <div>Pri £12 (E</div>
<div>✗ Inactive</div> <div>Duration: Annual</div>		<div>+ Add package</div>		

Creating a manually priced subscription for a new member

With the plan setup and packages configured, when you create a new subscription via the admin and choose a manually priced subscription, you'll notice a few additional fields when you get to the **fee** step.

+ Add Subscription



Subscription fee

The amount the user pays will be pro-rata...

- ☐ Waive fee until next payment due
There will be no charge for the applicant, and their subscription will start immediately
- ☒ Manual price
The applicant will pay the regular amount for the subscription

Join fee	<input type="text" value="0"/>
Monthly instalment amount	<input type="text" value="0"/>
Initial payment	<input type="text" value="0"/>
Renewal date *	<input type="text" value="2025-01-01"/> x ▾
Next payment date *	<input type="text" value="2024-07-01"/> x ▾
Discount code	<input type="text"/>

Depending on whether there are instalments or if the subscription is a one-off payment, there will be a number of fields where you can add the price you want to charge for the subscription. If it is not specified the default renewal price will be the initial price you enter.

Setting renewal prices for members on a manual priced subscription

By default and unless you specify otherwise, members will be charged the same price for their renewal as either their initial price or their last renewal price, however this can easily be changed in the admin.

To set the renewal price for an individual subscription, when you view the subscription, under the **Actions** button menu, click on the option that says **Change renewal price**. The subsequent form will show you the current renewal price, so simply change it accordingly and click Save.

[Subscriptions](#) > Coco Karen: 1st Jan renewal - Manual Price Subscription - Bronze

Manual Price Subscription - Bronze

Individual Membership
1st Jan renewal - Manual Price Subscription - Bronze
Bronze

Payment method: Manual
Current price : £10.00
Renewal price : £10.00
Joining fee : £0.00

Actions

- Edit dates/membership no/address
- Download certificate
- Switch plan
- Pause subscription
- Cancel subscription
- Change renewal price
- Match subscription with mandate

You can also set the renewal price in bulk. Simply go to the overall subscription product, click on the **Manual prices** left hand tab, select all of the subscriptions you want to set the renewal price for, and from the **Batch actions** button menu, click on the option that says **Set renewal price**

Individual Membership

The screenshot shows the 'Subscriptions' management interface. On the left, there's a sidebar with 'All', 'Manual prices', and 'Renewal approval'. The main area has a search bar 'Search Subscriptions...' and several filter tabs: 'Doms', 'Payments', 'Plans', 'Product', 'QA', 'Status', and 'Sub status'. Below these are filter buttons: 'Ungrouped', 'Auto renewing', 'Corporate membership subscriptions', 'Lapsed (able to cancel)', 'Missed payments subscriptions', 'Ready for renewal', 'Status is pending', and 'Subscription Status is Active'. A table displays subscription details with columns: Status, Contact, Package, Renewal date, Duration, Instalment, and Manual price. One record is shown: 'Active', 'Aurlie Rentoll', 'Annually (with quarterly payments) - Bronze', '20 Jun 2023', 'Annual', 'Quarterly'. Below the table, it says 'Showing 1 to 1 of 1 records, results per page: 10'. There are buttons for 'Batch update...', 'Delete selected', and 'Batch actions...'. A dropdown menu for 'Batch actions...' is open, showing options: 'Switch plan on renewal', 'Switch grade', and 'Set renewal price'.

NOTE: Do be aware that if there is already a renewal order, then if you change the renewal price, it might not update the existing order automatically. Therefore in this situation, go into the subscription and from the **Actions** button list, select **Regenerate renewal order**

Multi-contact membership subscriptions

Individual memberships apply to the person who purchases the subscription, and you can use rules on organisation subscriptions, so that contacts who work for that organisation can be seen as members, or it can just be the organisation as a whole.

Multi-contact subscriptions offer a different configuration of membership, whereby individuals or organisations can include a number of specific members on the subscription. Typically this could be a family membership, allowing up to 5 members of the family to be added, or an organisational membership allowing up to 20 staff members to be added.

It is worth noting that the contacts added to a multi-contact subscription do not have their own subscription, but are just named on the subscription. Rules are available which easily allows filtering on contacts who belong to a multi-contact subscription, and both administrators and the subscription owner are able to manage the contacts named on the subscription.


Multi-contact subscriptions are a special type of subscription product, and require a small amount of development work by Pixl8 to enable them. If you do not have them enabled currently, but do require them, then please get in contact with your customer success manager.


Configuring a multi-contact subscription


Once you have a multi-contact subscription product, the configuration of it is pretty simple on top of the way you configure a regular subscription.


You can manage how many and what type of contacts you can add to a subscription at the subscription package level. For example if you wanted to offer family membership you could create grades for a small, medium and large family, with an annual one-off payment plan. Each of the grade/plan combination is called a package, and it is here where you would configure things


 Edit Subscription package, 'Annual rolling subscription - Big family'

 You are viewing the most up to date version of this Subscription package


 Basic settings

 Renewals


 Xero accounting


 Accounting



Basic

Package name  Annual rolling subscription - Big family


Pricing


Price per year  100


Joining fee  0


Currency  GBP: Pound Sterling 


Subscription members

 Configure the maximum number of contacts that can be registered against a subscription on this package. Set to zero (0) to have unlimited members.

Maximum members  5

Select members to add 

 **Manually**
Owner will enter name and email address

 **From existing contacts**
Owner can add any contact from their own organisation

1. **Maximum members** - this is the total number of contacts that can be added to the subscription, if you put Zero, then it will allow unlimited number of contacts to be added
2. **Select members to add** - There are 2 ways that you can add contacts to a subscription, which one you pick largely depends on whether this is an individual or organisational membership
 - a. **Manually** - With this option either the subscription owner or an administrator can add anyone to the subscription, and will be presented with a form to complete when they do to collect the required information. For a family membership for example, different members of the family could have any email address and the relationship between them would not typically be known in the CRM.
 - b. **From existing contacts** - With this option either the subscription owner or an administrator can add contacts which are already available in the CRM and have a relationship with the owner, e.g. they all work for the same organisation. When you select this option you can also bypass the contact needing to confirm they want to be on the subscription by checking the option called **Skip invitation confirmation**. So for example, if you are adding staff members to a subscription, you probably don't need them to accept the invitation in order to be added, you probably have the necessary rights to be able to add them.

Managing contacts on a multi-contact subscription via the admin

When you view a multi-contact subscription record in the admin, you'll notice an additional **Members** tab. You can only add a maximum number of contacts to it based on the configuration within the subscription package, and the number of available slots is shown on the tab title.

Home > Subscription products > Family Membership > Subscriptions > Burty Sarath: Annual rolling subscription - YMB 2 children

Burty Sarath: Annual rolling subscription - YMB 2 children

Burty Sarath
M-00078
Active
25 Mar 2024 – 26 Mar 2025
sdldst, 3532, United Kingdom

Family Membership
Annual rolling subscription - YMB 2 children
YMB 2 children

Payment method: GoCardless Direct Debits
Signup order: ORD-08156
Current price: £30.00
Renewal price: £30.00

Activity/Order history Members (1/2)

Search Subscription members...

No filters have been created for this view. Use the advanced filter and hit the "Save for later" button to save filters that can be shared with your team.

Contact	Date added	Accept invite date	Invitation status
Mr Steve Dowle	26 Jun 2024 05:47:05 PM	26 Jun 2024 05:47:05 PM	Completed

Showing 1 to 1 of 1 records, results per page: 10

+ Add member

To add an existing contact to a multi-contact subscription

If the subscription package is configured so that members are added **From existing contacts**, then the process of adding someone is straightforward and immediate

1. Click on the **Add member** button at the bottom of the list of existing members on the **Member** tab, or under the **Actions** button click **Add member**
2. Pick a contact from the drop down list. If the contact doesn't appear, then it will mean that the relationship between the contact and the subscription owner isn't defined. Normally this means check to see if the contact has been added as an active contact to the same organisation.

To remove a contact from a multi-contact subscription

To remove a contact, you simply need to click the delete icon next to the contact you wish to remove from the subscription.

How users manage contacts on a multi-contact subscription

Users can manage all aspects of a mutli-contact subscription from within their mySubscriptions page

Annual pay monthly – Big family

Big family

Options ▾

Status

Active

Subscription number

M-00075

Payment schedule

£0.00 per month

Next billing on 01 Jan 2024

Payment method

Direct debit, bank account XXXXXX11

Start date

01 Dec 2023

Renewal date

01 Dec 2024

Manage payment methods

Billing address

14-16 Sadler Street, Middleton,
Manchester, M24 5UJ, United Kingdom

Members

1-1 of 1 members

Add a member

Mr Steve Dowle

Pending

steve.dowle@pixl8.co.uk

Resend invite

Remove

View payments ▾

To add an existing contact to a multi-contact subscription

On the subscription setup, if the **Select members to add** is set as **From existing contacts**, then the add process is as follows

1. From the mySubscriptions page, click on the button called **Add a member**
2. Select from the drop-down the contact you would like to add
3. If the contact doesn't exist, and this is an organisational subscription, then go to the **edit organisation** page, click on the **users** tab, and add a new person to your organisation
4. If the setting on the multi-contact subscription has **Skip invitation confirmation** enabled, then the contact will be added immediately and will now show on the list of members, otherwise they will be added in a **Pending** state until the contact has approved being added via the email they receive

To add a new contact to a multi-contact subscription

On the subscription setup, if the **Select members to add** is set as **Manually**, then the add process is as follows

1. From the mySubscriptions page, click on the button called **Add a member**
2. Complete the details for the contact you want to add and click submit
3. The contact will be added in a **Pending** state until the contact has approved being added via the email they receive

Flow for invitees to approve being added to a subscription

If the setting on the multi-contact subscription has **Select members to add** is set as **From existing contacts** and doesn't have **Skip invitation confirmation** enabled, or the **Select members to add** is set as **Manually** then the contact will first be sent an email inviting them to the subscription which they will need to confirm before they are considered members on the subscription.

1. If the email address is already in the CRM as an active contact, then this invitation will be associated with that contact, otherwise a contact is created in CRM automatically.
2. A system email called **Add contact to multi members subscription invitation email** is sent to them which includes a link they need to click on.
3. When the contact clicks on the link, they will need to login if they already have a password set, otherwise they will be asked to set a password
4. The contact will then need to accept the invitation
5. Once they have accepted, then on their mySubscriptions it will show as them being a member on the named persons subscription

Current subscriptions **1**

Past subscriptions **0**

Annual rolling subscription – YMB 2 children YMB 2 children

Subscription owner	Start date	Renewal date
Burty Sarath	25 Mar 2024	26 Mar 2025
Billing address	sdfdsf, 3532, United Kingdom	

To resend an invitation to a multi-contact subscription

Where contacts aren't automatically accepted onto a subscription and need to go through the process of accepting the invitation, if they haven't accepted the invitation, then users can resend the invitation via the system

1. Go to the mySubscriptions page
2. On the list of members on the subscription click on the **Resend invite** button to the member you want to resend the invitation to

Note: the resend invitation email is a different system email to the original invitation email, so if you need to amend the copy on the email look for the system email called **Resend multi members subscription invitation email**

To remove a contact from a multi-contact subscription

Depending on the configuration of the multi-contact subscription, there is normally a limit to the number of members that can be added. To remove someone from the subscription

1. Go to the mySubscriptions page
2. On the list of members on the subscription click on the **Remove** button next to the member you want to remove

Fixed Renewal dates

Rolling versus fixed Renewal dates

By default a subscription will start when it is created and will end based on the duration in the subscription plan, this is called a rolling subscription. With a rolling subscription, renewals will occur continuously throughout the year.

Many organisations operate memberships that end on a fixed date which means no matter when a subscription is created the end date of the subscription will always be the same date and not based on the duration. Typically this would be the end of the calendar or financial year. With fixed dates, renewals will occur on the same day for all users.

Hand in hand with a fixed renewal date is the concept of a pro-rata subscription. Rather than paying a fixed amount of money when you join, with pro-rata you will only be charged for how long is left until the renewal date, and then when you renew you will pay the regular amount.

Setting up a fixed renewal date and configuring pro-rata

The screenshot shows a configuration interface for 'Fixed Renewal dates'. At the top, there are five tabs: 'Key information', 'Payment schedule', 'Automated Renewals', 'Fixed Renewal dates' (which is active and highlighted with a green border), and 'Plan picker'. Below the tabs, the title 'Fixed renewal dates' is displayed. A light blue informational banner states: 'Configure a month and date for fixed date renewals. I.e. If all subscriptions renew on the same date every year.' Below this, there are three main sections: 1. 'Fixed renewal date?' with a toggle switch that is turned on (orange). 2. 'Renewal day' and 'Renewal month' dropdown menus, both currently showing 'Select an Option'. 3. 'Pro-rata calculation' with a radio button selected for 'Day pro-rata'. A sub-note explains: 'The subscription price will be calculated by multiplying the effective day rate by the number of remaining days before renewal'.

1. On the **Fixed Renewal dates** tab, turn on the **Fixed renewal date** switch
2. Select the **Renewal day & Renewal month** for when your fixed renewal/membership year is
3. The only current Pro-rata calculation available is a day based pro-rata. This means the subscription price will be based on the number of days remaining until the renewal date

How to reduce near concurrent subscription payments when a user joins close to the fixed renewal date

For most of the year when you join it makes sense that you only pay up what is remaining until the end of the fixed renewal date. However as you start to approach the fixed renewal date, you probably want to employ a different strategy.

We'll walk through an example to give a clearer idea of how things could be configured.

If you have a fixed renewal date of 1st January, and the user pays an annual fee and joins at any point from 1st January until the 1st November, then it makes total sense that they should pay the remainder fee of what is left between the date they joined and the 1st January.

On 1st December you might want to allow existing members to start the renewal process.

