



Subscriptions user manual

Creating and managing membership subscriptions in
ReadyMembership

CRM Version 4.13

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Changes

Version	Date	Who	Description
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Changes	2
Introduction	6
At a glance functionality	7
Subscription features	7
Subscriptions overview	8
A subscription timeline	8
Configuring subscriptions	10
Maintaining Subscription Products	11
Configuring membership numbers	12
Configuring how it looks when joining	12
Setting up default payment methods	13
Maintaining classes	14
How to add or edit a class and make it available to apply for	15
Maintaining grades	17
How to add or edit a grade and make it available to apply for	17
Maintaining subscription plans	18
How to add and edit a subscription plan	19
Paying by instalments	20
Setting up instalments	21
How do instalment orders get created?	22
Can i change the date the instalment payments are taken?	23
Can I change the price of the instalments?	23
Can I change the billing address for the instalments?	24
Cancelling a subscription that is payable by instalments	25
Cancelling a payment schedule	25
What happens if I switch the grade for a subscription that has an instalment payment schedule?	25
What happens if an instalment fails payment or just isn't paid?	26
How do I configure instalments so that it allows for multiple unpaid months before a subscription expires?	26
Fixed Renewal dates	27
Rolling versus fixed Renewal dates	27
Setting up a fixed renewal date and configuring pro-rata	27
How to reduce near concurrent subscription payments when a user joins close to the fixed renewal date	28
How to reduce near concurrent instalment payments when a user joins close to the date of their next instalment	29
Configuring subscription packages	30
How to add and edit a subscription package	31

How to configure renewals for a subscription	32
Changing when a contact can renew their subscription and for how long	32
Setting up automated emails when a subscription can be renewed	33
Setting up additional renewal reminder emails	34
Example of sending an email to contacts whose subscription has just lapsed	34
Adding renewal calls to action on your website	37
How does a user renew their subscription?	37
Renewal process for users who pay by direct debit	38
Changing when the instruction is sent to the payment provider to take payment and renew a subscription	39
What happens if a users direct debit fails?	39
Handling a permanent direct debit failure	39
Handling a temporary direct debit failure	40
What happens if a user cancels their direct debit directly with the provider?	40
Renewal process for users who pay by non-recurring methods	41
What is the process for a user to renew via the website?	41
How does a user renew without logging into the website?	42
Rules & Identifying contacts & organisations with subscriptions	42
Day to day user subscription management	43
Manually creating a subscription for a user	44
Picking the subscription for a contact or organisation	44
Creating a subscription where the applicant can choose a subscription plan	45
Creating a subscription where the applicant just needs an invoice in order to pay	46
Creating a subscription where no payment will be required	47
How to delete a pending subscription	47
Pausing & resuming a subscription	47
To Pause a subscription	48
Resuming a paused subscription	49
Cancelling or deciding not to renew a subscription	50
To cancel a subscription	50
Changing the grade of an active subscription	51
To make an immediate grade switch for a subscription	52
To make grade switch on renewal for a subscription	53
Cancelling a subscriptions grade switch on renewal	54
Reinstating an expired subscription	55
Cancelling a recurring payment method like direct debit	56
Membership applications	56
Configuring applications for a subscription product	57

Configuring applications for a specific grade	58
Processing applications	58

Introduction

The 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 format of membership fees, but could equally be used for things like a magazine subscription.

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 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 subscription products
- Unlimited subscription plans for each product
 - One off payments for Annual/Bi-annual and quarterly subscriptions
 - Regular monthly instalments for your subscription
 - Auto calculated pro-rata for fixed membership years
- Visual prodding of particular grades or pricing options
- Automated renewals process
- Reminder & failed payment emails
- Multiple payment methods included full integration with GoCardless

Subscriptions overview

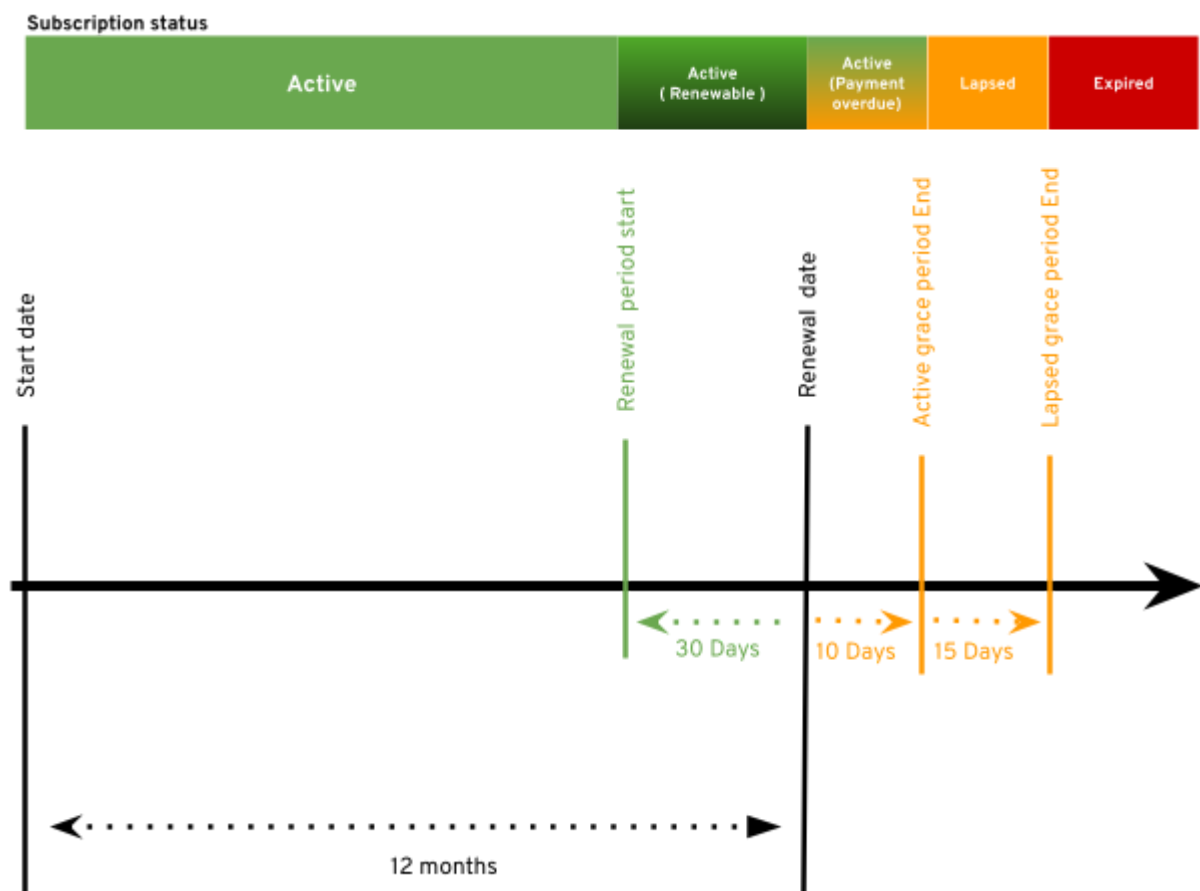
Subscriptions can be an extremely complex task, not only creating the structure and prices, but handling renewals and managing changes that a member wants to make.

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

- their renewal date will be 31st December
- They will go into a state of renewal on 1st December
 - 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
- If they don't renew by 31st December, then they will go into a state of Active (Payment overdue)
- If they haven't renewed by 10th January, then they will go into a state of Lapsed
 - They can still renew their membership at this point
 - They still see any call to actions via the Renewal widget
- If they haven't renewed by 25th January, then their subscription will go into a state of Expired
 - 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.

