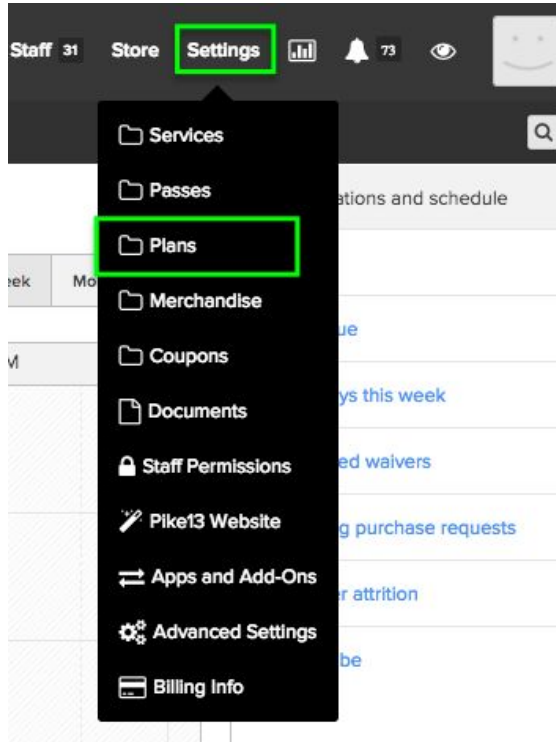
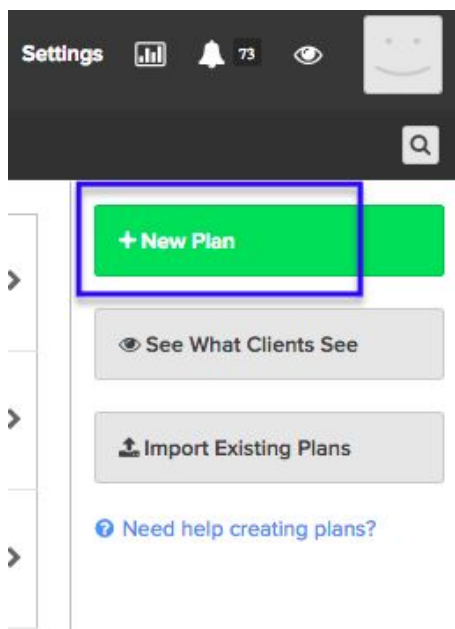


Creating Prepaid Plans

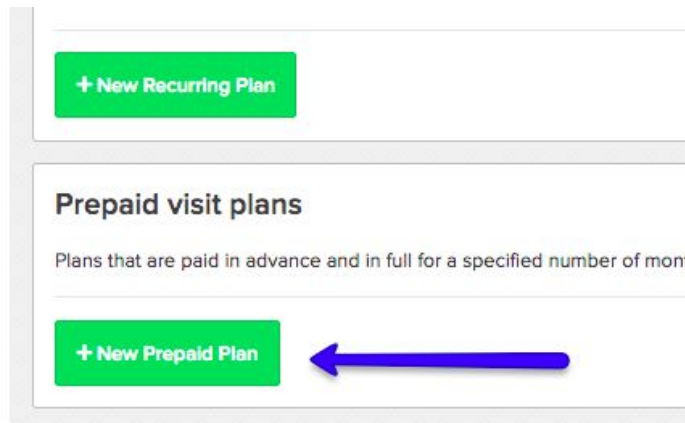
Go to Settings - Plans:



Select + New Plan:



Choose New Prepaid Plan:



Enter the required information. You can edit details and add more information at a later time:

New Prepaid Plan

1. Basic info

* **Name**

Short description
Shown to clients on your Pike13 website in the list of all your plans and passes

Full description
Shown to clients on your Pike13 website on the details page for this plan

* Length of plan

Make sure you update this to reflect the correct prepaid term.

Your terms and conditions are specific to purchases. You may have different verbiage for prepaid plans over your recurring monthly plans. You can choose to use a checkbox or an electronic signature if you have a DocuSign account. The benefit of the signature is that the document will be placed in the client's profile if you need to access it in the future.

Terms and conditions

Shown to clients when they purchase this product

B *I* U ☰

For electronically signed Terms, Pike13 provides the client's name, the product name, price, duration of plan, and purchase date.

You can always come back and fill this in later.

Are clients required to accept the terms and conditions?

No

Yes

How do clients accept the terms and conditions?

Checkbox

Electronic signature
An electronic document is created automatically and contains the terms and conditions, purchase date, price, discounts, and payment information.

Is acceptance required to complete checkout?

Applies to purchases made by clients on your Pike13 website. When a staff member sells a pass or plan to a client, the client is automatically notified that they need to accept the terms and conditions.

No Clients are notified *after* purchase that they're required to accept the terms and conditions.

Yes Clients are required to accept the terms and conditions before they can check out on your Pike13 website.

Requirement for online purchases only

Next Step → **× Cancel**

Enter the price and revenue category, then select Next Step:

Price

\$ ←

Choose applicable taxes

Sales Tax

Revenue category

Choose one ▾

Next Step → ← Previous Step **× Cancel**

Is there a limit to how often clients can use this?

No Select No for unlimited plans.

Yes

Limit use to
 visits per

Can unused visits roll over to the next week?

No

Yes

Maximum number of visits that can roll over into the next week
Must not exceed visit limit per week
 ←

If you select yes, you can determine how many visits they are allowed per week or month and whether any rollover to the next period.

Determine whether this plan makes someone a “member”:

Are clients who buy this considered members?

No

Yes

Decide who if anyone can purchase this plan online:

Who can buy this on your Pike13 website?

Clients and members can buy this

Only members can buy this

No one (only staff members can sell it)

Plan Holds can only be set up by staff members; clients cannot place their plans on hold. You can disable this function altogether if you wish. If you allow them, you can create a hold fee and a max period of time for the hold:

Plan holds

Holds can be placed on this plan

One-time hold fee

\$

Maximum length of hold

None

At most months

Once you create the plan, you will see a list of services you have created populate. Select the services this plan pays for:

 **Edit First Month Promo** Prepaid Plan

Plan created

- Level 1 Appointments
- Personal Training Staff-Specific Pricing
- Weightlifting Class 
- Physical Therapy Appointments

- Private Training Appointments

- Birthday Party Birthday Parties

- Drop in for Courses Courses

- Pilates - Advanced Classes 