If a user joins on 15th November then what should the process for that user be? Without any configuration, the user will pay upfront for the next 6 weeks of membership, and then 2 weeks later they will get notification to begin renewal.

If the user joins on 1st December, then the user will pay for 4 weeks membership, and then immediately get notice to renew their membership.

If the user joins on 25th December whilst digesting an inordinate amount of turkey, then they will only get 6 days of membership before their subscription enters a state of lapse.

To cater for all of these situations, you can decide at what point in the year that they don't just join for the remainder of the renewal year, but they join for the next as well. You can also configure whether you combine the fee for the remainder and the following year, or whether you waive the fee for the remainder, so they just pay for next year.

So going back to the 25th December, with rollover configured, the user would pay for the equivalent of 371 days of their subscription. Or if you're waiving the fee then they would just pay for next year's fee, but their subscription would last for 371 days.

This can be illustrated with this configuration for the renewal rollover.

Renewal rollover

ⓘ If users join after a certain date do they continue until the end of the current period and then need to renew or do they take out a subscription for the next period as well?

Rollover ☒

Rollover Day

Rollover month

Remaining amount ☒ **Append onto next subscription**
 The remainder of the fixed term price is added onto the cost of the next subscription

☐ **Waive the fee**
 The remainder of the fixed term price is waived

How to reduce near concurrent instalment payments when a user joins close to the date of their next instalment

With a fixed renewal period where a user pays for their subscription via regular instalments, the date when payment is taken is scheduled by CRM so that it neatly coincides with the renewal date, rather than being based on the date when the user took out the subscription.

So for example if the fixed renewal date is 1st January, and the user takes out an annual subscription (cost of £120pa) paid monthly on 20th September, the payments would be scheduled in this way:

20th September	1st October	1st November	1st December
£3.30	£10	£10	£10

Rather than based on when the user takes out their subscription which would look like:

20th September	20th October	20th November	20th December
£10	£10	£10	£3.30

Their first payment would effectively be for 10-days of their subscription, and then their subsequent payments for the whole month.

In this situation it might make sense to combine the initial payment with the cost of their next payment, which therefore reduces the number of payments required. So this would look like this:

20th September	1st October	1st November	1st December
£13.30	-	£10	£10

To set this up you need to configure the **Instalment payment rollover** settings on the **fixed renewal dates** tab in the subscription

Instalment payment rollover

i The instalment payment dates will be calculated on the fixed renewal date specified. When the applicant takes out a subscription, their first instalment might be close to the date of their next fixed instalment date.

You can control whether you bundle this initial instalment together with the next instalment cost so only a single payment is taken, and on what date this happens.

E.g if take payments on 1st of each month, and the join on the 20th of the month, how would you like to take payment? Should it take an initial payment on the 20th for the remainder of the month, and then take another payment 10 days later or should it all roll up into an initial payment for both? You can also choose whether to waive the remainder of the month fee, so they just pay initially for the cost of the following month.

Pay next instalment in initial payment? ☒

Days before instalment

Remaining amount ☒ **Append onto next instalment**
User pays the remainder of the instalment and the next instalment in one immediate payment

☐ **Waive the fee**
User pays for the just next instalment immediately, the remainder of the current instalment is waived

There are 2 choices with what to do with the remaining amount, the example above we have combined the remaining cost with the cost of the next instalment, and this will be the first payment they make.

You can also choose to **waive the fee**, so in our example above this would then look like:

20th September	1st October	1st November	1st December
£10	-	£10	£10

Configuring subscription renewals

By default when a subscription goes past its end date, its status will go from **Active** to **Expired**. Turning on **auto renewal**, allows contacts to renew their own subscriptions and provides more granular statuses for managing the renewal process.

With **auto renewal**, the action required by a user for renewal depends on what payment method they use for their subscription. If they pay via a recurring payment method like direct debit, then the user will **automatically be renewed**, unless their direct debit is cancelled or fails. If they pay by any other method, then the user will be required to go through a short **manual renewal process** and pay for their subscription.

There is an arsenal of features available to an administrator to ensure users know their subscription is available to renew - system emails, newsletters and announcements using rules, the renewals widget, and you can use these methods to steadily reinforce the message why membership is important to encourage renewal.

If the user's subscription will be automatically renewed then these messages will simply be letting the user know when their renewal will take place and how much their subscription will cost. For all others, they will need to click on the link in order to renew their subscription.

Changing when a contact can renew their subscription and for how long

A subscription product can have many subscription plans which control the length and payment frequency. Each plan also has their own renewal settings which determines when someone is eligible to renew..

In the subscriptions overview we discussed the subscription timeline, which explained how a status of a subscription transitions during its lifetime.

Key information

Renewals

Subscription plan picker

Automated renewals

Enable automated renewals? ☒

Renewal timeline

Setup key points in the renewal timeline.

Renewal period (days)

30

Active grace period (days)

14

Lapsed grace period (days)

14

Automated emails

Enable/disable automated renewal reminder/confirmation emails for this plan.

Email	Description	Help	Enabled
Renewal reminder	Reminder email sent to customers that make one-off payments (such as card payments)	Sent 30 days before subscription due date	<input type="checkbox"/>
Renewal notification	Notification email sent to customers on recurring payments (such as DD) notifying them that their subscription will renew and payment will be automatically taken	Sent 30 days before subscription due date	<input type="checkbox"/>

1. From the CRM menu, select the subscription product you wish to modify
2. In the *Plans & Pricing* tab edit the particular subscription plan you want to change

3. By default *Enable automated renewals* will be turned off. If you turn it on, then you'll see a number of options to control how renewal works
4. In the Renewal timeline section you'll see:
 - a. *Renewal period (days)* - this is the number of days before the contacts subscription end-date that you allow them to renew their subscription. During this time, they will still have an **Active** status, but a sub-status of **Renewal**
 - b. *Active grace period (days)* - this is the number of days after the end-date of their subscription that you still allow them to be **Active**, during this time they'll have a sub-status of **Payment Overdue**
 - c. *Lapsed grace period (days)* - this is the number of days after the *Active grace period* expires before their subscription expires. During this time their subscription will have a status of **Lapsed**. During this time a contact can still renew their subscription, but once they drop into a status of **Expired**, then the contact cannot renew, and will either need to go through the join online process again, or the subscription will need to be reactivated by an admin (see *Reinstating an expired subscription*)

Setting up automated emails when a subscription can be renewed

There are 2 system emails that can optionally be sent to subscription holders when their subscription enters a status of **Active (Renewable)**.

The **Renewal reminder email** will go to those contacts whose subscription is paid for by a non-recurring payment method e.g. Credit/Debit card or bank transfer. This email will include a link they need to click, which will then take them through the renewals process.

The **Renewal notification email** will only go to those contacts whose subscription is paid for by a recurring payment method, in other words a direct debit using GoCardless. This email will just let the contact know that their subscription will automatically renew on a certain date, and will not require the contact to do anything.

The email content for these emails can be edited via the systems email section in Email Centre

Setting up additional renewal reminder emails

Apart from the initial system emails that can optionally be sent out when a subscription enters the renewal state, no other emails get sent out during renewal.

You can setup *Email Centre* to send out any other emails you need to remind contacts who still haven't renewed, and using this method allows you to ramp up the messaging as contacts approach their subscription reaching their end date or before it expires.

1. Create a Rule that identifies those contacts whose subscription is in a particular status or has X number of days before it ends
2. Create a newsletter and use the **Renewal widget** in the email content, to give the contacts a strong call to action
3. Add a filter to only send to those people identified in the rule you created
4. Set the newsletter to send daily at a specific time

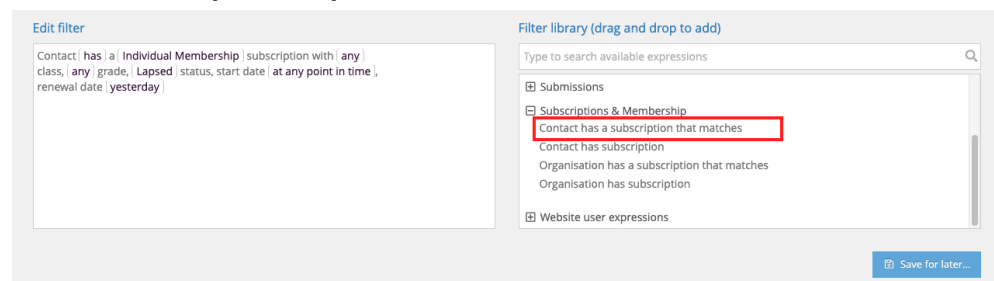
We'll walk through an example of setting one up.

Sending an email to contacts whose subscription has just lapsed

In this example, we are implementing a rolling membership, which means that the renewal date is based on when they joined rather than a fixed date in the year. Therefore we will possibly have different contacts who we need to target all year round.

We will setup an email which will get sent to contacts whose subscription has just gone past their end date. We will remind these contacts that they can still renew their membership, but they need to be quick about it.

1. **Setup a rule to identify those contacts.**
 - a. Go to the CRM Contacts listing screen
 - b. Create an advanced filter using the *Contact has subscription that matches* expression
 - c. Select any particular grades/classes but choose **Lapsed** as the *status* and a *renewal date of yesterday*



- d. Click the *Save for later ...* button and name it accordingly
2. **Create a newsletter and use the Renewal widget in the email content**
 - a. In Email Centre/Email and Newsletters, create a new email
 - b. Select a blueprint that will target CRM contacts and complete basic email fields

- c. On the **Edit** tab, insert the **Subscription renewal & alerts** widget and add any additional copy

The screenshot shows the 'Content' tab of an email editor. At the top, there are tabs for 'Preview', 'Edit', 'Settings', 'Customize layout', 'Statistics', and 'Send log'. The 'Edit' tab is active. Below the tabs, the 'Content' section is visible. It includes a 'Subject' field with the text 'Your subscription has lapsed', a 'Preview text' field with the text 'Optional text that email clients may display in inbox. e.g. "Free voucher worth over £100 inside..."', and an 'HTML Body' editor. The HTML Body editor has a rich text toolbar with options like Source, Bold, Italic, Underline, Strikethrough, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, and a 'Format' dropdown. The body content includes a paragraph of placeholder text: 'Aliquam sollicitudin neque eu ornare commodo. Suspendisse at lacus odio. Curabitur eget dignissim metus. Vestibulum vulputate porttitor tincidunt. Nunc ut sapien turpis.' Below this is a 'Subscription renewal & alerts' widget, which is a grey box with a pencil icon and the text 'Subscription renewal & alerts'. Below the widget is another paragraph of placeholder text: 'Etiam semper augue eu erat tempus cursus. Ut consectetur sagittis erat, ac mattis ante vestibulum finibus. Proin quis metus sed mi auctor egestas.'

3. Add a filter to only send to those people identified

- a. On the **Settings** tab, select the **Recipient filter** you created in the previous step

The screenshot shows the 'Recipient filter' settings in the 'Settings' tab. At the top, there is a blue box with instructions: 'Use the fields below to **limit the recipients of this email**. Where possible, it is advisable to use **Marketing lists** as these enable easy and precise **email unsubscribe** features. Use the **Recipient filter** to fine tune your recipients by custom rules. **Ignore contact preferences** should only be used for transactional emails.' Below this, there is a 'Marketing lists' field with a search bar 'Type to search Marketing lists'. Below that is a 'Recipient filter' field with a dropdown menu showing 'Members whose subscriptions lapsed yesterday'. To the right of the dropdown is a plus sign icon. At the bottom, there is an 'Ignore contact preferences' checkbox, which is currently checked.

4. Set the newsletter to send daily at a specific time

- a. On the **Settings** tab, for the *sending method*, choose **Scheduled**
- b. For the *Sending schedule*, select **Repeated**, and setup to run once a day and specify the time by entering into the *Scheduled start date* field
- c. For the *Sending limits*, although this email is sent every day and to only those people who went into Lapsed yesterday, they shouldn't qualify again, but for

added safety, selected **Limited** and *Not more than once, every month*

Sending method

- ☐ **Triggered as part of custom workflows**
The email template will only be sent as a result of a trigger in a custom workflow. For example, the result of a form builder form submission.
- ☐ **Manual**
The email will be sent to the recipients when you manually enter the send process
- ☒ **Scheduled**
The email will be automatically sent to the recipients at the time(s) you specify

Sending schedule

- ☐ **Fixed date and time**
Send once on a fixed date and time
- ☒ **Repeated**
Regularly attempt a send out of the email on a configured schedule
- Hint: to control the time, or day of the week for repeated emails, use the *start date* field and set the time/day to your target day/time.

Every Day(s) ⌵

Scheduled start date 📅

Scheduled end date 📅

Sending limits

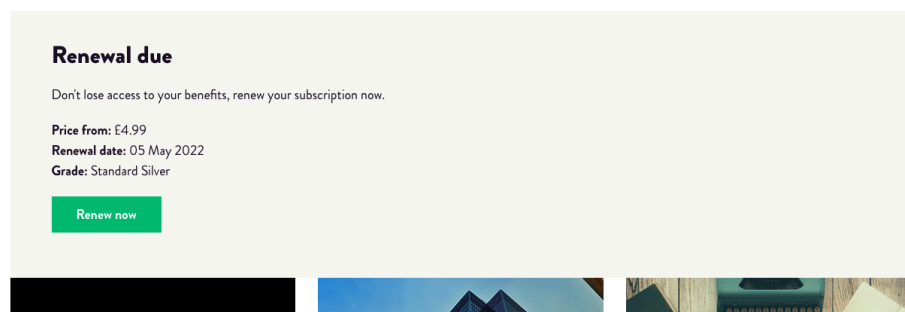
- ☐ **Unlimited**
The email can be sent an unlimited number of times to the recipient(s)
- ☐ **Once only**
The email will only be sent once to each recipient (ideal for newsletters, etc)
- ☒ **Limited**
Limited sending frequency; configure the elapsed time before an email can be sent again to a recipient

Restricted sending time

Not more than once, every Month(s) ⌵

Adding renewal calls to action on your website

Contacts may have multiple subscriptions and each one can have totally different configuration and renewal times, so the **Subscription renewal & alerts** widget can be used on both the website and in emails, to present a very clear and simple message to users when their subscription needs renewing, and how they go about it.