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 an 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.

Individual Application

Actions...

Subscriptions			
Plans and pricing			
Applications 82			
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%) Active	Direct Debit Fellow £174.00 (including VAT @ 20%) Active	Price not yet set. + Set price

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.

Individual Membership

Actions...

Subscriptions			
Plans and pricing			
Applications 82			
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 when they renew at the same grade their membership number stays the same, but if they change grade, then a new membership number will be created for that subscription.

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 *

Membership number format

Prefix

Padding

Suffix

[Cancel](#) [Save changes](#)

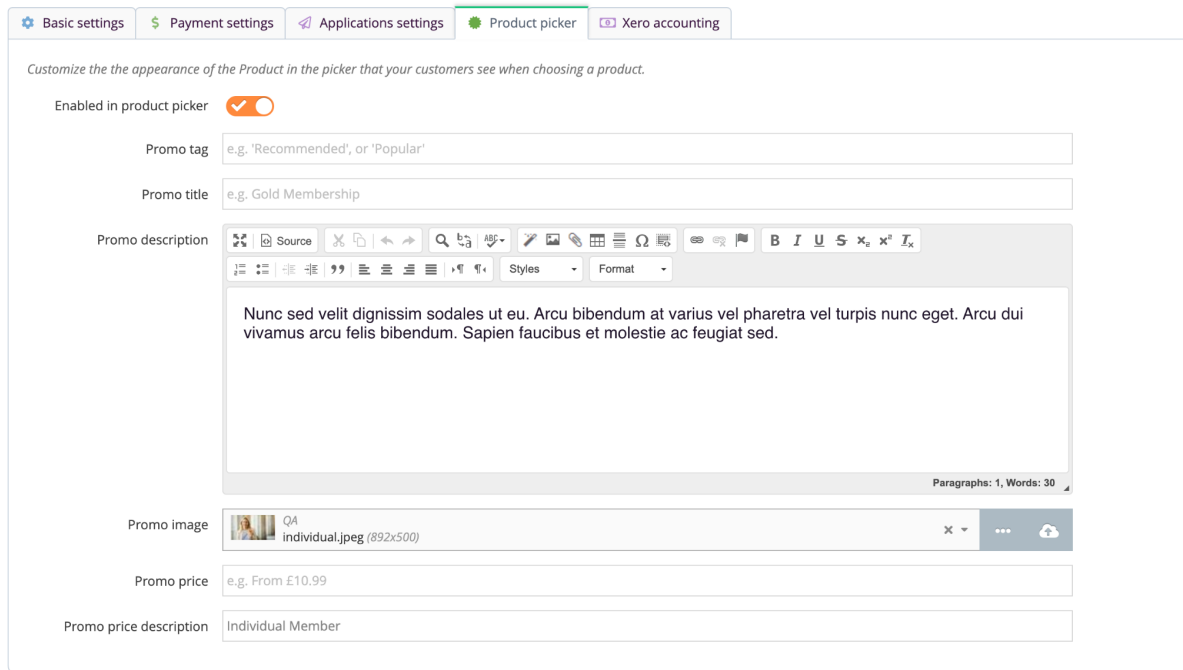
1. **Prefix** - the characters preceding the number itself
2. **Padding** - how long the number is in total
3. **Suffix** - the characters added after the number

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

Configuring how it looks when joining

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

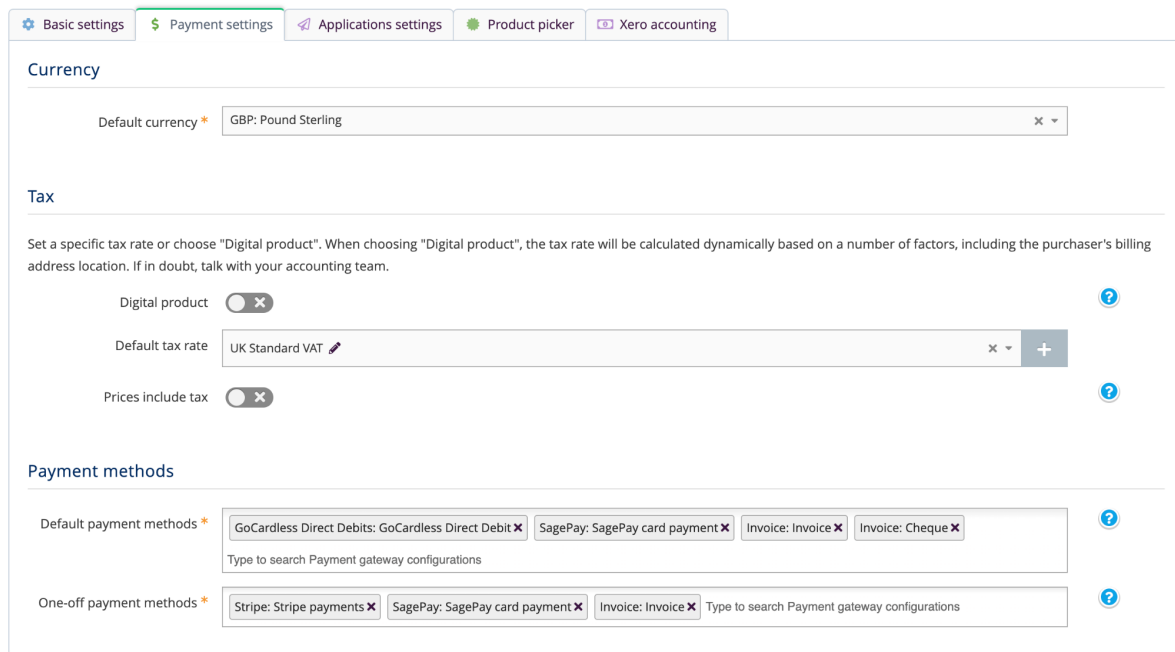
The promo fields allow you to present an overall impression of the product.

1. **Promo tag** - this is a short highlighted word to really help focus the user to this particular grade e.g. Recommended or Best Value
2. **Promo title** - this the title of the product
3. **Promo description** - this rich text description which you can use to explain the member benefits of this particular product
4. **Promo image** - this image will show for the product rather than the promo price and price description fields
5. **Promo price** - short price description e.g. From £20
6. **Promo price description** - longer price description e.g per annum by direct debit

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 you can fine tune them for specific packages or plans if necessary.

On the Payment settings tab



Currency

Default currency * GBP: Pound Sterling

Tax

Set a specific tax rate or choose "Digital product". When choosing "Digital product", the tax rate will be calculated dynamically based on a number of factors, including the purchaser's billing address location. If in doubt, talk with your accounting team.

Digital product ☐

Default tax rate UK Standard VAT

Prices include tax ☐

Payment methods

Default payment methods * GoCardless Direct Debits: GoCardless Direct Debit X SagePay: SagePay card payment X Invoice: Invoice X Invoice: Cheque X

Type to search Payment gateway configurations

One-off payment methods * Stripe: Stripe payments X SagePay: SagePay card payment X Invoice: Invoice X Type to search Payment gateway configurations

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.

