

Create A Subscription

Last Modified on 03/08/2022 2:12 pm PST

There are two ways you can create a subscription.

The first way is from the **Subscriptions** menu. Follow these steps:

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 Cancelled*, *Amount*, *One Time Fee* 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. Follow these steps:

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 Cancelled*, *Amount*, *One Time Fee* 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	NA	Required if more than one profile exists	If you have more than one Qualpay 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.

Option	Syntax	Required/Optional	Comments
Amount	10 Numeric	Required	The amount you would like to charge your customer.
Frequency	NA	Required	How often you would like to bill your customer. Select either Weekly, Bi-Weekly, Monthly, Quarterly, Bi-Annually, or Annually.
Duration	NA	Required	If you are selling on a fixed 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.
One Time Fee	10 Numeric	Optional	The customer is charged a one-time set-up fee immediately when the subscription is set up.
Description		Optional	Add a description of the subscription for future reference.