Once the **Subscription renewal & alerts** widget has been added into a page or email, it will only show when the user's subscription is in a state of Renewable or Lapsed, or if the user has a pending subscription which requires payment.

The widget comes with default copy, which will change depending on whether the subscription needs to be manually renewed or they pay via direct debit. You can easily override this content in the widget configuration.



If you are planning on adding this to multiple pages and need to change the default copy, then it might make sense to add the widget into the content library rather than directly into pages

Allowing members to switch grade on renewal

By default users will renew on their existing grade, and if they don't automatically renew, then during the renewal process they can choose a different payment plan. Administrators are able to configure a member's subscription so that when they renew it will be on a new grade, but previously there has been no way for users to make that choice themselves.

This can now be configured on a per grade basis:

1. In the admin, go to the subscription product you want to configure
2. On the **plans & pricing** tab, click on the pencil icon next to the grade you wish to change
3. The grade must be enabled in the grade picker, scroll down to the renewal options
4. Select from the appropriate **Renewal switch options**
 - a. If no users can switch to this grade on renewal, ensure that **none** is selected.
 - b. If anyone can renew onto this grade during renewal, then select **All**.
 - c. If only specific users can switch to this grade on renewal, then select **Custom filter** and select or create the condition in which they need to qualify for.

Renewal options

Optionally configure whether users can switch to this grade during renewal. NOTE: You can change the default copy shown during renewal by editing the Subscription renewal flow in the webflow configuration area.

Renewal switch option

- ☐ **None**
No one can switch to this grade on renewal
- ☐ **All**
Anyone can switch to this grade on renewal
- ☒ **Custom filter**
Only those matching a filter can switch to this grade on renewal

Subscription filter

Type to search Rules engine conditions and filters

Cancel Save changes

For example, if you have **student** and a **full member** grades, then you could add a condition on the **student** grade whereby the members graduation date must be in the future, and on the **full member** grade, whereby if the graduation date is set, then it must be in the past.

Renewal process for users who pay by a recurring payment method

As mentioned, users whose subscription is paid for by a recurring payment method like direct debit do not need to do anything under normal circumstances, and their subscription will automatically renew when it reaches its renewal date.

The way CRM handles this process behind the scenes is:

1. Subscription enters a state of **Active (Renewable)**
2. 4-days (configurable) before the subscription renewal date, CRM creates a renewal order for the subscription and sends a payment instruction to the payment provider
3. Depending on the individual payment provider, but usually they notify the user the payment is about to be taken and then sends the payment instruction to the users bank/card
4. CRM gets automatically notified once the payment has been taken by the payment provider, and the renewal order gets marked as **Paid** and the current subscription is extended by the duration set in the subscription plan and the status returns to **Active**



To identify those subscriptions which are paid by a recurring payment method like direct debit use a subscriptions filter that uses the ***Recurring auth is not empty*** expression

How can members change their payment plan if it automatically renews?

Members may wish to change their payment plan when it comes to renewal. Typically this could be to move from paying annually to paying monthly. However unless an administrator has changed the members subscription so that it renews on a new payment plan, it would ordinarily just renew on the same payment plan.

Where you have added the renewal widget onto a page, when a member who is in renewal and pays by a recurring payment goes to that page, and their grade supports additional payment plans, they'll see a call to action which allows them to choose a new payment plan.

Renewal due

Your Bronze subscription will automatically be renewed on 30 June 2024 for a further 12 months, and you will be charged £120.00.

You can manage your subscription, and potentially change your grade and the duration and frequency of payments by clicking on the Change my plan button.

Price from: £120.00

Renewal date: 30 June 2024

Grade: Standard Bronze

[Change my plan](#)

Selecting a new plan won't mean the member will be charged at that point, they will still only be charged on their renewal date.

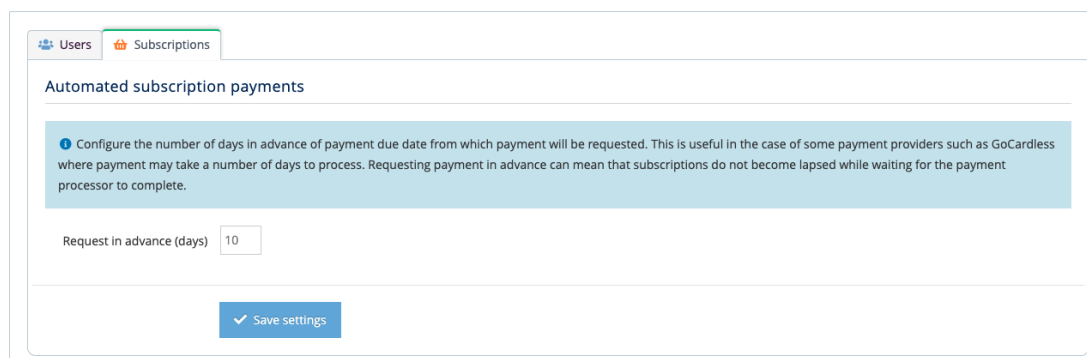
Changing when the instruction is sent to the payment provider to take payment and renew a subscription

By default CRM will send the instruction to the payment provider 4-days before the subscriptions renewal date to take payment. In the case of GoCardless direct debit, this is usually sufficient time to inform the user of a pending payment and arrange for payment from their bank account, however this can be changed if required.

1. Under the configuration menu (spanner), select the **Settings** item and then **Pixl8 CRM**
2. Change the field called *Request in advance (days)* and Save.

[Home](#) > [System settings](#) > [Pixl8 CRM](#)

 **Edit Pixl8 CRM settings** » Settings related to the Pixl8 CRM system



The screenshot shows the 'Edit Pixl8 CRM settings' page. At the top, there are two tabs: 'Users' and 'Subscriptions', with 'Subscriptions' being the active tab. Below the tabs, the section is titled 'Automated subscription payments'. A light blue informational box contains the following text: 'Configure the number of days in advance of payment due date from which payment will be requested. This is useful in the case of some payment providers such as GoCardless where payment may take a number of days to process. Requesting payment in advance can mean that subscriptions do not become lapsed while waiting for the payment processor to complete.' Below this box, there is a label 'Request in advance (days)' followed by a text input field containing the value '10'. At the bottom of the form, there is a blue button with a checkmark icon and the text 'Save settings'.

What happens if a members recurring payment fails?

Direct debits and other recurring payment methods can fail for a number of reasons, the main one being a funds issue. The payment provider will typically have ways on how it then handles that scenario, whether the payment request is permanent e.g. the bank account is no longer active or whether it might be temporary e.g. insufficient funds, so it might be possible to retry the payment.

If you use GoCardless to handle your direct debit payments, then refer to our separate GoCardless user manual on how you setup automatic retries using Success+

Handling a permanent direct debit failure

1. CRM gets notified by the payment provider that a payment has failed and it will not retry
2. CRM logs the failed payment against the users subscription and renewal order
3. The users subscription payment method is changed to **Manual** and their mandate and continuous authorisation is cancelled in CRM
4. The user is sent the system email *Subscription auto renewal permanent failure notification email* which includes a link to renew

5. The user can then:
 - a. Click on the link on the email and then follows the standard renewal process
 - b. Click on the link now shown on the renewal widget and then follows the standard renewal process
 - c. Or the user goes to the **My Subscription** area and selects the option to setup a new direct debit mandate

Handling a temporary direct debit failure

1. CRM gets notified by the payment provider that a payment has failed but it will retry
2. CRM logs the failed payment against the users subscription and renewal order
3. The user is sent the system email *Subscription auto renewal temporary failure notification email* which explains that a retry will occur and details of the payment issue. It is unable though to say any details of when it will retry next
4. This process will repeat until the payment provider decides that it won't try again, and then the process outlined in Handling a permanent direct debit failure will run.

What happens if a user cancels their direct debit directly with the provider?

If the user cancels their direct debit mandate directly with the payment provider, or if an administrator cancels the direct debit within the payment provider interface, then CRM will be notified, and will cancel the direct debit mandate in the system, putting the payment method into a **Manual** state.

This will mean that the user will need to go through the standard renewal process and will receive the system email (if turned on) to click a link to renew and will see the renewal link on the renew widget.

The user can also cancel their direct debit mandate via the My Subscriptions area, and if they contact a CRM administrator directly who can cancel the mandate as well (see the section on *day to day operations*)

Renewal process for users who do not have a recurring payment method

Renewals for those users who do not pay via a recurring method, in other words Direct Debit, are required to step through a renewal process that will ask them to select a Subscription plan and then choose their payment method.

When the user has a subscription in the **Active (Renewable)** or **Lapsed** state, then they will be able to renew, however no order is created in advance of renewal.

If configured, a user might be able to switch grades as part of this process, and if an administrator has configured the members subscription to switch grade, then all of the prices and other messaging will apply to the grade they are switching to..

Allowing users to select a subscription plan, gives them an opportunity to review and change to a different duration or to pay via instalments depending on what subscription plans have been setup and are active for the grade they are renewing as.

What is the process for a user to renew via the website?

The renewals process can be customised to a specific requirement by Pixl8, so the following flow will show how the default process works.

1. **Begin renewals** - User starts the renewal process by clicking on a link from the Renewals widget on a page or in an email or from receiving the system email to renew
2. **Select Subscription plan** - If there is more than one **Active** subscription plan for the grade the user is renewing, then they need to select their Subscription Plan but their current plan will be preselected. **NOTE:** at this point an order will be created as we now know what plan they are looking at purchasing, and if they select a different plan, then the order is cancelled and another created.
3. **Enter Address** - confirm or enter your billing address
4. **Choose payment method** - If there is more than one payment option for the selected plan, then they'll select the payment method
5. **Confirm payment**



If they have paid by an offline method such as BACS/Bank transfer then we treat it the same way as an instant payment and assume payment will be made, and we update their subscription and change the renewal date.

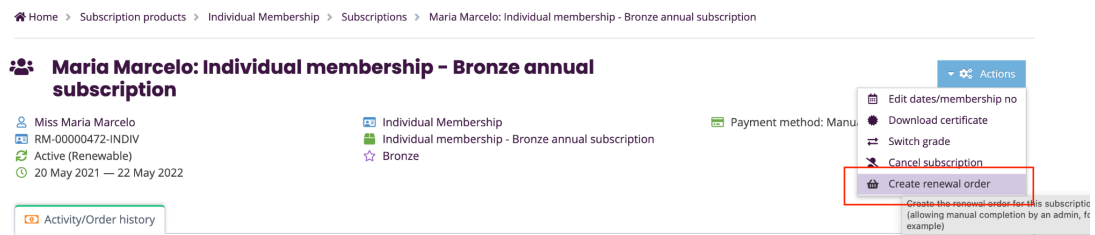
If they have setup a new direct debit, then their subscription renewal date will be changed once the payment is confirmed

How does a user renew without logging into the website?

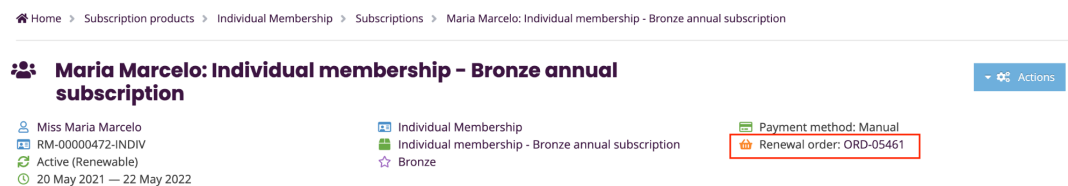
There may be instances where your members do not login to the website and wish to renew over the phone, or you simply want to create a pro-forma invoice to send to an organisation's finance department to pay.

You can achieve this through the subscription admin

1. Find the subscription you wish to renew either via the Contact/Organisation CRM record or directly via the subscriptions page
2. Via the **actions** menu, select **Create Renewal Order**



3. Confirm you actions



The order created will be for the same grade and subscription plan as specified but will take into account any upgrades on renewals, it will automatically pull in the previous billing address.



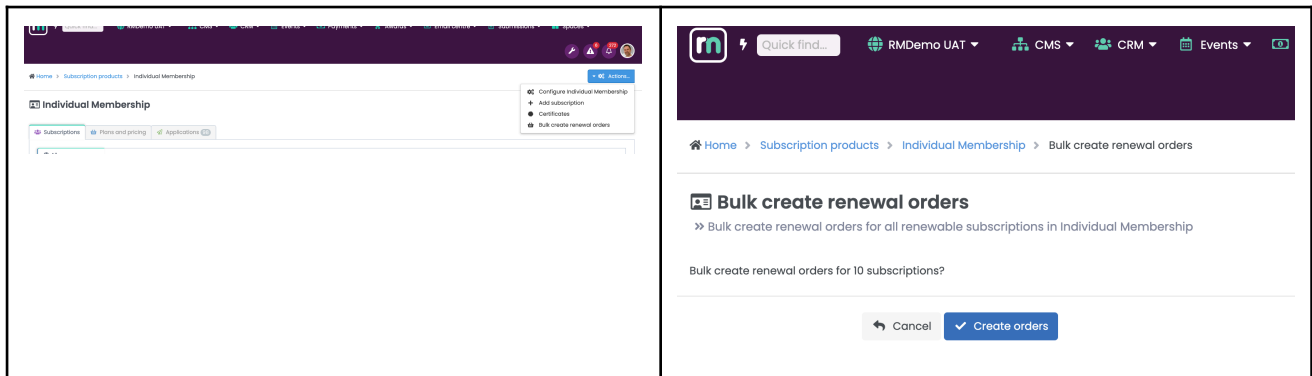
The subscription and renewal date won't be updated until the order has been marked as being paid.