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

Subscriptions Plans and pricing Applications 20

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 various

1. Add class
2. Edit class
3. Add grade to a class

1. Adding a class
2. Editing and deleting a class
3. Adding a grade to a class

How to add or edit a class and make it available to apply for

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

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

+ Add Subscription class

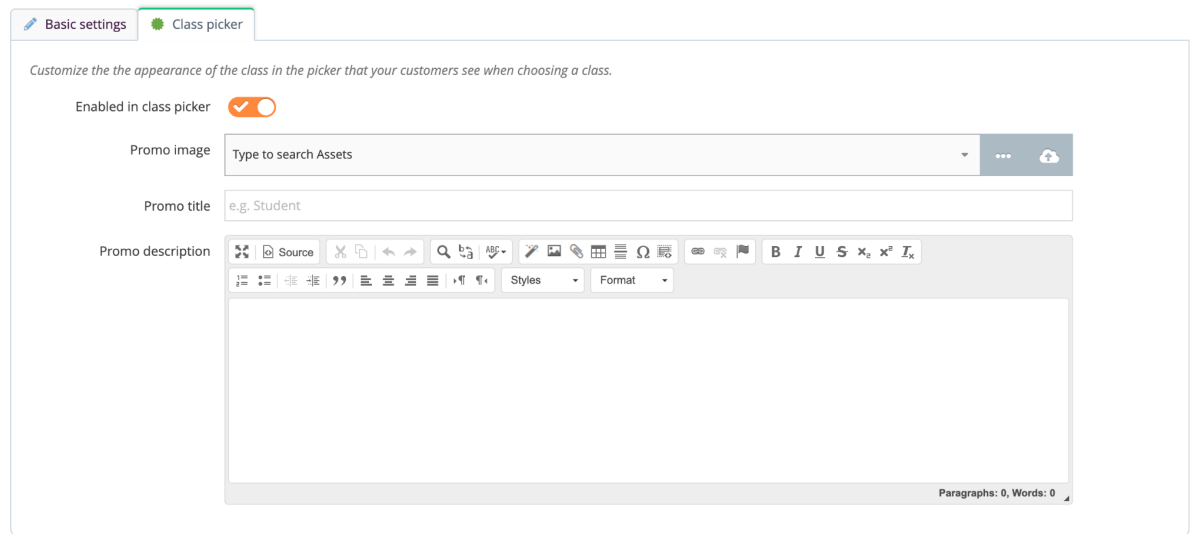
Basic settings Class picker

Class name *

Description

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

3. On the class picker tab



- 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 is option is turned on
- Promo image** - this image will only show during the user join/apply process against the particular class
- 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
- Promo description** - this rich text description will only show during the user join/apply process against the particular class

Maintaining grades

Subscriptions Plans and pricing Applications 33

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

1. Adding a grade
2. Editing a grade
3. Deleting a grade

How to add or edit a grade and make it available to apply for

7. 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
8. 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

Individual Application

[Actions...](#)

Subscriptions Plans and pricing Applications (33)

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

1 Add plan

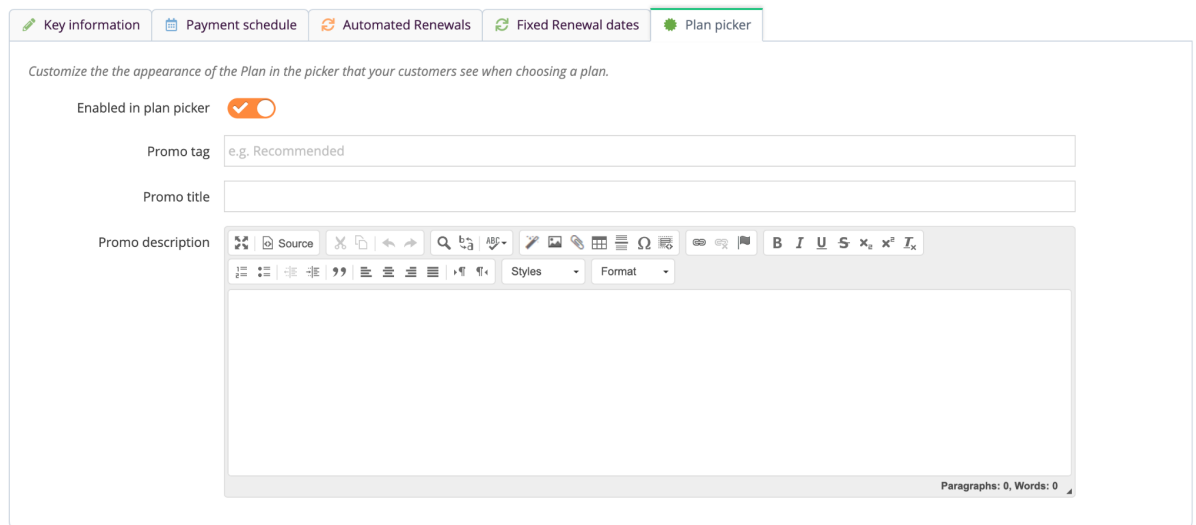
	2 Annual subscription, up front payment	3 Direct debit	Pay Monthly
→ Associate	Associate: Standard - Upfront £58.00 (including VAT @ 20%) Active	Direct debit £53.00 (including VAT @ 20%) Active	Pay Monthly £5.80 (including VAT @ 20%) Active
→ Basic	Annual £49.00 (including Zero rated @ 0%)	Direct debit 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

1. 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
2. On the **key information** tab
 - a. **Plan name** - This is an internal title
 - b. **Description** - This is an internal description
 - c. **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.
3. 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
4. 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
5. 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

Paying 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.

When a subscription is created which is paid for by instalments, a payment schedule for the subscription will be created which will show when each instalment is due, the amount and whether it has been paid yet.

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

Sora Ma: Individual membership – Bronze annual subscription (monthly schedule)

[Actions](#)

 Miss Sora Ma
 RM-00000275-INDIV
 Active
 1 Mar 2021 — 22 Oct 2022

 Individual Membership
 Individual membership - Bronze annual subscription (monthly schedule)
 Bronze

 Payment method: GoCardless Direct Debits

[Activity/Order history](#)
[Payment schedule](#)

Scheduled date	Price	Order	Payment schedule actions
22 Oct 2021	£47.99	✓ Completed	
22 Nov 2021	£47.99	✓ Completed	
22 Dec 2021	£47.99	✓ Completed	
22 Jan 2022	£47.99	✓ Completed	
22 Feb 2022	£47.99	✓ Completed	
22 Mar 2022	£47.99	✓ Completed	
22 Apr 2022	£47.99	✓ Completed	
22 May 2022	£47.99	✓ Completed	
22 Jun 2022	£47.99	Order not created	
22 Jul 2022	£47.99	Order not created	
22 Aug 2022	£47.99	Order not created	

Individual membership - Bronze annual subscription (monthly schedule)

