Create A Plan

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Go to **Plans** and then select *Create Plan*.

By default, all plans will be in US Dollars (USD). Suppose your account is configured to transact in other currencies. In that case, you can use the Profile ID selector to choose a billing currency for your plan. Each plan is limited to one currency, so you will need to create additional plans if you wish to bill customers in multiple currencies.

To create a plan, complete the information indicated in the **Create a Plan Fields Table** below and select *Create*.

Create A Plan Fields

Option	Syntax	Required/Optional	Comments
Profile ID	N/A	Required if more than one profile exists.	If you have more than one payment profile, you'll need to select a profile for the plan. You will not see a profile selection option if you only have one profile.
Plan Code	16 Alphanumeric	Required	You can use this plan code for your product code or SKU number for reconciliation purposes.
Plan Name	64 Alphanumeric	Required	Create a plan name that you can use for your records. The transaction date and the plan name will populate the Purchase ID on the subscription transaction.
Plan Description	200 Alphanumeric	Optional	Use this field to describe the plan for your internal records. The content of this field is not shared with your customer.
Plan Amount	10 Numeric	Required	The amount you would like to charge your customer.
Plan Frequency	N/A	Required	Indicator for how often you want to bill your customer. Choose from *Daily*, *Weekly*, *Bi-Weekly*, *Monthly*, *Quarterly*, *Bi-Annually*, or *Annually*. You can select the number of weeks or months between cycles for weekly and monthly plans. If you would like to bill your customer on the same day each cycle, use the *A Specific Day* selector. If you would like to bill your customer on their subscription creation "anniversary date," use the *Subscription Start Date* selector.
Plan Duration	N/A	Required	If you are selling on an installment plan, set a fixed duration. If you are selling an ongoing subscription, select *bill until canceled*. Your customer will be billed until you cancel the subscription.

Option	Syntax	Required/Optional	Comments
One Time Fee	10 Numeric	Optional	Enter the amount if you charge a setup or one-time fee when the subscription is created. Your customer will be billed this amount when the subscription is created.
% Surcharge	1 Numeric	Optional	Only available if the account is approved for surcharging. If you are approved for surcharging, enter the % to be added to the transaction total. The surcharge percentage cannot be over 4%. See surcharge rules for more information.
Begin Billing On	N/A	Required	Options for when would you like to start the subscription billing. The options available are Subscription Start Date and A Specific Day. If A Specific Day is selected, additional fields will appear. A required drop-down field to select the date of the month you would like to start the subscription and the optional field to select if you would like to prorate the first charge of the subscription. The prorated amount for the subscription can be calculated or can be a fixed amount.

Trial Fields

Option	Syntax	Required/Optional	Comments
Trial	N/A	Optional	Check this box to delay the first billing date in the subscription billing cycle. If you wish to offer a free trial and introductory periods, you'll need to adhere to Visa and MasterCard rules.
Trial Amount	10 Numeric	Optional	Suppose you charge an amount different from the regular billing amount during the trial period. In that case, you can add that amount here.
Trial Duration (# of billing cycles)	4 Numeric	Optional	Field to indicate the length of your trial period. The trial duration will match the subscription frequency. For example, your trial period will be monthly if your plan frequency is monthly. If you set your trial duration to 10, your trial will be for ten months. Regular billing per subscription settings will begin at the end of the trial period.
DBA Suffix	N/A	Required	The cardholder will see this suffix appended to your merchant statement descriptor of the first transaction processed after the trial period has ended.