Bulk issuing and sending renewal invoices

For some organisation membership, rather than members initiating the renewal process, renewal is assumed. For this administrators can create all of the renewal orders and send them to the relevant staff member to pay.

It is vital that before renewal invoices are created that all of the membership subscriptions are checked to ensure they are on the correct grade and pricing plan, and that any prices have been updated correctly.

Due to this, and the implications of producing invoices if they are incorrect, we do not turn on this functionality by default. If you feel that you need this ability, and are comfortable with how it works and the prerequisites, then contact your CSM who can enable the feature for you.



Once you have the feature enabled, then follow these instructions for creating the renewal orders

1. On the appropriate subscription product, from the **Actions** button, select **Bulk create renewal orders**
2. This will give you a summary of how many renewal orders this will create. It will create them for all subscriptions with a status of **Active (renewable)** who do not already have a renewal order.
3. Click on the button **Create Orders**

To email the orders or invoices, full details are provided in the finance user guide, however to summarise.

1. Go to the Orders screen
2. Create a filter to find all orders created today for subscription renewal
3. Bulk select them
4. Under the **Batch Actions** button at the bottom of the screen, click **Send payment reminder email**
5. Enter any custom copy, select whether you want them to be sent as well to the finance contacts and click Send

You can also set up a payment reminder which will automatically send these based on a schedule,

Approving membership renewals

Ordinarily the decision of renewing membership is down to the member, however there are plenty of cases whereby you might need to check things before you allow a member to renew on their current grade. For example, does the member still qualify for the student or concessionary grade or for an organisational subscription, is the company's turnover still within a certain range?

You can configure this behaviour on a pricing plan and/or package level for each subscription product. So using the student grade example, if this was the only grade you wanted to check before a member could renew, then you would configure this for all of the

subscription grade packages across your pricing plans. However if you wanted to check that all organisations were still within their turnover ranges, then you would configure this across each of the pricing plans.

The screenshot shows a web interface for managing renewals. At the top, there are five tabs: 'Key Information', 'Automated Renewals' (which is active), 'Fixed Renewal dates', 'Subscription plan picker', and 'Accounting'. Below the tabs, the title 'Manage renewals' is displayed. A toggle switch for 'Manage renewals?' is turned on. Under 'Renewal type', there are three radio button options: 1. 'Subscriptions can automatically be renewed' (selected), with the description 'Users can renew their subscriptions as soon as it becomes eligible.' 2. 'Subscriptions conditionally need to be confirmed before renewal', with the description 'An administrator will need to confirm certain subscriptions before they can be renewed.' 3. 'All subscriptions need to be confirmed before renewal', with the description 'An administrator will need to confirm all subscriptions before they can be renewed.' Below these options, a blue information box states: 'Only subscriptions that meet this filter need to be checked by an administrator before they can be renewed.' At the bottom, there is a 'Renewal filter' section with a dropdown menu currently showing 'Active (Subscription)' and a plus icon to add more filters.

Where you do need to collect evidence before a member can renew, due to the variation of what might be needed, this isn't handled automatically by the system. If this is needed, then you could use a formbuilder form, have an entirely separate manual way of doing it, or speak to your customer success manager about a customisation to manage this process.

There are three configuration options for subscription renewal approval:

1. **Subscriptions can automatically be renewed** - Allow members to renew without any approval, this is the default option
2. **Subscriptions conditionally need to be confirmed before renewal** - Most members can automatically renew, and only those that fall into a specific condition need to be approved. *For example*, this could be those on a student grade whose graduation date is in the past
3. **All subscriptions need to be confirmed before renewal** - No one can renew their subscription until it has been approved. *For example*, you need to check the turnover organisations for all corporate subscriptions

Renewal approval subscription status changes

When renewal approval is turned off, the standard subscription status's follow this pattern:

Active → Active (renewable)

With subscription approval, the status's change a little:

Active (Pending renewal approval) → Active (Renewable)

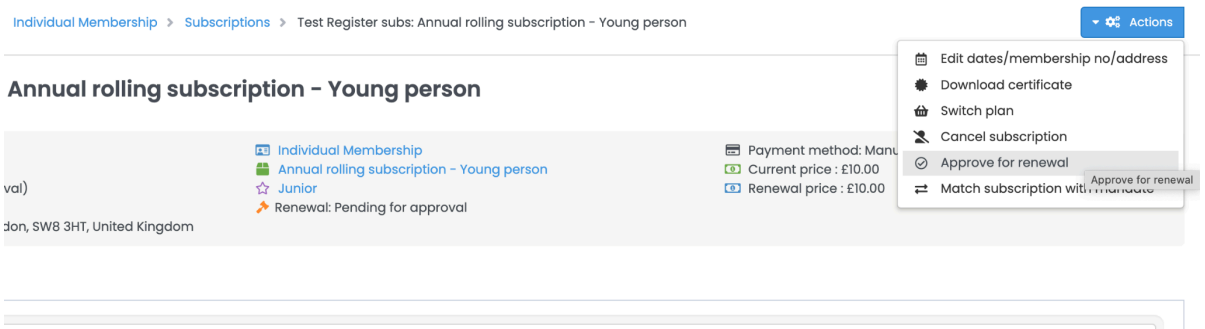
Approving a subscription for renewal

If you have subscriptions that need to be approved, then the subscription will not become renewable until an administrator has approved it. This means that members won't be able to

renew or see any information regarding renewal, and administrators will not be able to raise a renewal order until such time.

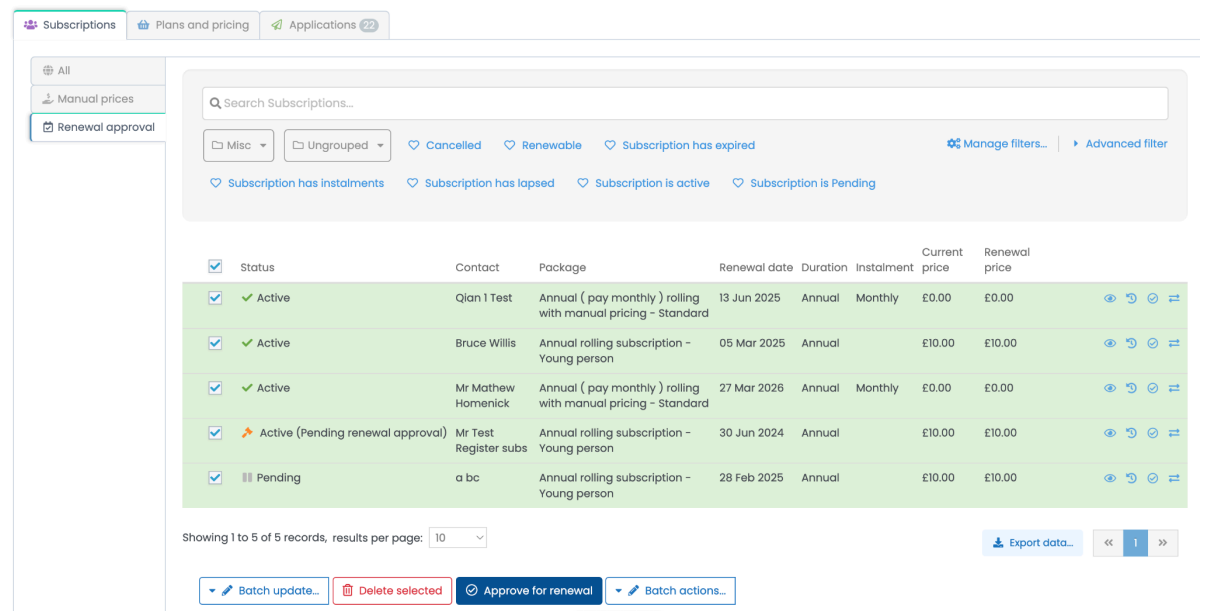
If a subscription remains unapproved, then it will continue to transition from Active to Lapsed to Expired if no action is taken.

To approve a single subscription for renewal



- 1. View a subscription in the admin
- 2. Under the Actions button menu, click on the option marked **Approve for renewal**
- 3. Confirm your choice

To approve subscriptions for renewal in bulk



- 1. View the subscription product and click on the **Renewal approval** left-hand tab
- 2. Select all of the subscriptions you want to renew
- 3. Click on the button marked **Approve for renewal**

4. Confirm your choice

Note that although you can bulk select any number of subscriptions in various status's and click on the **Approve for renewal**, only those that are eligible will be approved

To unapprove a subscription for renewal

If you mistakenly approve a subscription or just want to revert it, then you can do this individually or in bulk by following the same steps as approving, but you will instead see an option to unapprove the subscription.

Day to day user subscription management

Once the subscription product has been configured correctly, and the join online process is creating the majority of subscriptions for your members, day to day management should be down to a minimum, however there will be some occasions where you will need to step in.

Manually creating a subscription for a user

Subscriptions are usually created as part of a join online or application process, however they can also be created by administrators.

Picking the subscription for a contact or organisation

Home > Contacts > Miss Kelly Hu

Miss Kelly Hu » Contact has no associated organisation

Contact kelly.hu@test.com

Active
Last logged in: 10 months ago

Created 10 months ago by system
Updated 3 weeks ago by system
new tag, Example tag

Login options Impersonate Edit Delete

Dashboard Personal info Subscriptions Orders Event bookings Groups ...

<input type="checkbox"/>	Status	Product/Service	Package	Current grade	Renewal grade	Start date	Renewal date	
<input type="checkbox"/>	Cancelled	Individual Membership	Individual membership - Bronze annual subscription	Bronze		16 Mar 2021	16 Mar 2021	👁️ 🔗

Showing 1 to 1 of 1 records, results per page: 10

Export data...

Add subscription

Home > Contacts > Miss Kelly Hu

Miss Kelly Hu » Contact has no associated organisation

Contact kelly.hu@test.com

Active
Last logged in: 10 months ago

Created 10 months ago by system
Updated 3 weeks ago by system
new tag, Example tag

Login options Impersonate Edit Delete

Dashboard Personal info Subscriptions Orders Event bookings Groups ...

<input type="checkbox"/>	Status	Product/Service	Package	Current grade	Renewal grade	Start date	Renewal date	
<input type="checkbox"/>	Cancelled	Individual Membership	Individual membership - Bronze annual subscription	Bronze		16 Mar 2021	16 Mar 2021	👁️ 🔗

Showing 1 to 1 of 1 records, results per page: 10

Export data...

Add subscription

- Create Individual Membership ...
- Create Custom Subscription ...

1. Go into the particular subscription product you want to create, or go to the subscriptions tab for a contact or organisation, and click on the **Add subscription** button
2. Complete the subscription form. **Note** the system will prevent you creating a subscription if there is already an **Active** subscription for the particular subscription product

Home > Subscription products > Individual Membership > Subscriptions > Add Subscription

+ Add Subscription

Key information

Contact * Miss Kelly Hu x +

Class * Type to search Subscription classes

Grade * Type to search Subscription grades

Package * Type to search Subscription packages

Cancel Add Subscription

- a. **Contact** - this will default to the CRM contact or organisation if you accessed it via that route, or you will need to select from the available contacts/organisations
 - b. **Class** - when you select a class the grade picker will be limited to show only the grades for the selected class
 - c. **Grade** - when you select a grade the package picker will be limited to show only the packages for the selected grade
 - d. **Package** - this is essential which subscription plan for the selected grade
 - e. Click **Add subscription** to go to the next step
3. You'll then be asked if and how the subscription is being paid for.

Creating a subscription where the applicant can choose a subscription plan

If the applicant would like to go through the remainder of the subscription process and pick a subscription plan and choose how to pay for it, then select this option. Creating a subscription here does not commit the applicant to the subscription, and creates a subscription in a pending state, which only becomes active and sets the start date once the payment process has been completed.

1. Follow the steps for *Picking the subscription for a contact or organisation*
2. On the third step choose *The applicant needs to make a payment in order to activate the subscription. The applicant will be sent an email with directions to pay.*
3. On the final step enter a custom message if required which will be added to the email the applicant will be sent
4. On confirmation, the system email *Subscription payment request* is sent to the application and a subscription with a status of **Pending** is created
5. The applicant then needs to click on the link in the email, where they follow the payment process by selecting their subscription plan, and choosing a payment method depending on the options defined for that plan.
6. Once the payment process has been completed, the subscription changes to **Active** and the renewal date is set

Creating a subscription where the applicant just needs an invoice in order to pay

If the applicant has joined over the phone or has no intention of logging into the website in order to complete payment for their subscription, and instead will just make a bank transfer payment or similar, then select this option.

1. Follow the steps for *Picking the subscription for a contact or organisation*
2. On the third step choose *The applicant has agreed to make a payment in order to activate the subscription, however only an order needs to be generated at the moment.*

- This will create a subscription with a status of **Pending** and also an order with the price on the subscription plan you selected

Home > Subscription products > Individual Membership > Subscriptions > Training Submitter: Annual one-off payment - Bronze

Training Submitter: Annual one-off payment - Bronze

Training Submitter
RM-00000785-INDIV
Pending
4 Apr 2022 — 4 Apr 2023

Individual Membership
Annual one-off payment - Bronze
Bronze

Payment method: Manual

Activity/Order history

Search Subscription activity...

No filters have been created for this view. Use the advanced filter and hit the "Save for later" button to save filters that can be shared with your team.

Type	Date	Detail	Order
+ Subscription creation	04 Apr 2022 05:17:45 PM		Created

Showing 1 to 1 of 1 records, results per page: 10

Export data...