Grade: Bronze

Start date: 01 March 2021

Renewal date: 22 October 2022

Subscription plan: Monthly

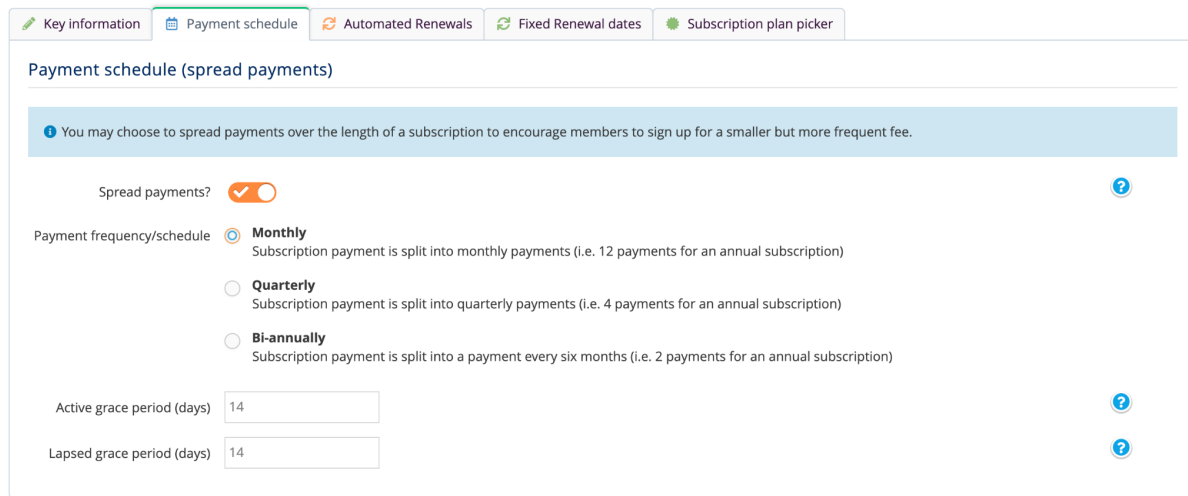
Status: ACTIVE

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:



The screenshot shows the 'Payment schedule (spread payments)' tab. At the top, there's a blue banner with a tip: 'You may choose to spread payments over the length of a subscription to encourage members to sign up for a smaller but more frequent fee.' Below this, the 'Spread payments?' toggle is turned on. Under 'Payment frequency/schedule', there are three radio button options: 'Monthly' (selected), 'Quarterly', and 'Bi-annually'. Each option has a description of how the annual subscription is split. At the bottom, there are two input fields for 'Active grace period (days)' and 'Lapsed grace period (days)', both set to 14. Help icons are present next to the toggle and the grace period 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

Scheduled date	Price	Order
07 Oct 2021	£52.78	✓ Completed
10 Nov 2021	£47.99	✓ Completed
10 Dec 2021	£47.99	✓ Completed
10 Jan 2022	£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

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

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

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 *

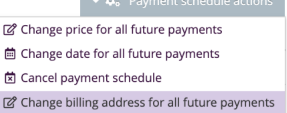
Reason *

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**

Scheduled date	Price	Order	
07 Oct 2021	£52.78	✓ Completed	  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

Cancelling a subscription that is payable by instalments

If you cancel a user's 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	
			Payment schedule actions	
Scheduled date	Price	Order		
07 Oct 2021	£52.78	✓ Completed		
10 Nov 2021	£47.99	✓ Completed		
10 Dec 2021	£47.99	✓ Completed		

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.

Fixed Renewal dates

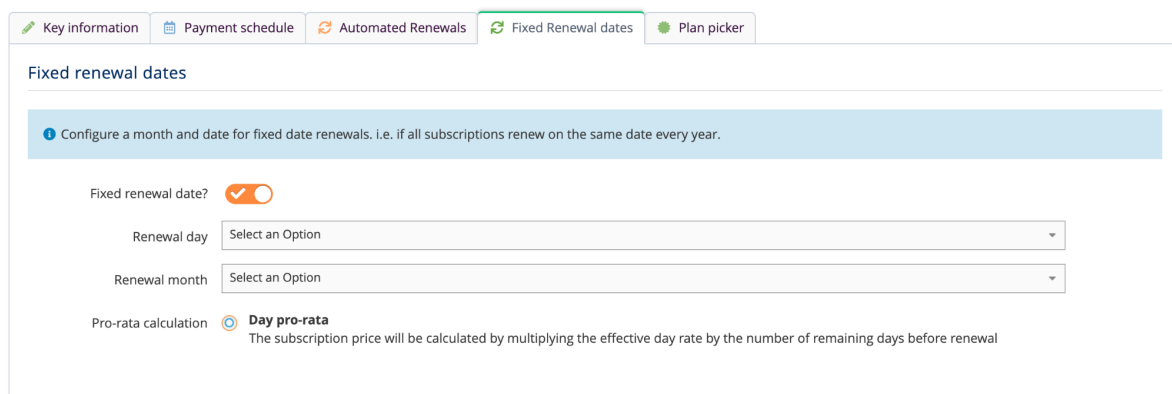
Rolling versus fixed Renewal dates

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



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

i 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 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 in 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

How to configure renewals for a subscription

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.

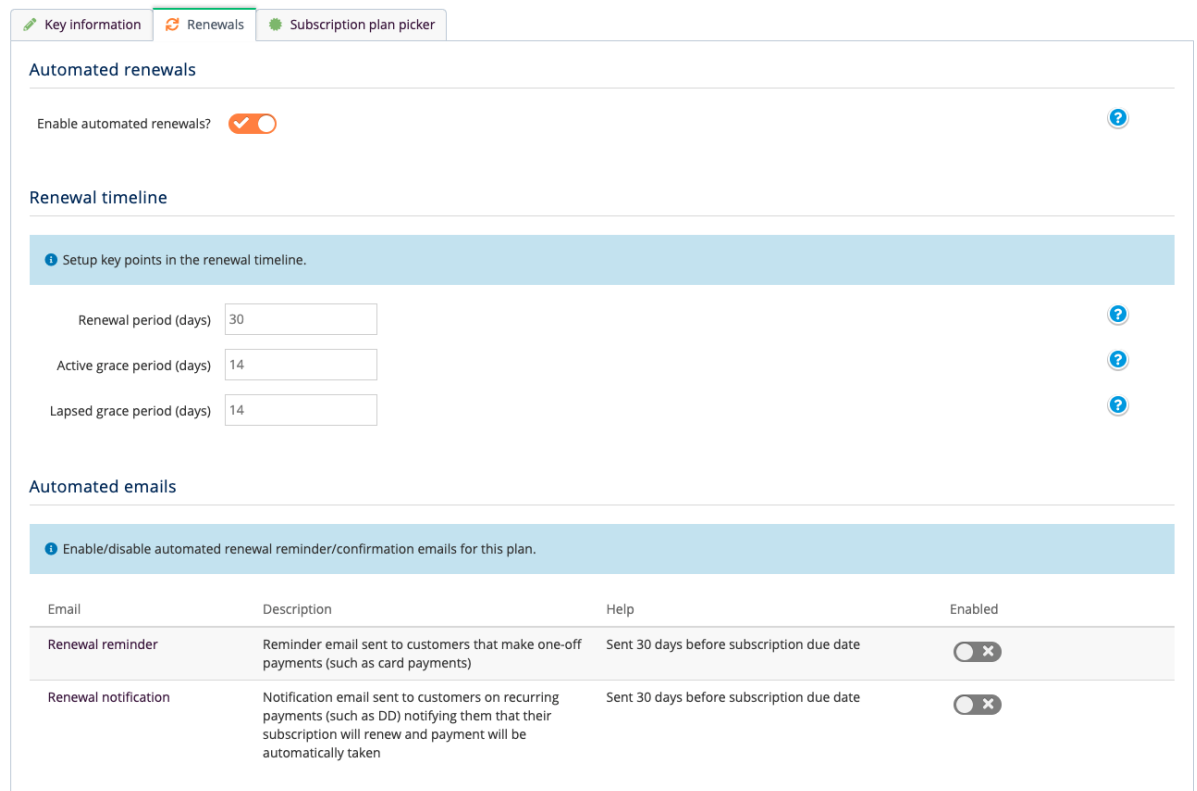
A subscription product can have a number of subscription plans which control the length and payment frequency. You also control the renewal settings in the subscription plan.

