

Setting up a Periodic Payments Membership Product

For participants who would like to begin a payment plan, this product type is particularly useful as a subscription product. This subscription can be terminated at any time by the participant who is paying for it, or by the entity administrator.

To being, access your entity home, and then 'Products'

Abbotsleigh Swimming Club				
Logo				
No logo uploaded		Members	Approvals	Messages
	Upload ᆂ			\$
Oetails		Events	Coaching	Purchases
Entity Contact Phone				
0423 755 961				
Abbreviation for Meet		Documents	Reports	Products

Select Product +

	otor
Product Selec	CIO
Select Product	Products Report
Q Search	All Type
ABCDEFGHI	IJKLMNOPQRSTUVWXYZ
A B C D E F G H I Name∧	IJKLMNOPQRSTUVWXYZ Sale Show Hom
	Sale Show Hom
Name 木	Sale Show Hom



Fill in the product details including Product Type, Product Name, and Payment Type and ensure that the 'Component Only' is toggled ON for items such as memberships. You will be able to choose between a weekly, monthly, quarterly, biannual or annual payment when setting up the product.

Add Pro	duct			Products 📻
	Detail		ummany	
	Product Details			
	Product Type * Membership	Product Name * Membership periodic payment		
			27 of 100	
	Config			
	Component Only	Hide From Requirement Lists		
	Payment			
	Payment Type * Monthly Payment			

Select Next

Product Type * Membership	Product Name * Membership periodic payment
	27 of
Config	
Component Only	Hide From Requirement Lists
Payment	
Payment Type * Monthly Payment	

Select Save if happy with the settings for your product.



Add Pro	oduct		Products TP
	Detail	Summary	
	Please Confirm		
	Product Type	Product Name	
	Membership	Membership periodic payment	
	Config		
	Component Only	Hide From Requirement Lists	
	~	×	
	Payment		
	Payment Type		
	Monthly Payment		

Fill in the description and Product name and enter in a cost price for the product. Please note; Refunds Allowed CANNOT be toggled ON, due to the nature of the product as a periodic payment.

Product Ed	it			Product Home
r roudot Ed	Edit Membership periodic payment			
	Description Monthly instalments for members who may no	of wish to pay fees upfront		
			69 of 100	
	Product Name * Membership periodic payment	Product Short Name		
		27 of 100	0 of 100	
	Config			
	Refunds Allowed	Hide From Requirement Lists		
	Costing			
	Cost Price exGST			
	30	Margin on Cost		
	Margin is Percentage	GST Payable		
	Constraints			

Once details have been entered, select 'Save'

Costing		
Cost Price exGST 30	Margin on Cost	
Margin is Percentage	GST Payable	
Constraints		
Minimum Eligible Age	Maximum Eligible Age	



Before publishing the product, ensure that you have attached the relative Components to it from both the Region and State. To do this, access the Comps tab.

				Product Selector
Membership periodic payment	\$30.45 *	Reqs 🗹	Docs 🖪	Comps #
Availability 🔁 Clone 🖓	Replacement +) Edit 🕼	Document Require	ments	
		Q Search		Document +
Description				
Monthly instalments for members who	may not wish to pay fees upfront.	Category	Туре	₽ 0
Product Type			No Records to Display	
Membership				
Config				
Refunds Allowed	Component Only	Accreditation Requ	irements	
×				
Shows as Card		Q Search		Accreditation +
X				
		Accreditation		Û
Costing			No Records to Display	
My Entitlement exGST	Bundled Components exGST			
\$30.00 AUD	\$0.00 AUD			
	GST Payable			

Select Component +

Reqs 🗹	Docs 🚀	Comps 🚠
Product Component	S	
Q Search		Component +
Bundle Components		Cost exGST 🛍
	No Records to Display	-
Inherited Requirements		
Document Requirem	ents	
Category	Ту	rpe
	No Records to Display	
Accreditation Requir	rements	
Accreditation		
	No Records to Display	