- The order is then viewable by the applicant in their invoice history page when they login, and they could optionally pay for it there. However if they have already paid it, then you can just click on the order shown in the **Activity/Order history** and then under the corresponding **Actions** menu select **Record Payment**

Home > Orders > ORD-05071

ORD-05071

Created
Subscription join/renewal
Training Submitter

Pending payment
£120.00 remaining

Created 7 minutes ago
Updated 7 minutes ago

Order details Invoices Payments Pro-Forma

Summary

Actions

- Delete
- Edit
- Request payment
- Record payment**
- Download pro-forma

- Once you have added the payment details, it will then update the status of the subscription to **Active**

Creating a subscription where no payment will be required

- Follow the steps for *Picking the subscription for a contact or organisation*
- On the third step choose *I will waive the subscription fee for this applicant and the subscription will be immediately activated.*
- The next step will allow you to change the start and end date of subscription. By default the subscription will start today and end based on the duration of the subscription package you initially selected.
- Confirm the creation, and an active subscription for that participant will be created. As they approach their end date, the contact will then require to renew via the regular renewal process.

How to delete a pending subscription

You've created a subscription which is in a state of *Pending* either manually or it was created as part of the applications process, and the applicant hasn't completed the payment process for it, so you need to remove it.

1. Find the subscription you want to delete, either via the Subscriptions tab on their CRM Contact or Organisation record or directly from the subscriptions grid



2. Under the Actions menu, select the Delete subscriptions option and confirm you wish to delete it.

Pausing & resuming a subscription

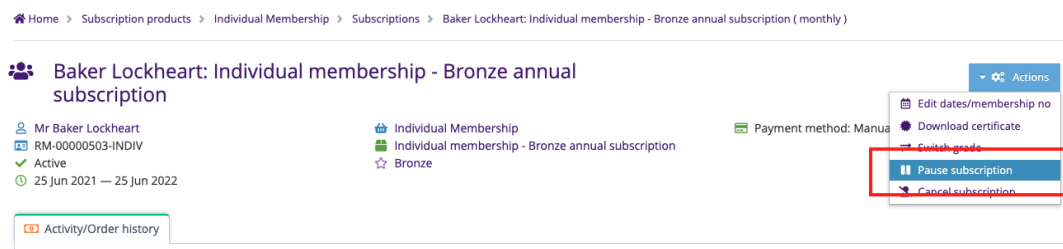
There are instances where you may wish to pause a members subscription. Perhaps during a break in professional work such as maternity or paternity leave, long term sickness or being furloughed during covid times.

While a subscription is paused, their renewal and any payment dates are on hold until the subscription is reactivated, and for rolling subscriptions, on activation then length of time the subscription was paused for is added to the renewal and any payment dates.

You can identify these subscriptions by filtering where the subscription status has a value of Paused, whether during this state you disable access rights or other member rights ultimately comes down to you.

Pausing a rolling renewal date subscription

1. Find the subscription you wish to Pause either via the Contact/Organisation CRM record or directly via the subscriptions page
2. Via the **actions** menu, select **Pause subscription**



3. Pausing by default will begin immediately for one month, to change

⚠ When the subscription is resumed, the renewal date of the subscription will extended by the length the subscription was paused for.

Pause from * 2024-06-18

Duration * 1





Unit * Month(s)




Send pause email ☒

- Start date** - this can be any date in the future
 - Duration** - this number of units e.g. 3 Months etc
 - Unit** - the block of time which can be days, weeks, months or years
 - The member can optionally be sent an email notifying them on this, for reference the system email is called **Subscription paused confirmation**
 - Click **Pause subscription** to confirm your choice
4. Returning to the subscription detail page, if you have selected Pause to start immediately, you'll see when it is due to resume and also the Renewal Date of the subscription will have been increased to include the Pause duration set

[Home](#) > [Subscription products](#) > [Individual Membership](#) > [Subscriptions](#) > [Baker Lockheart](#)






Baker Lockheart: Individual membership - Bronze a subscription




 Mr Baker Lockheart
 RM-00000503-INDIV
 Paused until 11 Mar 2022
 25 Jun 2021 — 23 Jul 2022

 Individual Membership
 Individual membership monthly)
 Bronze

if you have specified the subscription Pause to start in the future, then the detail page details when the Pause period will begin

Baker Lockheart: Individual membership - Bronze subscription

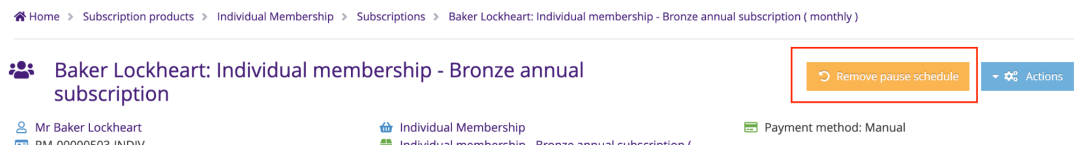
 Mr Baker Lockheart
 RM-00000503-INDIV
 Active
 Paused scheduled 01 Mar 2022 - 01 Apr 2022
 25 Jun 2021 — 26 Jul 2022

 Individual Mem
 Individual mem monthly)
 Bronze

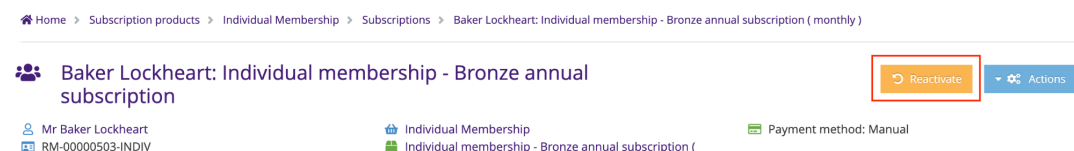
Resuming a paused rolling renewal date subscription

Subscriptions will automatically resume once the Paused period has lapsed, however you can force a subscription to resume.

1. Find the subscription you wish to **resume** either via the Contact/Organisation CRM record or directly via the subscriptions page
2. If the subscription Pause is set to happen **in the future** you simply click on the button marked Remove Pause schedule, and confirm your decision

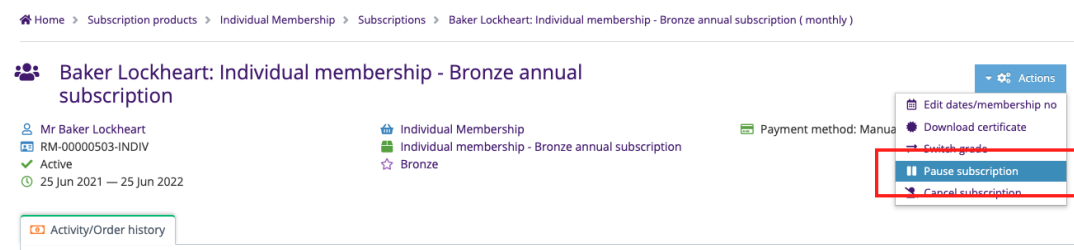


3. If the subscription is **currently Paused** and you wish to end it immediately, then you'll see a button marked Reactivate. Simply click and confirm and the subscription will be returned to a state of Active. **Note:** The subscription renewal and any payment dates will be immediately recalculated, based on the number of days the subscription was actually Paused for.



Pausing a fixed renewal date subscription


1. Find the subscription you wish to Pause either via the Contact/Organisation CRM record or directly via the subscriptions page
2. Via the **actions** menu, select **Pause subscription**



3. It will default for the subscription to pause immediately, but you can change the date to be in the future. The member can optionally be sent an email notifying them on this, for reference the system email is called **Subscription paused confirmation**

Pause subscription

» Jane Smith qa: Fixed annual plan – end March – Gold

 You are pausing a subscription which has a fixed renewal date. When the subscription is resu

Pause from * 2024-06-18

Send pause email ☒

 Back


» Pause subscription

Resuming a fixed renewal date subscription




Resuming a paused subscription which has a fixed renewal date is a lot simpler, simply click on the Reactivate button when you view the subscription in the admin




» Subscriptions » Jane Smith qa: Fixed annual plan – end March – Gold

 Reactivate

 Actions

– end March – Gold

 Individual Membership
 Fixed annual plan – end March – Gold
 Gold

 Payment method: Stripe
 Current price : £400.00
 Renewal price : £400.00

Note that, unlike the rolling subscription which can optionally add the number of days the subscription was paused for to the renewal date, with a fixed renewal date, it simply changes the status back to Active

Cancelling or deciding not to renew a subscription

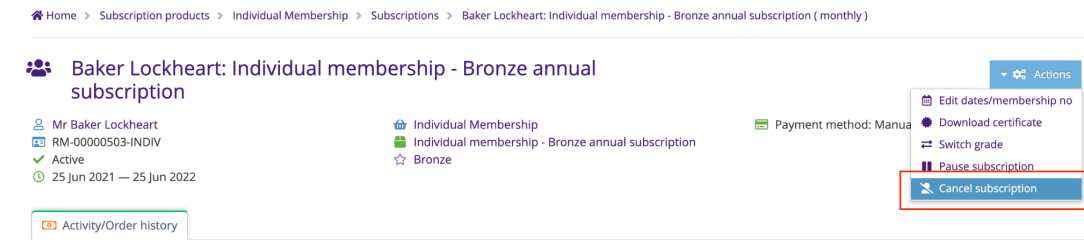
Administrators can cancel subscriptions with immediate effect or set them to be cancelled on their renewal date. When you cancel a subscription, it does not handle any financial implications such as issuing refunds against the original payment method or credit notes.

Only subscriptions with a status of **Active** and **Lapsed** can be cancelled.

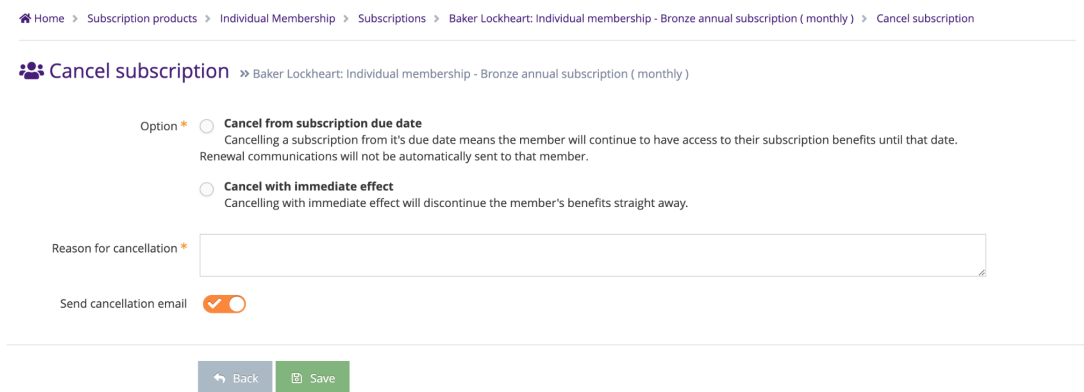
To cancel a subscription

NOTE: It is important to be aware that it is currently not possible to reactivate a cancelled subscription.

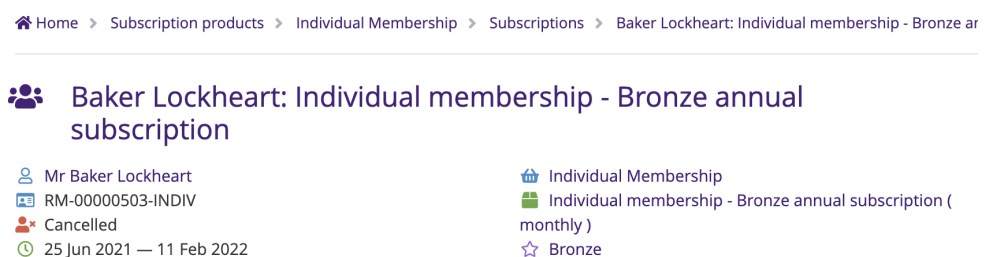
1. Find the subscription you wish to **Cancel** either via the Contact/Organisation CRM record or directly via the subscriptions page
2. Via the **actions** menu, select **Cancel subscription**



3. On the subsequent cancel screen










- a. **Option** - You can choose whether to cancel from their subscription due date (Renewal Date) or immediately
- b. **Reason for cancellation** - this is only ever displayed internally, both on their CRM activity record and on the activity history for the subscription
- c. **Send cancellation email** - Keep this enabled to send the subscription holder an email letting them know of the cancellation. This is a system email, and depending on cancel option, it will either send the one called **Subscription Immediate Cancellation** or **Subscription Renewal cancellation**
- d. Confirm your choice
- e. If you have chosen to **cancel the subscription immediately**, then back on the subscription detail page you'll see the new subscription status, and an end date of the subscription of today's date



- f. If you have chosen to **cancel the subscription on the subscription due date**, then the subscription remains as **active** but with a new sub-status of **Not Renewing**, and the end date of the subscription remains unchanged. When the end date of the subscription is reached, then the subscription will automatically be updated to a status of **Cancelled**.

Tommy Adore: Individual membership - Bronze annual subscription

 Mr Tommy Adore
 RM-00000419-INDIV
 Active (Not renewing)
 2 Apr 2021 — 2 Apr 2022

 Individual Membership
 Individual membership - I
monthly)
 Bronze

Changing the grade of an active subscription

Administrators can switch an **active** or **lapsed** subscription grade with immediate effect or set up so that the switch occurs when the user renews their subscription.

An important point to note is that you are only able to switch grades within its **current subscription plan**. So in the example below, if someone has a biannual subscription, when you grade switch them, you will only be able to switch grades to one which is active and has a price within the biannual subscription plan.

	Annual (monthly schedule)	Annual direct debit	Bi-annual
→ Bronze	Individual membership - Bronze annual subscription £3.99 (excluding VAT @ 20%) Active	Individual membership - monthly direct debit £29.99 (excluding VAT @ 20%) Active	Individual membership - Bronze bi-annual subscription £20.00 (including VAT @ 20%) Active
→ Silver	Individual membership - Silver annual subscription £4.99 (including VAT @ 20%) Active	Individual membership - Silver annual subscription ... £39.99 (including VAT @ 20%) Active	Individual membership - Silver bi-annual subscription £25.00 (including VAT @ 20%) Active
→ Gold	Individual membership - Gold annual subscription £10.99 (including VAT @ 20%) Active	Individual membership - Gold annual subscription ... £89.99 (including VAT @ 20%) Active	Individual membership - Gold bi-annual subscription £50.00 (including VAT @ 20%) Active
→ Free	Price not yet set. + Set price	Price not yet set. + Set price	Price not yet set. + Set price
→ Platinum	Platinum £100.00 (including Zero rated @ 0%) Active	Price not yet set. + Set price	Platinum bi-annually £133.00 (excluding VAT @ 20%) Active

Switch grade » Mario Lopez: Individual membership - Bronze bi-annual subscription

Choose from the packages below to switch the customer's subscription grade. Any displayed costs 2022). You are able to make adjustments to any fees in the next step.