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

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

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



Automated renewals

Enable automated renewals? ☒

Renewal timeline

Setup key points in the renewal timeline.

Renewal period (days)

Active grace period (days)

Lapsed grace period (days)

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	☐
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	☐

4. In the Renewal timeline section you'll see:
- 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**
 - 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**
 - 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.

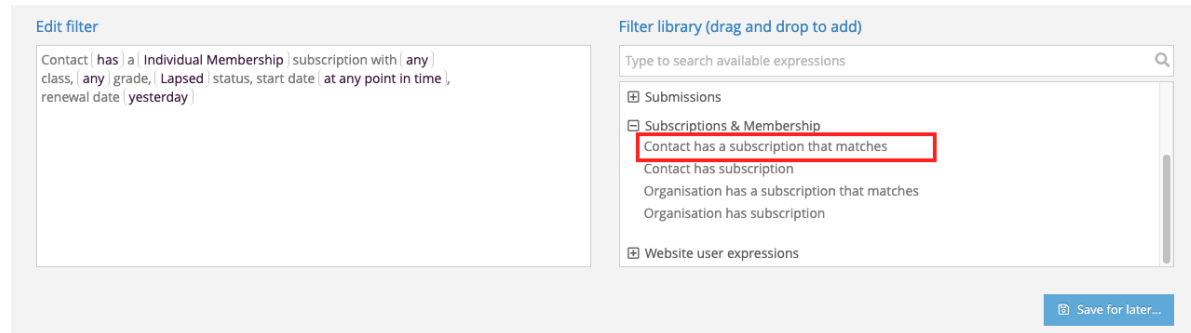
Example of sending an email to contacts whose subscription has just lapsed

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.

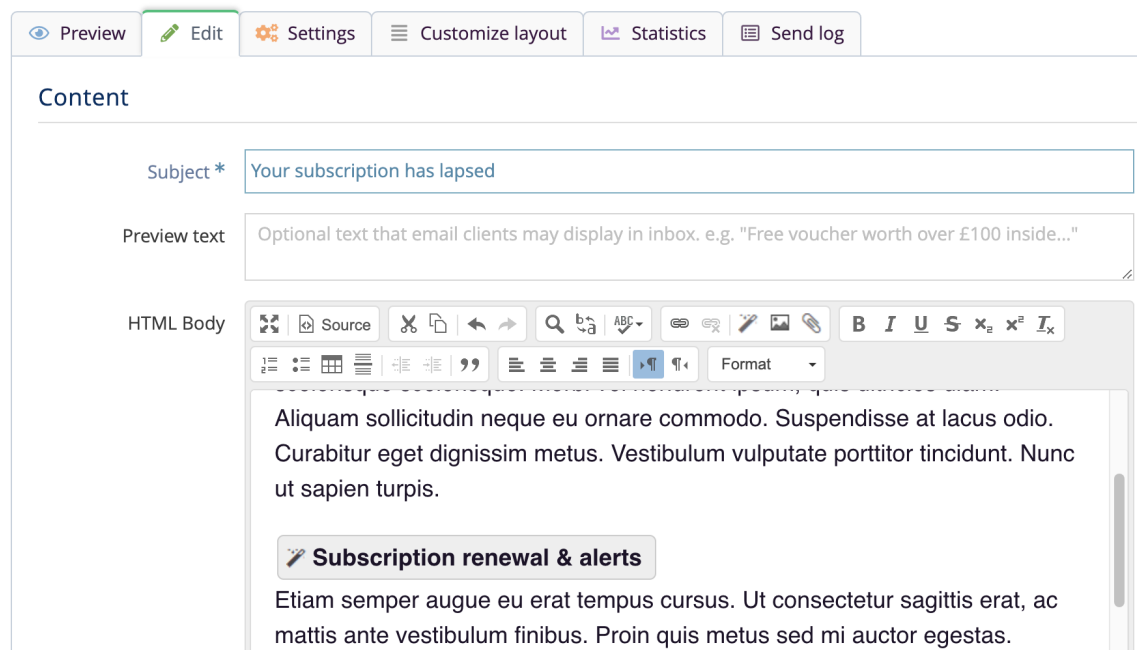
- Go to the CRM Contacts listing screen
- Create an advanced filter using the *Contact has subscription that matches* expression
- Select any particular grades/classes but choose **Lapsed** as the *status* and a *renewal date of yesterday*



- Click the *Save for later ...* button and name it accordingly

2. Create a newsletter and use the Renewal widget in the email content

- In Email Centre/Email and Newsletters, create a new email
- Select a blueprint that will target CRM contacts and complete basic email fields
- On the Edit tab, insert the **Subscription renewal & alerts** widget and add any additional copy



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

Recipient filter

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.

Marketing lists

Recipient filter

Ignore contact preferences ☒

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)

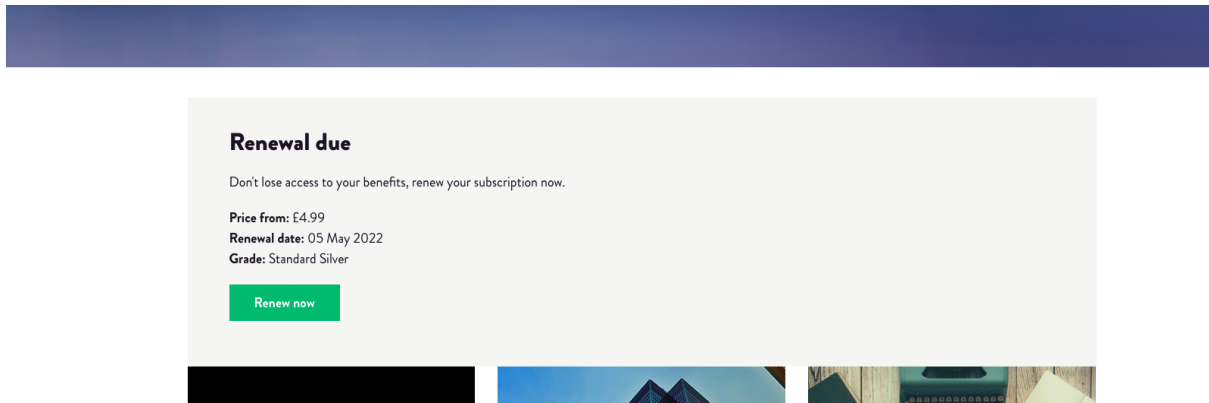
☒ **Limited**
Limited sending frequency; configure the elapsed time before an email can be sent again to a recipient

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

How does a user renew their subscription?

As previously mentioned, when a subscription enters a state of **Active (Renewable)** or **Lapsed**, then the user can optionally choose to renew their subscription.

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 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.

