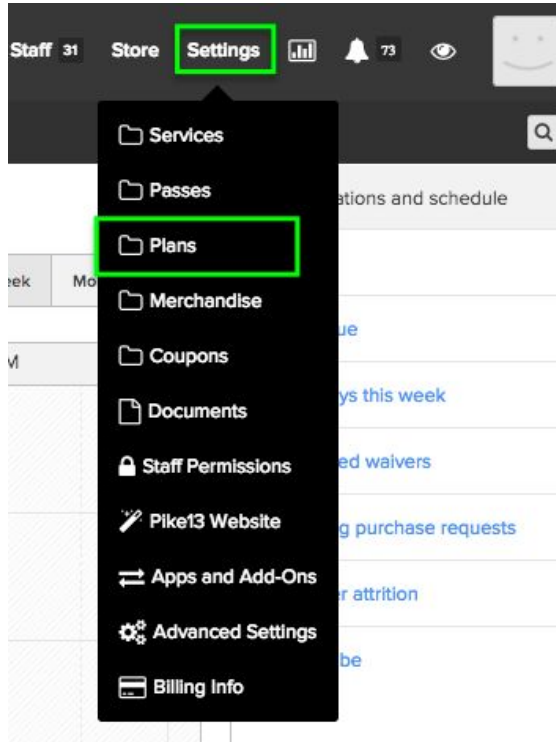
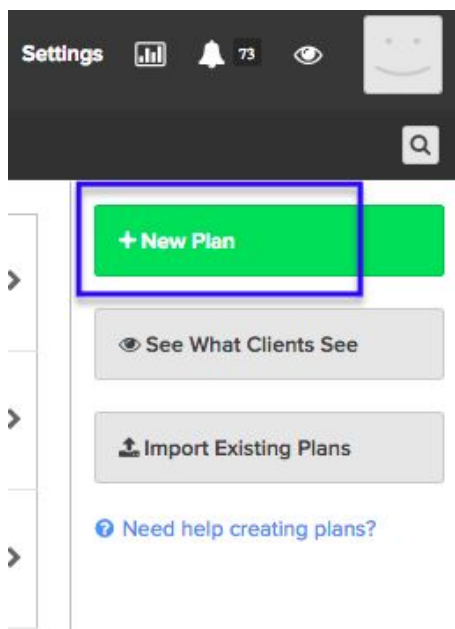


Recurring Plans

Go to Settings - Plans:



Select + New Plan:



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 in the price per payment and signup fee if applicable:

1. Basic info

* Price per payment

\$



Choose applicable taxes

Sales Tax

Signup fee

\$

Optional - this is a one-time fee.

This fee is tax exempt

What billing cycle?

Weekly

Monthly

Yearly

Bill how often?

Every 1 month(s)

When are payments due?

Payments are due on day plan starts
For example, if plan is sold on the 3rd, but plan starts on the 15th, payments are due on the 15th.

Payments are due on set day of the month
For example, no matter when the plan is sold, payments are due on the 1st.

Payments throughout the month

All payments are due on a specific day every month.

Bill on what day of the month?

1

Revenue category

Choose one

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

The next step will have you set up restrictions if applicable.

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

Does this plan have a required number of payments?

No

Month-to-month plans

Yes

How many payments are required?

Contractual plans.

End plan after the last required payment?

When purchased the plan's end date will be set to the last required payment's paid through date.

No

Yes

If you require a new contract to be signed every 12 months, you will select yes to having the plan end after the last required payment.

Cancellation fee

To cancel early, clients must see a staff member. Clients can't cancel early on your Pike13 website.

\$

The early cancellation fee must be a dollar amount. Place in the most you may charge for cancellation. You can adjust it if necessary when the plan has been cancelled.

Is this fee tax-exempt?

No


Yes

Select whether your clients can cancel their plans online.

Can clients cancel their plan online?

Clients can cancel after payment commitment has been met.

Yes

No 

If you select No, you can edit the verbiage your clients will see if they try to cancel online:

No

What is the cancellation policy?



B *I* U ☰

If you want to cancel before making all required payments, please talk to a staff member.

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 

 Save

 Cancel