

Create A Subscription

Last Modified on 06/12/2023 11:09 am PDT

There are two ways you can create a subscription.

The first way is from the **Subscriptions** menu:

1. Click the **New Subscription** button.
2. Click on the **Choose a Customer** field. Begin typing either the *Customer ID* or *Customer Name* to locate your customer.
3. Select the date you would like the subscription to start. The subscription start date will be at least one day after today.
4. To create an on-plan subscription, set the **Use Plan?** toggle to yes. Begin typing the *Plan Code* or *Plan Name* in the **Choose a Plan** field to locate a plan for this customer.
5. To create an off-plan subscription, set the **Use Plan?** toggle set to no and configure the subscription settings. Specify the *Profile*, *Frequency*, *Bill Until Canceled*, *Amount*, *One Time Fee*, *% Surcharge*, and *Description* fields. A list of the options with their definitions is in the table below.
6. Once you've selected a plan or entered off-plan subscription options for the customer, click **Create Subscription**.

The second way to create a subscription is from the Customer menu:

1. Select a customer
2. Click the **New Subscription** button.
3. Select the date you would like the subscription to start. The subscription start date will be at least one day after today.
4. To create an on-plan subscription, set the **Use Plan?** toggle to yes. Begin typing the *Plan Code* or *Plan Name* in the **Choose a Plan** field to locate a plan for this customer.
5. To create an off-plan subscription, set the **Use Plan?** toggle set to no and configure the subscription settings. Specify the *Profile*, *Frequency*, *Bill Until Canceled*, *Amount*, *One Time Fee*, *% Surcharge*, and *Description* fields. A list of the options with their definitions is in the table below.
6. Once you've selected a plan or entered off-plan subscription options for the customer, click **Create Subscription**.

Note: A customer can have more than one subscription. The customer must have a default card stored in **Customers** before you can create a subscription. If you delete a customer with an off-plan subscription, all plans associated with that customer will get canceled.

Off-Plan Subscription Options

Option	Syntax	Required/Optional	Comments
Profile	N/A	Required if more than one profile exists	If you have more than one payment profile configured, you will need to select the appropriate profile for the plan. If you only have one profile configured, you will not see this option.
Amount	10 Numeric	Required	The amount you would like to charge your customer.

Option	Syntax	Required/Optional	Comments
Frequency	N/A	Required	Select how often you would like to bill your customer. Select either <i>Weekly</i> , <i>Bi-Weekly</i> , <i>Monthly</i> , <i>Quarterly</i> , <i>Bi-Annually</i> , or <i>Annually</i> .
Duration	N/A	Required	Set a fixed duration if you are selling on a fixed installment plan. If you are selling an ongoing subscription, select <i>bill until canceled</i> . Your customer will be billed until you cancel the subscription.
One Time Fee	10 Numeric	Optional	The customer is charged a one-time set-up fee immediately when the subscription is set up.
% 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 3%. See surcharge rules for more information.
Description		Optional	Add a description of the subscription for future reference.