

Step 5: Setting Up Subscriptions

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Quick Steps: Subscriptions > Subscriptions Types

1. Within the Management Console, select **Subscriptions** from the top menu, then **Subscription Types** from the left menu
2. Select **Add** at the top of the page
3. Complete all relevant fields for the new subscription type. Any fields marked with a red dot are required fields and must be completed

General

- **Title:** Enter the title of the Subscription Type
- **Detail:** An optional description of the Subscription Type. This could include any benefits offered as part of the membership or what it entails.
- **Subscription Category (Single Tier Only):** an extra way to categorise your Subscription Types visually on the front end (portal) of the system.
- **Amount:** The amount for the subscription type.
- In a tiered database, there will also be fields for the other levels associated with that structure, most commonly seen would be National, State, Club. This allows to split your total amount over these three levels.
- **Payment Terms:** How many days the member has to pay their fee. It must be noted that the system does not enforce these terms.

- **Syndicate (Tiered organisations only):** Copies all information from the primary organisation down to the linked organisations. This information can only be changed at the primary level. Select Yes to syndicate a subscription type.

Financial Status

- **Update Option - No:** Member record displays as unfinancial when the subscription is processed.
- **Update Option - Yes - Financial End Date:** Member record displays as financial until the selected end-date when the subscription is processed.
- **Update Option - Yes - Period:** Member record displays as financial for a selected period of time when the subscription is processed.
- **Update Option - Yes - Days:** Member record displays as financial for a selected number of days when the subscription is processed.

For the options of Period and Days, the Financial Base Date refers to when the new financial end date will be generated from.

- **Current Date:** The financial end date will be based off the stipulated period or days from the current date.
- **Member Financial End Date:** The financial end date will be based off the stipulated period or days from the member's current financial end date.

Member

- **Include Subscription In Member's Section / Member's Portal:** The switch controls whether subscription type displays on the front-end Member Portal.
- **Member Types Default:** The default Member Type selected for the respective Subscription Type.
- **Single-Multiple:** Select whether the subscription type is for one individual member or more than one member. If the subscription type is for more than one member select **Multiple** and then the total number of members
- Eg. Family 2 Adults and 2 Juniors - Select 4 members. See article [Setting Up Multiple Subscription Types](#) for further information.

Age Validation

Select whether there is validation required.

If Yes, select the **Date of Birth Range** applicable or an **Age range**

Declaration

An additional declaration can be added to your subscription type that is applicable to only that particular subscription type. This would usually be used for under age members, whereby you can also select whether **Guardian Approval Required**

Invoice and Receipt

In the invoice and receipt tabs, you have the option to choose between the following options:

- **Invoice or Receipt Only - No:** A customised invoice or receipt is sent to members. Insert additional information into the text editor field.
- **Invoice or Receipt Only - Yes:** A standard invoice or receipt will be sent to members, generated by the STG System.

Auto Reminder

- **No** - No reminder will be sent.
- **Yes** - Reminder will send an email to a member when their membership is close to expiring.
- **Yes** - New Account will create a new account for your member to pay off at this point.

If either of the Yes options are selected, choose the amount of days before expiry you would like the email sent.

Give the email a Subject line and complete the Detail of the email.

Other Options

The only option to take note of in this tab is the **Order** field. Place a number from 1 to X to order your subscriptions on the front end (portal).

4. Once these options have been completed, click **Save**

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