Select the compatible component, and then select 'Next'

ompatible Components	Monthyl subscription te	est Preview
Search	Product Type	
Search	Membership	
B C D E F G H I J K L M N O P Q R S T U V W X Y Z Ø	Config	
	Refunds Allowed	Component Only
lame	×	×
Ionthyl subscription test	Shows as Card	
7)	×	
Items per page: 10 💌 1 - 1 of 1 < < > >	State	
	Show in Catalogue	Published Date
× Cancel Next >	×	28-02-2020
\sim	Costing	
	GST Payable	
	×	

Select Confirm

Component Inherita	nce	Product 🕞 🔦
	Confirm Component Inheritance	
	Component Name	
	Monthyl subscription test	
	Component Description	
	Component Cost	
	\$5.10 AUD exGST	
	Confirm	

To publish the product, select Availability

Product Home			Product Selecto
Membership periodic payr	nent \$36.13 *	Reqs 🐼 🛛 Docs 🖈	Comps 🚠
Availability 🔁 Clone 🛱	n Replacement 🜒 Edit 🕼	Product Components	
Description		Q Search	Component +
Monthly instalments for member	s who may not wish to pay fees upfront.	Bundle Components	Cost exGST 🗇
Product Type		Monthyl subscription test	\$5.10 🛍
Membership Config		Total Components Cost	\$5.10
Refunds Allowed	Component Only	Items per page: 10 👻	1-1of1 < < > >
Shows as Card		Inherited Requirements	
Costing		Document Requirements	
My Entitlement exGST	Bundled Components exGST	Category	Туре
\$30.00 AUD	\$5.17 AUD	No Records to	Display
Cost Price exGST	GST Payable		



Enter in an availability Start date. We would recommend setting this as the beginning of the season. The availability finish can be left blank, as this is just set as the length of time that the user can view the product to purchase in the Catalogue (not how long the subscription runs for). Select Save once these details have been entered.

ouuci A	Availability Edit	A contract the		Product Home
	Membership periodic payment.	Availability		
	Availability Start 1/10/2019	Availability Finish	۲	
	Published Date	🗈 👥 Show in Catalogue		
	* Cancel		Save 🖺	

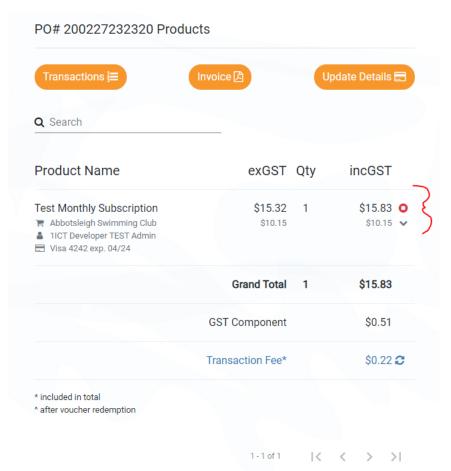
Select Continue

	Are You Sure? ×	
	This product will be made available for purchase. Membership periodic payment	
dic pa	Products which include a payment schedule will be locked; preventing further editing.	
	★ Cancel	

The Product will now be published. The user should now be able to purchase the product via the catalogue.



To cancel the subscription, select the red 'stop' icon next to the product in Product Purchases.



Select Continue

Cancel Subscription	×
Are you sure you want to cancel this Subscription? Test Monthly Subscription	
× Cancel Continue	

The subscription will now be cancelled.



FAQs

1. The Member transfers clubs. What happens to remaining club funds?

Periodic memberships are not transferred, they can be started and stopped whenever a participant is ready to move; there is no refund on payments made to date.

2. The member and club both agree that the member can leave without paying the remainder: can this only be fixed via a 'Force Expire'?

There is currently no contractual obligation supported by the system, however this may be a future inclusion. Subscriptions remain active until the end of the current cycle when cancelled.

3. What happens if payments have failed for subscriptions?

A delinquent flag has been created to identify subscriptions whose payments have failed. Card details can be updated tp reinstate their subscription. On first purchase, users will have 7 days grace before the subscription access is removed, if they fail to meet either document or certification requirements.