Switch Time

☒ **Switch Now**
Switch now and optionally charge a fee

☐ **Switch on Renewal**
Choose the grade to switch to when the client renews

Bi-annual

☒ Individual membership - Bronze bi-annual subscription (current package)
This is the customer's currently selected package.

☐ Individual membership - Silver bi-annual subscription
Suggested upgrade fee: **£1.92 (including VAT @ 20%)**

☐ Individual membership - Gold bi-annual subscription
Suggested upgrade fee: **£11.54 (including VAT @ 20%)**

☐ Platinum bi-annually
Suggested upgrade fee: **£44.74 (excluding VAT @ 20%)**

Cancel Next...

To make an immediate grade switch for a subscription

1. Find the subscription you wish to **grade switch** either via the Contact/Organisation CRM record or directly via the subscriptions page
2. Via the **actions** menu, select **Switch grade**

Home > Subscription products > Individual Membership > Subscriptions > Mario Lopez: Individual membership - Bronze bi-annual subscription

Mario Lopez: Individual membership - Bronze bi-annual subscription

Mr Mario Lopez
 3M4-0000068-INDIV
 Active
 27 Oct 2021 — 27 Apr 2022

Individual Membership
 Individual membership - Bronze bi-annual subscription
 Bronze


Payment method: Man...

Actions

- Edit dates/membership no
- Download certificate
- Switch grade**
- Pause/stop/stop
- Cancel subscription

Activity/Order history

3. On the subsequent screen

 **Switch grade** » Mario Lopez: Individual membership - Bronze bi-annual subscription

Choose from the packages below to switch the customer's subscription grade. Any displayed costs are an estimate based on a pro rate calculation using the subscription end date (27 Apr 2022). You are able to make adjustments to any fees in the next step.

Switch Time

☒ **Switch Now**
Switch now and optionally charge a fee

☐ **Switch on Renewal**
Choose the grade to switch to when the client renews

Bi-annual

☐ Individual membership - Bronze bi-annual subscription (current package)
This is the customer's currently selected package.

☐ Individual membership - Silver bi-annual subscription
Suggested upgrade fee: **£1.92 (including VAT @ 20%)**

☐ Individual membership - Gold bi-annual subscription
Suggested upgrade fee: **£11.54 (including VAT @ 20%)**

☐ Platinum bi-annually
Suggested upgrade fee: **£44.74 (excluding VAT @ 20%)**

- a. **Switch Time** - Switch now is the default option
- b. **Grade pick** - You will see all of the available grades for the subscriptions current plan. The current grade is visible but not selectable, and for each grade there is a **suggested price** which is based on the price difference between their current grade and the new one, and adjusted pro-rata ratio of days remaining versus the length of the plan.
- c. Select **Next** once a choice has been made
4. On the next screen you are asked whether you want to **Charge or waive the fee**.
 - a. If you are **waiving the fee**, then you just need to confirm this decision and the grade switch is complete and a system email (*Subscription grade switch confirmation*) is sent to the subscription owner to confirm the grade switch
 - b. If you are **charging for the grade switch** then the price shown on the previous step will be displayed which can be modified.
5. (these steps only apply if charging for a switch) The subscription owner is sent a system email (*Subscription grade switch payment*) which includes a link for them to pay for their grade switch, and irrespective of the payment method they currently use, only payment methods defined as one-off payment methods can be used
6. When the payment is completed, then the grade switch is made and the subscription returns to a status of **Active**
7. If the payment hasn't been received within a period of 7-days from the date of switch, then the grade switch is cancelled, and the subscription returns to a status of **Active**

To make grade switch on renewal for a subscription

1. Find the subscription you wish to **grade switch** either via the Contact/Organisation CRM record or directly via the subscriptions page
2. Via the **actions** menu, select **Switch grade**

3. On the subsequent screen

Switch grade » Asma Lopez: Individual membership - Silver bi-annual subscription

Choose from the packages below to switch the customer's subscription grade. Any displayed costs are an estimate based on a pro rate calculation using the subscription end date (27 Apr 2022). You are able to make adjustments to any fees in the next step.

Switch Time

☐ **Switch Now**
Switch now and optionally charge a fee

☒ **Switch on Renewal**
Choose the grade to switch to when the client renews

Bi-annual

☐ **Individual membership - Bronze bi-annual subscription**
This package is less expensive than the current package. You are able to downgrade the customer to this package, however we do not currently process refunds.

☒ **Individual membership - Silver bi-annual subscription (current package)**
This is the customer's currently selected package.

☐ **Individual membership - Gold bi-annual subscription**

☐ **Platinum bi-annually**

[Cancel](#) [Next...](#)

- Select **Switch on Renewal** for the Switch time
 - Select the new grade
 - Click the **Next** button
 - You will then be asked to confirm the grade switch, click **confirm switch**
4. Back on the subscription screen, you will see that the subscription remains on the current grade, but the renewal grade is indicated

Asma Lopez: Individual membership - Silver bi-annual subscription [Actions](#)

Miss Asma Lopez
RM-00000691-INDIV
Active
27 Oct 2021 — 27 Apr 2022

Individual Membership
Individual membership - Silver bi-annual subscription
Switched from: Individual membership - Bronze bi-annual subscription
Silver
Renewal grade: Platinum

Payment method: Manual

Activity/Order history

Cancelling a subscriptions grade switch on renewal

If you have switch a subscription so that it will renew at a different grade, but need to revert the decision for any reason

- Find the subscription you wish to **grade switch** either via the Contact/Organisation CRM record or directly via the subscriptions page
- Via the **actions** menu, select **Cancel renewal grade switch**

Home » Subscription products » Individual Membership » Subscriptions » Asma Lopez: Individual membership - Silver bi-annual subscription

Asma Lopez: Individual membership - Silver bi-annual subscription [Actions](#)

Miss Asma Lopez
RM-00000691-INDIV
Active
27 Oct 2021 — 27 Apr 2022

Individual Membership
Individual membership - Silver bi-annual subscription
Switched from: Individual membership - Bronze bi-annual subscription
Silver
Renewal grade: Platinum

Payment method: Manual

Activity/Order history

[Edit dates/membership no](#)
[Download certificate](#)
[Cancel renewal grade switch](#)
[Pause subscription](#)
[Cancel subscription](#)
[Cancel renewal](#)

3. Confirm your decision, and the renewal switch is removed

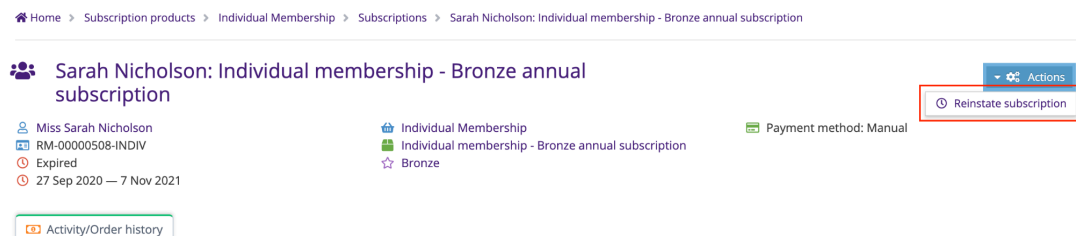
Reinstating an expired subscription

Subscriptions will naturally enter a status of Expired once the lapsed grace period is over. At this stage a subscription holder cannot pay and resume this subscription, and will typically need to go through a join online or application process in order to create a new subscription.

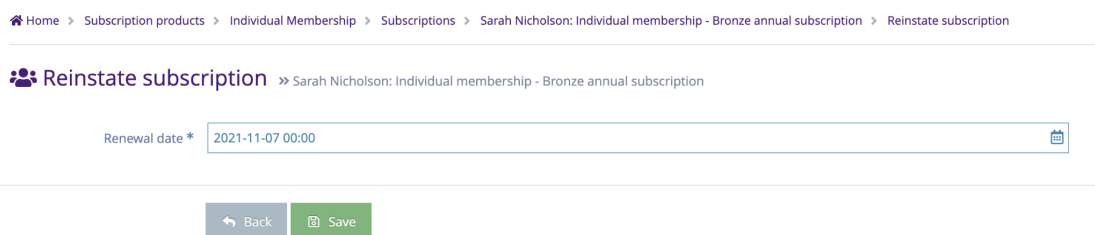
Administrators however do have a capability to reinstate an expired subscription.

To reinstate a subscription

1. Find the expired subscription you wish to **reinstate** either via the Contact/Organisation CRM record or directly via the subscriptions page
2. Via the **actions** menu, select **Reinstate subscription**



3. You'll then be prompted to enter the renewal date of the subscription (effectively the end date). This will default to the existing subscription renewal date, and you can only set a date which will set the status to be **Active**, . Specify a new **renewal date** and click **Save**

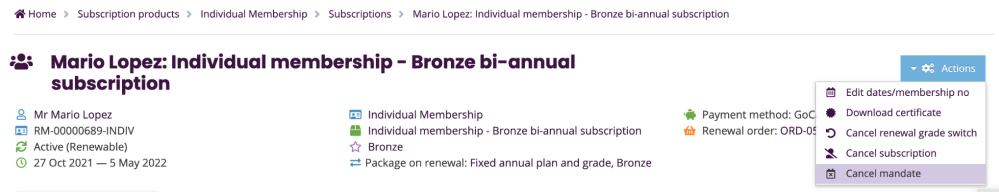


4. The status of the subscription will be governed as normal by the renewal date and the renewal settings, so the subscription will immediately be assigned the correct status based on this date, which could be **Active** or **Active (Renewable)**

Cancelling a recurring payment method like direct debit

You should be able to cancel a direct debit at almost any time. If there is a renewal order outstanding, then these will automatically be cancelled as well.

1. Find the subscription whose mandate you want to cancel either via the Contact/Organisation CRM record or directly via the subscriptions page
2. Under the actions menu select Cancel mandate

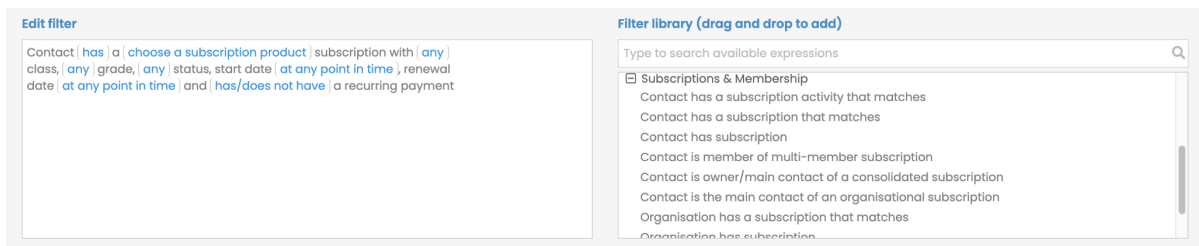


3. Confirm you want to cancel
4. If there is already a payment awaiting action at the payment provider, then it might not be possible to cancel the mandate until the payment has gone through, in which case you'll see this error message - *The subscription mandate cannot be cancelled because a payment is already submitted to the banking system for processing.*

Rules & Identifying contacts & organisations with subscriptions

There are a number of specific rule expressions available which will help you identify those contacts or organisations who have subscriptions. Amongst other things, with these you will be able to:

- Identify those who have an active subscription
- Identify those who have a subscription which is available to renew
- Identify those who have a subscription that is due to lapse in the next X days
- Identify contacts whose organisation has an active subscription
- Identify contacts in a multi-contact subscription
- Identify contacts who have a consolidated subscription



With Rules, you can then use these in conjunction with other features within Preside or ReadyMembership in order to:

- Remind contacts about renewing when they are logged in to the website by creating an announcement
- Sending contacts who are about to enter a state of lapsed a reminder email letting them know the member benefits they are about to lose, by setting up a daily newsletter that targets those people whose subscription end date is in 2-days time
- Locking down access to particular Groups or areas of the site to only contacts who have an active subscription

Membership applications

A join online or application process is out of the remit of this guide, however they generally end up with a subscription being created, so it is worthwhile discussing what happens generally at the end of the process.

With a join-online process the user will typically get a subscription immediately created at the end of the process. Depending on how it has been implemented, either they will select the subscription/grade they wish to purchase or by answering a number of questions, their grade will be chosen for them. The user will then complete the payment step where they choose the subscription plan which determines subscription length, payment terms etc, and finally their subscription will be created.

An application process works in a similar way, however there is an administrative step once all the information has been submitted by the user. The administrator then performs any checks and processes to validate the information submitted, and on approval they will typically confirm the subscription grade, and a pending subscription will be created. The user will be contacted by email to complete the payment process which activates the subscription.

Configuring applications for a subscription product

With the feature enabled by Pixl8, when you view a subscription product and select the Configure subscription item under the Actions button, you'll see a tab for enabling and configuring the application settings for the product.

The settings here control all of the grades you can choose for the product during the application process. These settings govern whether the product and grades within it can be applied for, and also whether an application fee is charged as part of the process

Edit Subscription product, 'Individual Membership'

Basic settings Payment settings **Applications settings** Product picker Xero accounting

Enable membership applications ☒

Application fee

Currency

Tax rate

Price includes tax ☒

Payment methods

Invoice: Invoice

Stripe: Stripe payments

SagePay: RMS

WorldPay: WorldPay

GoCardless Direct Debits: GoCardless Direct Debit

Direct debit: Manual direct debit

SLIM CD: Slim CD payments

Invoice: Cheque

Type to search Payment gateway configurations

Invoice line item

Configuring applications for a specific grade


If you have enabled application on the subscription product as a whole, then you can use the grade specific application settings to override the overall settings. This may be so that a particular grade doesn't show up in the application process or to change or remove the application fee for the particular grade.