Renewal process for users who pay by direct debit

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

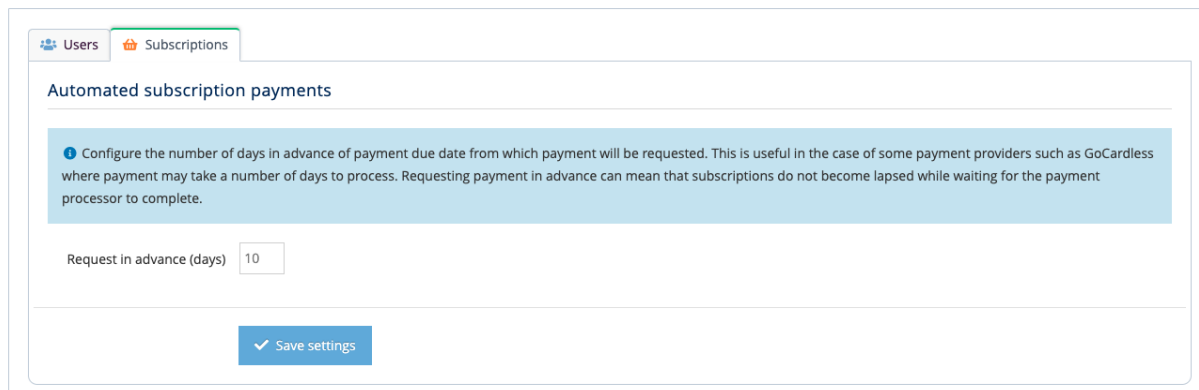
Changing when the instruction is sent to the payment provider to take payment and renew a subscription

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 'Subscriptions' tab selected. Under 'Automated subscription payments', there is a blue information box stating: '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, the 'Request in advance (days)' field is set to '10'. At the bottom, there is a blue button with a checkmark and the text 'Save settings'.

What happens if a users direct debit fails?

Direct debits 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 pay by non-recurring methods

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.

A user will not currently be able to switch grades as part of this process, however in future versions this will be possible depending on how administrators have configured subscriptions.

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

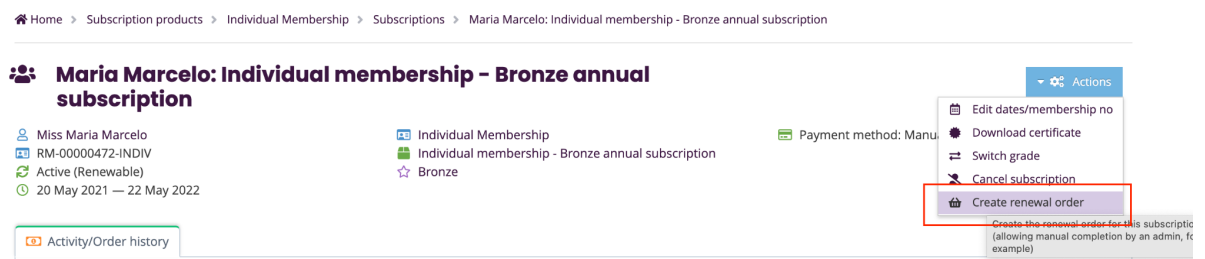
changed once the payment is confirmed

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.

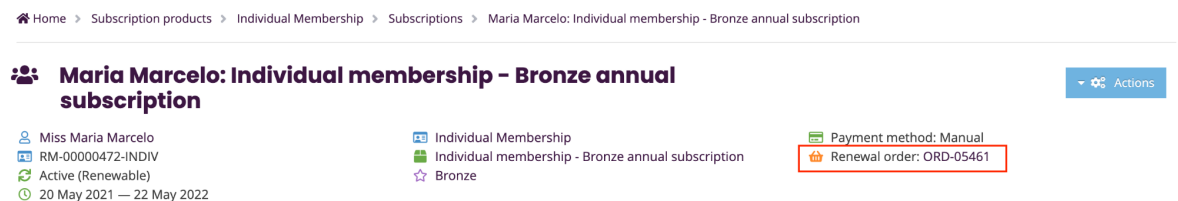
You can achieve this through the subscription admin

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**



The screenshot shows the subscription admin page for 'Maria Marcelo: Individual membership - Bronze annual subscription'. The 'Actions' menu is open, and the 'Create renewal order' option is highlighted with a red box. A tooltip for this option states: 'Create the renewal order for this subscription (allowing manual completion by an admin, for example)'. Other options in the menu include 'Edit dates/membership no', 'Download certificate', 'Switch grade', and 'Cancel subscription'.

3. Confirm you actions



The screenshot shows the subscription admin page after the renewal order has been created. The 'Renewal order: ORD-05461' is displayed in a red box. The 'Payment method' is set to 'Manual'.

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.

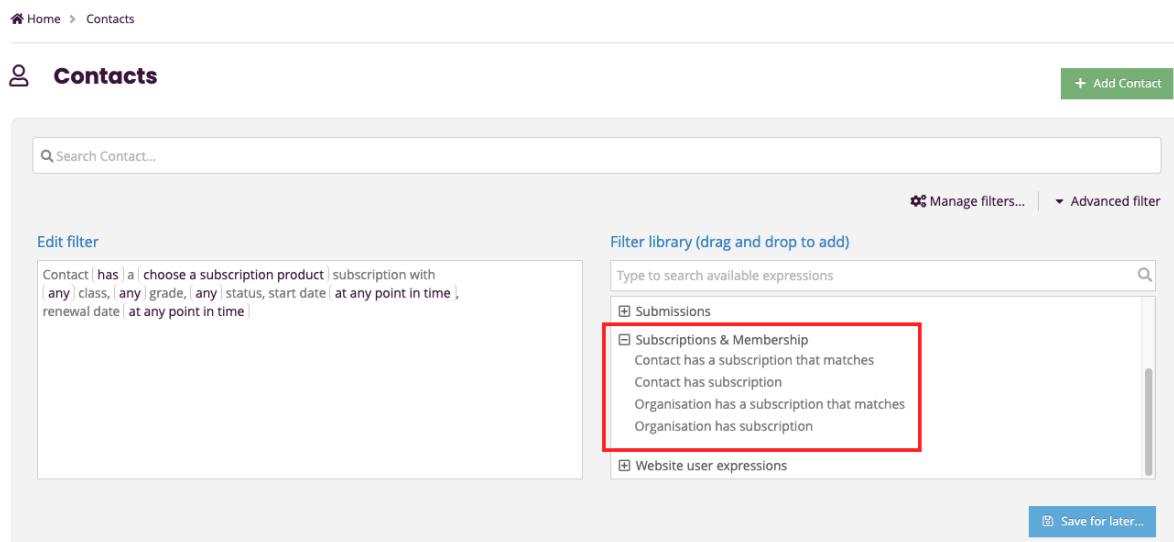


The subscription and renewal date won't be updated until the order has been marked as being paid.

