

Membership plans

09/25/2024 12:41 pm PDT

Membership plans provide [admins](#) complete control and flexibility to collect recurring membership payments. Admins can create as many membership plans as needed to meet their members' needs.

Membership plans can either be visible to members, or hidden. Members can view and select between all visible membership plans. Hidden membership plans require an admin to add a member. Hidden membership plans can be used for special, restricted pricing or VIP members.

Each membership plan can be customized:

- Name
- Description
- Price
- Initiation fee (one-time charge added to the first payment)
- Frequency (monthly, quarterly, annually)
- Visibility
- Admin approval (requires an [admin](#) to approve members on that plan)

For annual membership tiers, paid members will receive an [email](#) and [push notification](#) reminder 30 days before their annual billing period renews.

Admins re-arrange membership plans by long-pressing the plan and re-ordering.

There is no limit to the number of membership plans; however, the Heylo team recommends no more than 3 visible plans to avoid member confusion. Membership plans can be added anytime, even after the membership is launched.

To edit a membership plan, tap the plan in the membership plan section of the admin settings, and select "edit". Everything can be edited with the exception of price and frequency (see [increasing membership prices](#)). An admin can also delete a membership plan if no one is on that plan.

Each membership plan has a link that an admin can share to invite someone to the group on a specific membership plan or direct an existing member to pay for that plan.

Linking a role

[Roles](#) can be used to reward paid members. Roles grant access or privileges in the group such as private chat topics, private events, or discounts.

To link a role to a membership and grant benefits, add [arole](#) to your membership plan. When a member signs up for a membership, they are automatically granted the role and any benefits or privileges associated with it. If the member cancels their membership, the role is automatically

removed when their membership expires. The same role can be linked to multiple plans.

If the membership plan already has paid members, adding a role will apply to both current and future paid members.

Launching membership

To launch a membership, link the [bank account](#) and double-check the [membership plans](#). Once everything looks good, launch! Congrats, your membership is live!

Head over to your membership [analytics](#) to see who signed up.

Once launched, membership can be managed by moving members across plans. To get help unlaunching a membership, [get in touch with the Heylo team](#).