You will see a tab called Membership Applications when you edit a grade.

Processing applications

If applications are enabled for a subscription product, then when you view the subscription you'll see an **Applications** tab which lists all the applications made by users and the status

[Home](#) > [Subscription products](#) > [Individual Membership](#)

 **Individual Membership**

Actions...

Subscriptions Plans and pricing **Applications**

Ungrouped

Pending

Manage filters... Advanced filter

Status	Contact	Subscription product	Class	Grade	Date applied	Date modified
Approved	Mr Bruce Willis	Individual Membership	Standard	Titanium	24 May 2022 11:50:09 AM	
Pending	Professor X Man	Individual Membership	Standard	Titanium	24 May 2022 11:22:37 AM	
Approved	Miss Mary Pop	Individual Membership	Standard	Bronze	10 May 2022 12:33:30 PM	

Simply click into one to see its status and details, and if it is in a state of Pending, then you get the choice of either **Approving** or **Rejecting** it.

Individual Membership Application for Professor X Man

Class: Standard
Grade: Titanium
Date applied: 24 May 2022
Application status: Pending

Professor X Man
profx@xman.com

Created 4 hours ago by X Man (web)
Updated 4 hours ago by X Man (web)

Approve

Reject

Review application

If approving a subscription, you will be asked whether a payment needs to be made in order to activate the subscription. If it does, then a system email **Membership application approved by admin and subscription is pending payment** will be sent to the contact. If no payment is required then the system email **Membership application approved by admin and subscription is active** will be sent to the contact.

Individual Membership Application for Demo person

Approve application

Does the applicant need to pay or will you waive the payment? ☒ The applicant needs to make a payment in order to activate the subscription. The applicant will be sent an email with directions to pay.
☐ I will waive the subscription fee for this applicant and the subscription will be immediately activated. A welcome email will be automatically sent.

Cancel

Approve

If rejecting a subscription, then no email is sent to the contact.

Consolidated subscriptions

Consolidated subscriptions cater for a niche situation whereby an organisation may pay for staff membership, or a head office may pay for the subscriptions for branches or subsidiaries.

Each of these are subscriptions in their own right, however they are consolidated into a single invoice on renewal.

There are some conditions around the type of subscriptions which can be consolidated:

- They must all renew on the same day
- They must all be one-off payments and not instalments
- The consolidate invoice cannot be paid by a recurring payment method
- There must be a CRM relationship between organisations or an organisational relationship for contacts

Due to the specific user case that they were developed for, this feature is not turned on by default on websites and further enhancement work is not planned. Please contact your CSM if you feel this feature could be beneficial to you.

Creating a consolidated subscription

Once the feature is enabled, from the **CRM** menu within **Membership**, click on the menu item called **Consolidated Subscriptions**. This will list all of your existing subscriptions, and to add one, click on the **Add consolidate subscription** button

[Home](#) > [Consolidated subscriptions](#) > Add Consolidated subscription

+ Add Consolidated subscription

Overview

Label *

Will appear on invoices, e.g. Acme Ltd. Annual subscriptions

Description

Owner info

Owner type *

☒ Organisation

An organisation will pay for one or more subscriptions in a single invoice for itself and/or its members.

☐ Individual

An individual will be paying for multiple different subscriptions in a single invoice.

Organisation

Type to search Organisations

Main contact

Type to search Contacts

Billing address

Address1 *

Address 2

Address 3

Town

Region

Postcode *

Country *

Select an Option

Accounting

Accounting stream *

Type to search Accounting streams

Subscriptions

Selection method

☒ Automatic

Automatically attempt to add all eligible subscriptions based on your choice of owner and accounting stream.

☐ Choose subscriptions

Choose specific subscriptions now.

☐ Later

Do nothing now and manually add subscriptions later.

Overdue payment reminders

Send payment reminders?

☐ No reminders

Do not send any reminders

☒ Use Payments settings default reminder schedule

Use the Payments default reminder action: No reminders

☐ Specific reminder set

Choose a specific set rather than the default

I want to add another Consolidated subscription ☐

[Cancel](#) [Add Consolidated subscription](#)

Most of the fields shown are self explanatory and used elsewhere, however **Owner info** and **Subscriptions** need more explanation

Completing the Owner info

This section defines how subscriptions are discovered.

Where the **owner type** is an **organisation**, you will then be able to pick subscriptions that either belong to contacts who work at that organisation or other organisation subscriptions that have a CRM relationship with (see the CRM user guide for more information on this). For **Individual** owner types, this is where a particular contact has more than one subscription, and therefore wants a single invoice covering all.

Completing the subscription information

Based on the owner info configuration, this defines how subscriptions are connected to the consolidated invoice.

- **Automatic** means that based on the relationship, any subscriptions will automatically be added to the consolidated subscription.
- **Choose subscriptions** mean that the administrator can select any subscriptions from the dropdown that match the relationship
- **Later** means that it will do nothing now, but you'll need to add the subscriptions that match the relationship at another point.

It is recommended that just to test if everything is configured correctly that you select **Choose subscriptions**, so that you can instantly see which subscriptions qualify based on the relationship. If you're then happy, you can change it back to your preferred setting before saving.

Adding subscriptions to a consolidated subscription

Once you have created your consolidated subscription, depending on the configuration it may have added some existing subscriptions to it, but on going it won't, so any additional subscriptions that you want to be added to the consolidation will need to be manually added.

🔗 Pixl8 UK — Pixl8 Subscription

Pixl8 UK

- Active
- Renews on: 18 Dec 2024

Subscriptions
Order history

Search Subscriptions...

Doms
Payments
Plans
Product
QA
Status
Sub status
Ungrouped
Manage filters...
Advanced filter

Auto renewing
Corporate membership subscriptions
Lapsed (able to cancel)
Missed payments subscriptions

Ready for renewal
Status is pending
Subscription Status is Active

Status	Owner	Product/Package
Active	Pxl8 Germany	Corporate Membership: Bi-annual and grade, Standard > Standard: Medium

Showing 1 to 1 of 1 records, results per page: 10

+ Add subscription(s)...
Export data...
<< 1 >>

To add subscriptions to the consolidated subscription:




1. View the consolidated subscription
2. If there are available subscriptions that meet the relationship criteria, the **Add Subscription** will be clickable
3. Choose the subscriptions you want to add, and click **Add subscription**




If you were expecting other subscriptions to be available, check the relationship between the organisation and the contacts or other organisations, and ensure the subscriptions are in an active state

Viewing a subscription managed by a consolidated subscription

When you view a subscription, it will show on the ribbon whether it is part of a consolidated subscription, and hyperlink to it if it is

le, Standard > Standard: Medium

 Corporate Membership
 Bi-annual and grade, Standard > Standard: Medium
 Standard > Standard: Medium

 Billing consolidated in: [Pixl8 UK — Pixl8 Subscription](#)
 Current price : £30.00
 Renewal price : £30.00

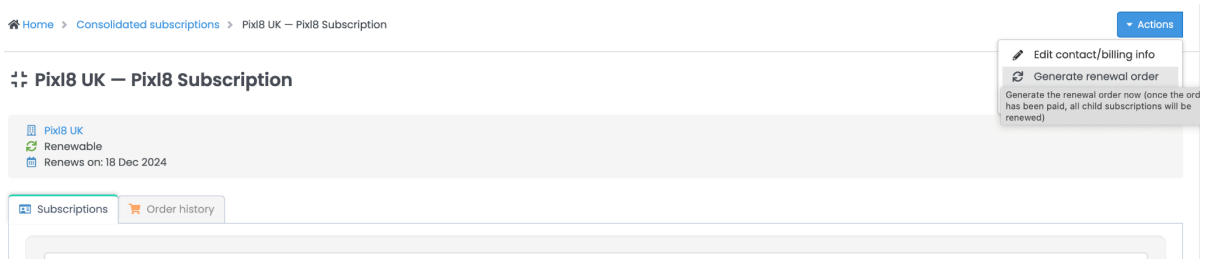
You will also note that some of the available actions won't be there - things like creating a renewal order, as these are now managed by the overall consolidated subscription.

You can however still change plans and grades just like a regular subscription.

From the front-end perspective, users when they login will still see that they have a subscription, but any payment information and orders won't show for them.

Renewing a consolidated subscription

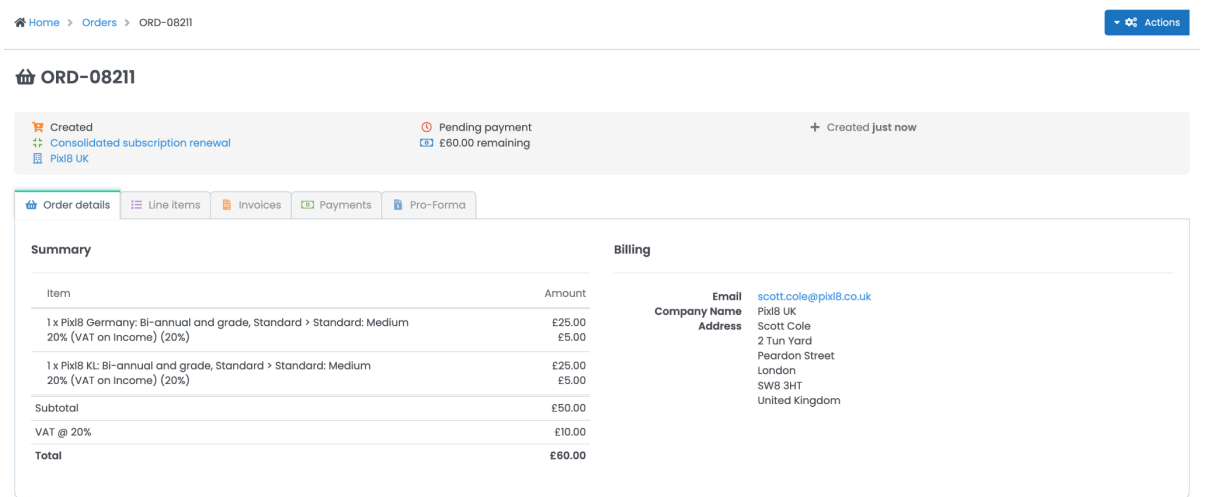
When the subscriptions within a consolidated subscription go into a renewable state, so too will the overall consolidated subscription.



Unlike a regular subscription, members do not go through the renewal process and select grade changes and pricing plans. There is no front-end for members, renewals are managed purely via the admin interface.

To renew a subscription:

1. View the consolidated subscription
2. Under the **Actions** button menu, select **Generate renewal order**
3. Send the order/invoice to the customer



If for any reason when you view the order that you find the prices hadn't been changed or grade switches weren't made, then make those adjustments to the subscription settings, then go back to the the consolidation subscription and from the Actions button, select **Regenerate renewal order**

When the order is paid online or marked as paid, all the subscriptions within it will be extended by their time period and go back into an Active status

Removing subscriptions from a consolidated subscription

If for example you have an organisational consolidation subscription for staff, and one of those staff leaves or wants to pay for their own subscription, then you can easily manage which subscriptions are included as part of the consolidation.

View the consolidated subscription, and click on the delete icon next to the subscription you want to remove. This won't delete the subscription, but just transfer ownership back to whoever is the relevant person.

Subscription discounts

Discounts was released in ReadyMembership version 2023.11 or CRM version 4.25

Discounts are specific to subscriptions, and therefore have a number of features which are unique to their use in this area, along with plenty which will be very familiar.

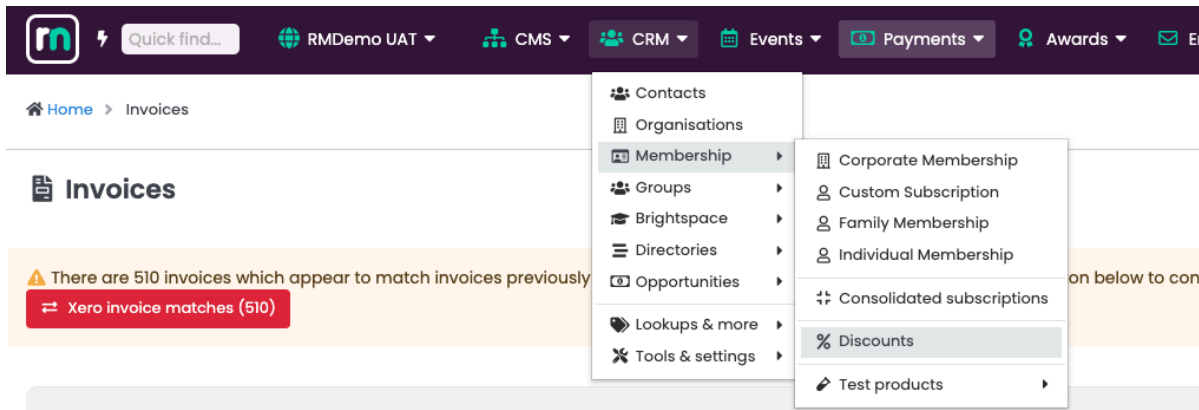
Here are some scenarios that you can use discounts for:

- Offer time based automatically applied discounts e.g. a summer promotion
- Offer early bird renewal discounts
- Discount particular grades or plans e.g. 10% off all annual upfront payment plans
- Promote discounts with single and multiple use codes
- Offer discounts for the first X number of instalments for new joiners

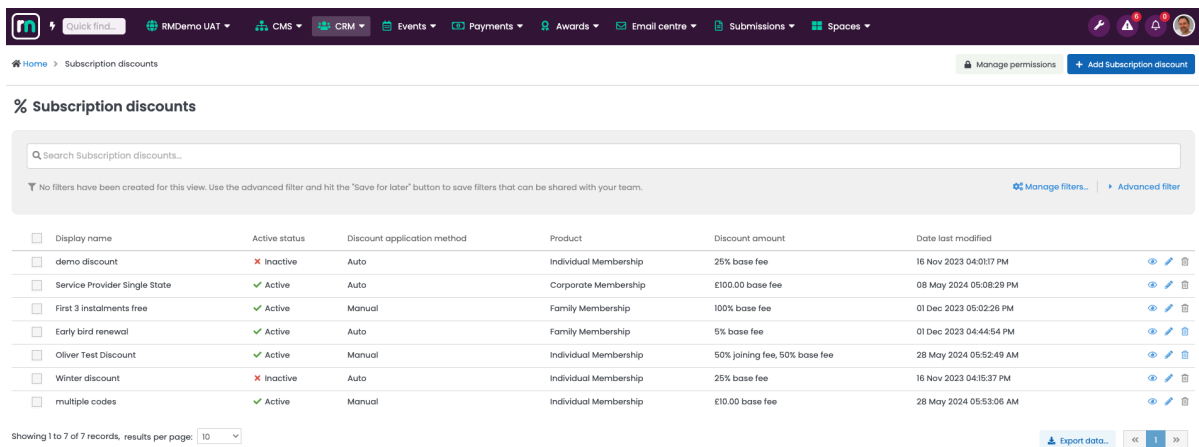
Worth noting, where a user can qualify for multiple discounts, the system will calculate and apply the discount which will give them the highest amount off. Unlike Eventfolio where discounts can be stacked, subscription discounts only support a single discount per subscription purchase.