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



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

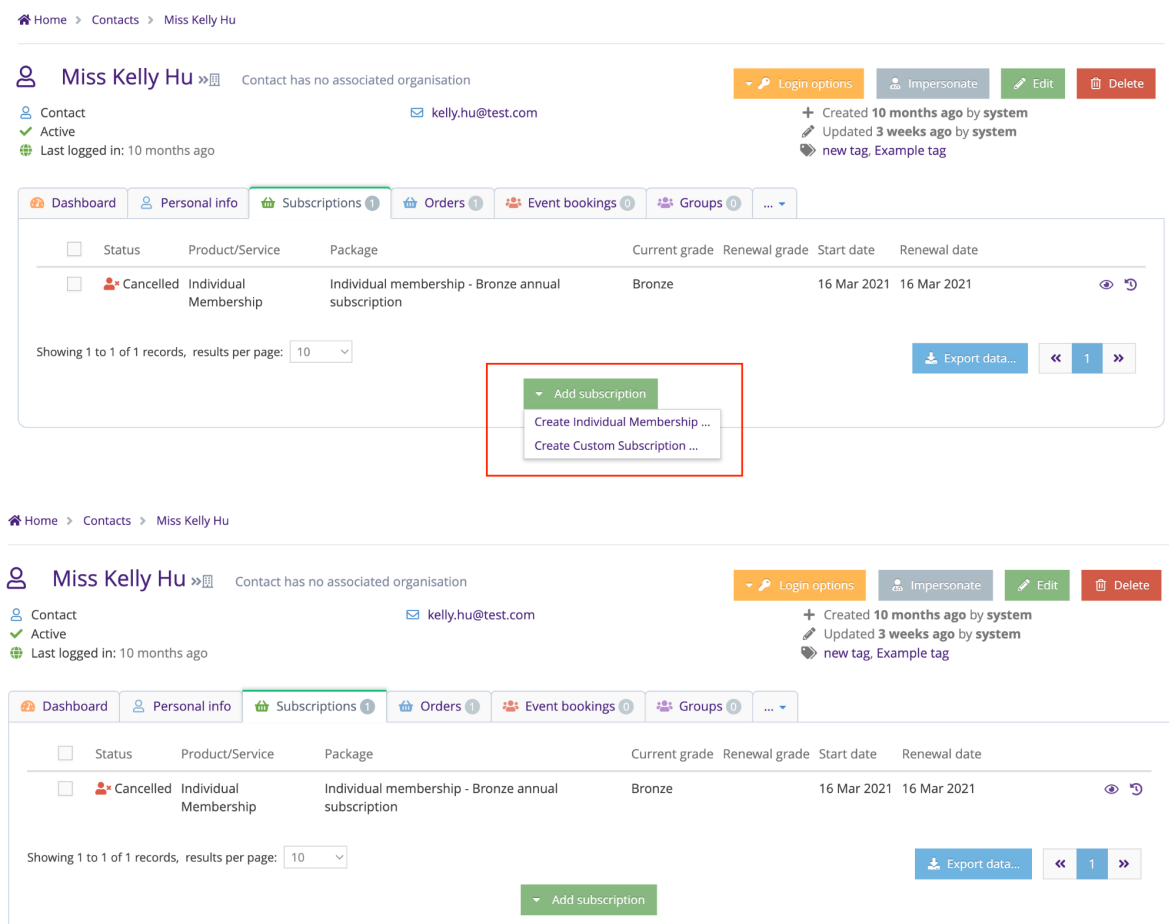
Day to day user subscription management

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

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



The screenshot shows the 'Subscriptions' tab for 'Miss Kelly Hu'. The interface includes a header with navigation links, a user profile section, and a table of subscriptions. A red box highlights the 'Add subscription' button in the bottom right corner of the table.

Subscriptions Table:

Status	Product/Service	Package	Current grade	Renewal grade	Start date	Renewal date
☐ 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

Add subscription

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

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 ✕ +
Class *	Type to search Subscription classes ▼
Grade *	Type to search Subscription grades ▼
Package *	Type to search Subscription packages ▼

[Cancel](#) [Add Subscription](#)

- 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
 - Class** - when you select a class the grade picker will be limited to show only the grades for the selected class
 - Grade** - when you select a grade the package picker will be limited to show only the packages for the selected grade
 - Package** - this is essential which subscription plan for the selected grade
 - Click **Add subscription** to go to the next step
- 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.

- Follow the steps for *Picking the subscription for a contact or organisation*
- 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.*
- On the final step enter a custom message if required which will be added to the email the applicant will be sent
- On confirmation, the system email *Subscription payment request* is sent to the application and a subscription with a status of **Pending** is created
- 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.

- 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.

- Follow the steps for *Picking the subscription for a contact or organisation*
- 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**

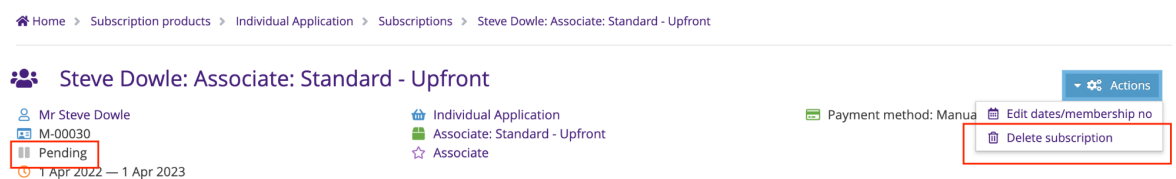
Creating a subscription where no payment will be required

1. Follow the steps for *Picking the subscription for a contact or organisation*
2. On the third step choose *I will waive the subscription fee for this applicant and the subscription will be immediately activated.*
3. 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.
4. 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

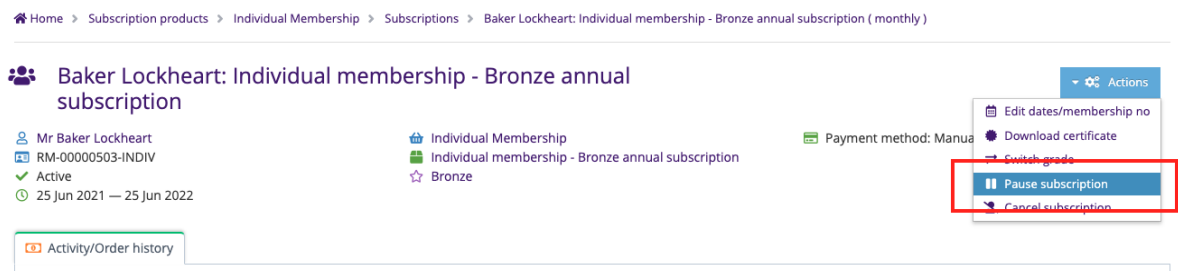
There are instances where you may wish to pause a persons subscription. Perhaps during a break in professional work such as maternity or paternity leave, long term sickness or being furloughed during covid times.

While a subscription is paused, their renewal and any payment dates are on hold until the subscription is reactivated, and 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.

To Pause a subscription

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



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

Pause subscription » Baker Lockheart: Individual membership - Bronze annual subscription (monthly)

Start date* 2022-02-11

Duration* 1

Unit* Month(s)

[Back](#) [Pause subscription](#)

- a. **Start date** - this can be any date in the future
 - b. **Duration** - this number of units e.g. 3 Months etc
 - c. **Unit** - the block of time which can be days, weeks, months or years
 - d. Click **Pause subscription** to confirm your choice
7. 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

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 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

Home > Subscription products > Individual Membership > Subscriptions > Baker Lockheart: Individual membership - Bronze annual subscription (monthly)

Baker Lockheart: Individual membership - Bronze annual subscription

 Remove pause schedule

 Actions

 Mr Baker Lockheart
 RM-00000503-INDIV

 Individual Membership
 Individual membership - Bronze annual subscription (monthly)

 Payment method: Manual

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.

