

How to Set Up Membership Plans and Recurring Payments

Overview

Membership Plans let you define the tiers families choose from when joining your co-op. Each plan can have a name, a description, feature bullets, and an optional member limit. Once you save a plan it becomes active immediately and appears on your co-op's public membership page.

Separately, the **Membership Payment** page controls whether — and how much — your co-op charges at signup. A plan price and the membership payment settings work together: see Step 1 before you create your first plan.

Before you start: Your Stripe account must be connected under **Payouts & Billing** before you can collect any payment — a flat membership fee, a paid plan price, or both. Free plans with no fee do not require Stripe. See [Setting Up Stripe Payments](#) for setup instructions.

Step 1: Set Up How You Collect Payment

1. Sign in to your co-op admin panel.
2. In the left sidebar, click **Membership Payment** (listed just below **Membership Plans**).

Admin Membership Payment settings page

Configure three settings:

Setting	What it does
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Collect membership payment at signup	On (default): a family is sent to checkout before their application completes. Off: applications are accepted without payment.
Membership dues	A flat, one-time fee (in dollars) charged when a family joins without picking a priced plan. If a plan has its own price, the plan's price is charged instead of this fee.
Finish the application automatically when a family pays	Off (default): a paid application still waits in the Paid — Pending queue for manual approval, even though payment already cleared. On: a paid application is approved the instant payment clears.

If you leave the membership dues field blank and every plan is either free or has no price of its own, the page shows a warning — **"No family can be charged yet"** — because nothing is configured to charge. Set a membership dues amount here, a priced plan in Step 4, or both before you publish your enrollment page.

Step 2: Open Membership Plans

1. In the left sidebar, click **Membership Plans**.

Admin Membership Plans page — empty state

The page shows all your active plans. If you have not created any yet, it shows "No plans yet" with a **Create Plan** button.

Step 3: Create a Plan

1. Click + **Create Plan** (top-right) or the **Create Plan** button in the empty-state card.

The **Create Plan** modal opens.

Membership Plans page — click Create Plan to open the modal

2. Fill in the plan details:

Field	What to enter
Plan Name	Short, recognizable name (e.g., "Basic", "Family", "Premium")
Description <i>(optional)</i>	One or two sentences describing what the plan includes

Field	What to enter
Features <i>(optional)</i>	Bullet points shown to families on the enrollment page — click + Add Feature to add more
Member Limit <i>(optional)</i>	Maximum number of members allowed on this plan. Leave blank for unlimited.

Step 4: Set Pricing and Billing Intervals

Free plan

Toggle on **Free Tier** if families join at no cost through this plan. No Stripe connection is required for free plans. Skip to Step 5.

If you want a free-tier plan but still collect a flat charge, leave the plan's price unset and use the **Membership dues** fee from Step 1 instead — that fee applies whenever a family joins without a priced plan.

Paid plan

Leave **Free Tier** off. Under **Billing Periods**, enable one or more intervals:

- **Monthly** — families are billed every month
- **Semester** (6 months) — families are billed twice a year
- **Annual** — families are billed once a year

For each enabled interval, enter the price in dollars.

Processing-Fee Handling — choose how Stripe's processing fee is covered:

Option	What happens
Absorb <i>(default)</i>	Your co-op pays the processing fee. Families are charged exactly the listed price.
Gross-up	The processing fee is added into the displayed price. Families see one all-in amount.

You can mix intervals and fee modes — for example, offer both Monthly and Annual with different fee settings on each.

Coming soon: Checkout for a plan priced with a Monthly, Semester, or Annual billing interval isn't available yet — a family who selects one of these plans today hits a payment error instead of completing checkout. You can configure billing intervals now so they're ready when this ships, but until then, collect dues through the flat **Membership dues** fee (Step 1) paired with a Free Tier plan.

Step 5: Save the Plan

Click **Create Plan**. The plan saves and is immediately **Active** — no separate publish step is needed.

To edit a plan later, return to **Membership Plans** and click **Edit** on any plan card.

Step 6: How Families See and Enroll

Once at least one plan is active, families can visit your co-op's public membership page at:

<https://yourco-op.cooplyhq.com/membership/plans>

The page lists all active plans. If you offer multiple billing intervals (e.g., Monthly and Annual), a toggle at the top lets families switch between intervals to compare prices.

Family-facing Membership Plans page

Families click **Join Now** to begin a three-step application:

1. **Contact Info** — primary contact name, email, and phone number
2. **Household** — children and household details
3. **Membership** — plan selection, then payment (if anything is owed)

Family join form — Step 1: Contact Info

After completing the form, families are taken to Stripe Checkout to pay any membership dues or plan price that applies, or directly to a confirmation page if nothing is owed. As noted in Step 4,

checkout for a billing-interval-priced plan isn't available yet — keep your enrollment page limited to Free Tier plans plus the flat membership dues fee until that ships.

Step 7: View Membership Signups

To see who has applied or enrolled:

- 1. In the left sidebar, click **Membership Signups**.

Admin Membership Signups page showing status tabs

The **Membership Signups** page shows all applications with status tabs:

Tab	Meaning
All	Every application, regardless of status
Completed	Enrollment is finished and payment (if required) has been received
Submitted	Family submitted the application. This tab is based on status, not payment — a free or already-settled signup can land here too.
Paid — Pending	Payment received; awaiting admin approval (when "Finish the application automatically when a family pays" is off in Step 1)
On Hold	Admin has placed the application on hold for review
Rejected	Application was not approved
Draft	Family started but did not submit the application
Voided	An admin voided the application; it's no longer active
Abandoned	Family started and did not complete within the session

Click any row to view the full application details and take action.

What's Next

- **Signup Questions** — Add custom questions to the enrollment form: in the sidebar go to **Signup Questions**.
- **Coupons** — Create discount codes for your plans: in the sidebar go to **Coupons**.
- **Payouts & Billing** — View Stripe payouts and check your balance: in the sidebar go to **Payouts & Billing**.

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