Creating a discount

Discounts are located in the **CRM** menu under **membership**



To create a discount, click on the **Add subscription discount** button, and you'll be presented with a wizard which will walk you through the creation process



At the end of the wizard, you'll see a summary of how it will work and finally clicking Create discount will create the discount, and depending on your settings it will immediately be available for your users.

Add a discount which automatically applies

Automatic discounts can be applied on a time basis or based on a user meeting a specific criteria or purchasing a specific subscription.

1. On the first page of the wizard, select **Automatically applied discount code** for the **Discount application method**

+ Add Subscription discount

The screenshot shows the first step of a five-step wizard. The progress bar at the top indicates the current step is 'Basic' (1), followed by 'Qualifying' (2), 'Method' (3), 'Summary' (4), and 'Confirmation' (5). The 'Basic details' section includes input fields for 'Internal label', 'Display name', and a rich text editor for 'Description'. The 'Discount application method' section has two radio button options: 'Manually enter discount code' and 'Automatically applied discount code', with the latter being selected.

Basic details

Discount details

Internal label *

Display name *

Description

Discount application method

☐ Manually enter discount code
The user will be required to enter a code in order for the discount to be applied

☒ Automatically applied discount code
The discount will automatically be applied during payment if the conditions are met

- a. If you only want it to be active for a certain period of time e.g. a summer promotion, then select **Active between dates** and enter your dates
2. The second page of the wizard identifies who qualifies for the discount and what it applies to

The screenshot shows the second step of the wizard, 'Discount qualifying'. It features a light blue informational banner stating that the discount applies to all subscriptions by default but can be filtered. Below this are three search input fields for 'Product', 'Grade(s)', and 'Plan(s)'. A 'Who is eligible for this discount?' section contains a 'Contact filter' search field. The 'Discount applies to' section has two checkboxes: 'Joining' and 'Renewals'. The 'Instalments' section includes a toggle switch to limit the number of instalments.

Discount qualifying

Qualifying subscriptions

By default the discount will apply to all subscriptions. You can filter this so it only applies to specific products, grades or plans

Product

Grade(s)

Plan(s)

Who is eligible for this discount?

Contact filter

Discount applies to

☐ Joining
Only applies when the subscription is created.

☐ Renewals
Applies when the subscription is renewed for a further period.

Instalments

Do you want to limit the number of instalments the discount can apply to?

- a. By default the discount will apply across all subscription products, grades and plans, but you can narrow this down with the **product**, **grade** and **plan** selectors
- b. By default the discount will apply to anyone who purchases a subscription, you can narrow this down to a specific subset of users e.g. only those who attended your conference by adding a **Contact filter**
- c. The **Discount applies to** sections allows you to choose whether the discount only applies to new members signing up, existing members renewing or both. Where the discount applies to **renewals**, there are some specific settings on

how the discount applies

Renewals

- 1 If the subscription is for rolling renewal on 24 July, then the discount is valid **from 24 June to 29 June**.
- 1 The discount would apply **between 2 December and 7 December** for a fixed renewal date of 1 January.
- 1 The discount would apply **between 20 January and 25 January** for a fixed renewal date of 19 February.
- 1 The discount would apply **between 2 July and 7 July** for a fixed renewal date of 1 August.
- 1 The discount would apply **between 5 April and 10 April** for a fixed renewal date of 5 May.
- 1 The discount would apply **between 1 March and 6 March** for a fixed renewal date of 31 March.
- 1 The discount would apply **between 16 July and 21 July** for a fixed renewal date of 15 August.
- 1 The discount would apply **between 31 January and 5 February** for a fixed renewal date of 1 March.
- 1 The discount would apply **between 1 December and 6 December** for a fixed renewal date of 31 December.

This discount will only apply for the specified range of days before the user's subscription reaches its renewal date



From x days before the renewal date

25

To x days before the renewal date

30

Do you want to limit the number of times the discount applies to a user's subscription renewal?



Maximum renewals

1

- i. If you want to incentivise members to renew early, then select the option marked **This discount will only apply for the specified range of days before the user's subscription reaches its renewal date** and then enter a corresponding range of days. For example, if members are able to renew 30-days before their renewal date, and you wanted to offer a discount if they renew within the first 5-days of being able to renew, then you would enter 25 in the **From x days before the renewal date** field and 30 in the **To x days before the renewal date** field. When you enter timings in this field, examples are displayed to assist.
 - ii. If you want to limit the number of times someone can receive a discount for their renewal then check the option **Do you want to limit the number of times the discount applies to a user's subscription renewal** and enter a value in the maximum field. For example, if someone has a monthly rolling subscription, you may only want to give them a discount off the first time they renew, not subsequent renewals, so you would therefore check this option, and enter 1 as the maximum
- d. If you have an active payment plan for your chosen subscriptions which support payment by instalments, then you can limit how many instalments the discount applies to. For example for members taking out an annual subscription payable monthly, you could offer members 100% off their first instalment, so you would enter 1 in the **Maximum instalments** field

3. The third page of the wizard covers what the discount amount will be.

Home > Subscription discounts > Add Subscription discount

+ Add Subscription discount

Basic Qualifying **Method** Summary Confirmation

Discount method

NOTE: Where this discount only applies:

- When the subscription is created.
- When the subscription is renewed for a further period.
- For subscriptions payable by instalments, this discount will apply to each of those instalments.

☒ **Fixed amount**
The amount specified will be deducted from the overall price of the subscription

☐ **Percentage**
The overall price of the subscription will be reduced by the specified percentage

Discount currency:

Discount the joining fee: ☐

Discount the base fee: ☒

Discount value:

Back Next

- There are 2 forms of **discount amount**; fixed and percentage. For example if you wanted to discount all membership by £10, then you would choose a fixed amount as the discount method. If you wanted to give 50% off membership, then you would choose percentage
 - Depending on which subscriptions are eligible for discounts and what currencies you support, the **Discount currency** may have more than one currency listed. For example, if you are offering a fixed amount discount with a value of 10, and have subscriptions in GBP and Euro, then for some subscriptions it would be a 10 Euro discount and others a £10 discount. We would recommend splitting these into different discounts if this is applicable.
 - You can discount the joining fee and/or the base fee. The base fee is the standard amount someone would pay for their subscription e.g. £100 per year. It is **very important** to note, that where you offer instalments, this amount would be for the instalment not the overall price. E.g. if someone paid £120 per year, split over 12 monthly instalments, then putting £5 in the base fee discount, would mean each instalment would be £5, equating to £60 for the whole year
4. The fourth page of the wizard just summarises the choices made, and proceed to the final step to create the discount

Add a discount that requires a code

Often you don't want discounts to apply automatically, but for users to enter a code during the payment process which will then apply the discount appropriately.

1. On the first page of the wizard, select **Manually enter discount code** for the **Discount application method**

The screenshot shows the 'Add Subscription discount' wizard at Step 1: Basic details. The progress bar at the top indicates five steps: Basic (1), Qualifying (2), Method (3), Summary (4), and Confirmation (5). The 'Discount details' section includes fields for 'Internal label' and 'Display name', both containing the text 'manual discount'. Below these is a rich text editor for the 'Description'. The 'Discount application method' section has two radio button options: 'Manually enter discount code' (selected) and 'Automatically applied discount code'. The 'Active status' section has three radio button options: 'Inactive', 'Active' (selected), and 'Active between dates'. At the bottom right is a 'Next' button.

2. The second page of the wizard allows you to enter the codes the users will need to add in order to qualify for the discount

The screenshot shows the 'Add Subscription discount' wizard at Step 2: Codes. The progress bar at the top indicates six steps: Basic (1), Codes (2), Qualifying (3), Method (4), Summary (5), and Confirmation (6). The 'Discount codes' section has a text area for 'Discount code(s)' with a placeholder example: 'One discount code per line, e.g.: CODE-1, CODE-2, CODE-3'. Below this is a toggle switch for 'Do you want to limit the number of uses per code?' which is currently turned on. A 'Maximum uses' input field is visible below the toggle. At the bottom left are 'Back' and 'Cancel' buttons, and at the bottom right is a 'Next' button.

- a. Typically you may only wish to offer a single discount code, but it supports as many codes as you like to be entered. Each code should be on a separate line. There are a number of online services which can assist in creating multiple codes if you need them e.g. <https://www.voucherify.io/generator>
 - b. By default multiple users can use the same code to claim their discount. If you want to limit the number of uses, then check the **Do you want to limit the number of uses per code** option and enter the maximum number of uses allowed
3. Although users enter a code in order to receive the discount, you can still assign additional conditions on their qualification. View page 2 on **Add a discount which automatically applies** for full details
 4. Page four and the remaining steps in the wizard are exactly the same as page 3 and onwards, see **Add a discount which automatically applies** section for full details on these

Day to day management of subscription discounts

Editing discount codes

Once a discount code has been created, it can be edited via the discount grid listing or discount view screen. When you edit a discount, it reverts to a standard editing screen rather than presenting you with the same wizard used when creating it.

[Home](#) > [Subscription discounts](#) > Early bird renewal [Edit subscription discount](#)

% Early bird renewal

✓ Active

🔗 Automatically applied discount code

🔗 Only applies to renewals

📅 Only valid from 25 to 30 days before the renewal date

% Percentage

☐ Base fee: 5% off

% Summary

🔗 Discount details

Internal label:

Early bird renewal

Display name:

Early bird renewal

Description:

(No value)

⚙️ System properties

ID:

93AF3F8D~368A~4695~A9FID76EA0DFC893

Date created:

01 Dec 2023 04:44:54 PM

Date last modified:

01 Dec 2023 04:44:54 PM

📋 Subscriptions

Product:

multimembership

Grade(s):

(No value)

Plan(s):

(No value)

Adding additional codes

If you have a discount which requires users to enter a code, then you can manage the codes via the dropdown action button on the discount view screen

[Home](#) > [Subscription discounts](#) > First 3 instalments free [Edit subscription discount](#)

■ Add a new code

■ Add multiple new codes

% First 3 instalments free

✓ Active

🔗 Manually enter discount code

🔗 Only applies to new subscriptions

📅 Only applies to the first 3 instalments

% Percentage

☐ Base fee: 100% off

% Summary

Codes

🔗 Discount details

Internal label:

First 3 instalments free

⚙️ System properties

ID:

3312042F~E20D~4426~A42798CF3837F100

Depending on which option you select, you can either add a single code or multiple at once. You can also optionally control how many times the codes can be used.

Tracking orders with a discount

There are a number of rule expressions which will allow you to filter on orders which have used specific discounts, or discounts amounts.

The **has specific discounts** rule expression will allow you to find all orders which have a specific subscription discount. When you use this expression, it combines the subscription discounts with any Eventfolio discounts as well.

Orders

Search Orders...

Status

Ungrouped

Aged Debtor

Order has held payments

Order that contains failed payment(s)

Orders paid by Stripe

Manage filters...

Advanced filter

Outstanding payments for subscriptions over 30 days ago

Overdue orders

Shop orders that need sending

Unpaid orders (events)

Edit filter

has any of the following: please select one or more values

Filter library (drag and drop to add)

dis

Order expressions

Disable reminders is true

Discount amount compares to (x)

has (x) number of Discounts

has specific Discounts

has/does not have any Discounts

Net amount after discount compares to (x)

Save for later...

#

Order for

Status

Gross amount

Due amount

Owner

Method

Date created

No records found

Showing 1 to 0 of 0 records, results per page: 10

Export data...

<<

>>

Seeing how many times a discount code has been used

If you have a discount which requires users to enter a code, then you are able to easily see how many times the code(s) have been used. Simply go to the view screen on the discount and view the **Codes** tab

Home > Subscription discounts > First 3 instalments free

Edit subscription discount

% First 3 instalments free

Active

Manually enter discount code

Only applies to new subscriptions

Only applies to the first 3 instalments

Percentage

Base fee: 100% off

% Summary

Codes

Search Subscription discount codes...

No filters have been created for this view. Use the advanced filter and hit the "Save for later" button to save filters that can be shared with your team.

Manage filters...

Advanced filter

Code

Maximum uses

Total uses

Date last modified

first3

Unlimited

1

01 Dec 2023 05:02:26 PM

Showing 1 to 1 of 1 records, results per page: 10

Export data...

<<

1

>>

Add code