[Home](#) > [Subscription products](#) > [Individual Membership](#) > [Subscriptions](#) > Baker Lockheart: Individual membership - Bronze annual subscription (monthly)


Baker Lockheart: Individual membership - Bronze annual subscription


 Mr Baker Lockheart
 RM-00000503-INDIV


 Individual Membership
 Individual membership - Bronze annual subscription (


 Payment method: Manual





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**

[Home](#) > [Subscription products](#) > [Individual Membership](#) > [Subscriptions](#) > Baker Lockheart: Individual membership - Bronze annual subscription (monthly)


Baker Lockheart: Individual membership - Bronze annual subscription

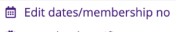

 Mr Baker Lockheart
 RM-00000503-INDIV
 Active
 25 Jun 2021 — 25 Jun 2022


 Individual Membership
 Individual membership - Bronze annual subscription
 Bronze

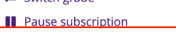

 Payment method: Manual















3. On the subsequent cancel screen

[Home](#) > [Subscription products](#) > [Individual Membership](#) > [Subscriptions](#) > Baker Lockheart: Individual membership - Bronze annual subscription (monthly) > Cancel subscription

 **Cancel subscription** >> Baker Lockheart: Individual membership - Bronze annual subscription (monthly)

- Option *
- ☐ **Cancel from subscription due date**
 Cancelling a subscription from it's due date means the member will continue to have access to their subscription benefits until that date. Renewal communications will not be automatically sent to that member.
- ☐ **Cancel with immediate effect**
 Cancelling with immediate effect will discontinue the member's benefits straight away.

Reason for cancellation *

Send cancellation email ☒

[Back](#) [Save](#)

- 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

[Home](#) > [Subscription products](#) > [Individual Membership](#) > [Subscriptions](#) > [Baker Lockheart: Individual membership - Bronze annual subscription](#)

Baker Lockheart: Individual membership - Bronze annual subscription

 Mr Baker Lockheart
 RM-00000503-INDIV
 Cancelled
 25 Jun 2021 — 11 Feb 2022

 Individual Membership
 Individual membership - Bronze annual subscription (monthly)
 Bronze

- 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 - 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

- 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 **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
RM-00000689-INDIV
Active
27 Oct 2021 — 27 Apr 2022

Individual Membership
Individual membership - Bronze bi-annual subscription
Bronze

Payment method: Manual

Activity/Order history

Actions

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

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%)

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

- 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...

- a. Select **Switch on Renewal** for the Switch time
 - b. Select the new grade
 - c. Click the **Next** button
 - d. 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

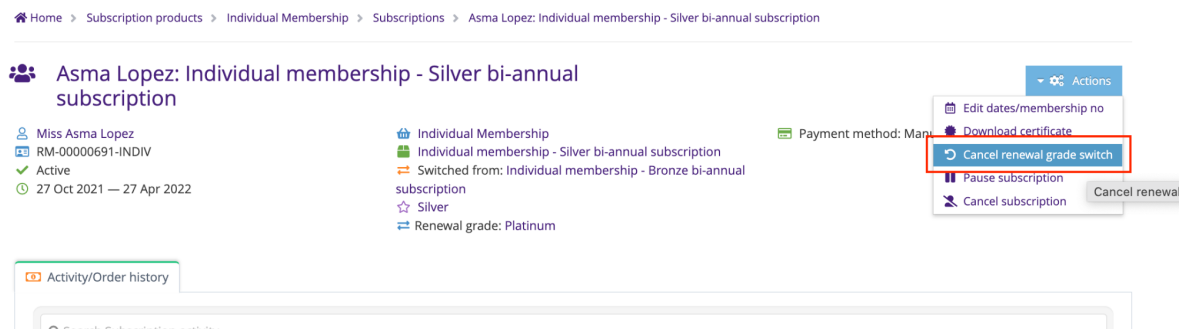
 Activity/Order history

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

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 **Cancel renewal grade switch**



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

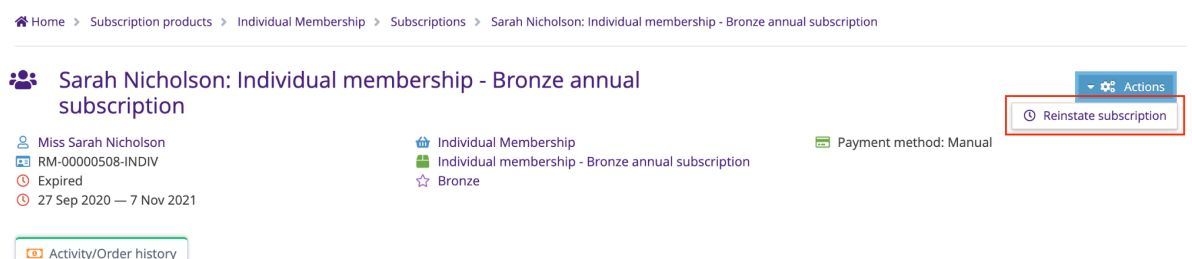
Reinstating an expired subscription

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**

[Home](#) > [Subscription products](#) > [Individual Membership](#) > [Subscriptions](#) > [Sarah Nicholson: Individual membership - Bronze annual subscription](#) > [Reinstate subscription](#)

 **Reinstate subscription** » [Sarah Nicholson: Individual membership - Bronze annual subscription](#)

Renewal date *

[Back](#) [Save](#)

- 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.

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

[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
 RM-00000689-INDIV
 Active (Renewable)
 27 Oct 2021 — 5 May 2022

 Individual Membership
 Individual membership - Bronze bi-annual subscription
 Bronze
 Package on renewal: Fixed annual plan and grade, Bronze

 Payment method: GoC
 Renewal order: ORD-05

Actions

-  Edit dates/membership no
-  Download certificate
-  Cancel renewal grade switch
-  Cancel subscription
-  **Cancel mandate**

- Confirm you want to cancel
- 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.*

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.

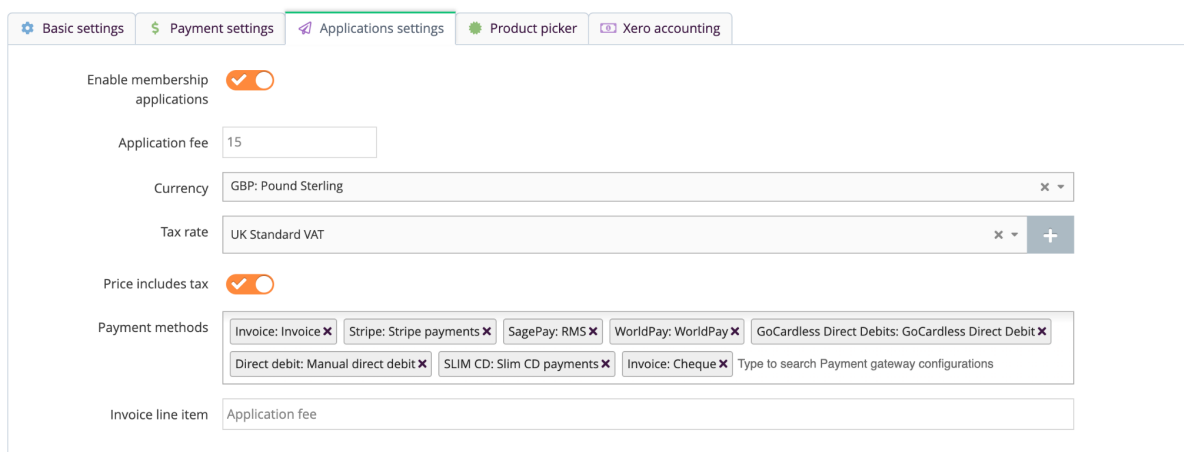
An application process works in a similar way, however there is an administrative step once all the information has been submitted by the user. The administrator then performs any checks and processes to validate the information submitted, and on approval they will typically confirm the subscription 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'



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 65**

Search Membership application...

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.

Home > Subscription products > Individual Membership Applications > Professor X Man

Individual Membership Application for Professor X Man Approve Reject

Class: Standard Professor X Man
 Grade: Titanium prof.x@xman.com
 Date applied: 24 May 2022
 Application status: Pending

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

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.