

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 one or more billing intervals (monthly, semester, or annual). Once you save a plan it becomes active immediately and appears on your co-op's public membership page.

Before you start: Your Stripe account must be connected under **Payouts & Billing** before you can create paid plans. Free plans do not require Stripe. See [Setting Up Stripe Payments](#) for setup instructions.

Step 1: Open Membership Plans

1. Sign in to your co-op admin panel.
2. In the left sidebar, click **Membership Plans**.

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Membership Plans

Define membership tiers and pricing for your co-op

+ Create Plan

Show archived plans



No plans yet

Create your first membership plan to get started.

+ Create Plan

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 2: Create a Plan

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

The **Create Plan** modal opens.

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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
Features <i>(optional)</i>	Bullet points shown to families on the enrollment page — click + Add Feature to add more

Step 3: Set Pricing and Billing Intervals

Free plan

Toggle on **Free Tier** if families join at no cost. No Stripe connection is required for free plans. Skip to Step 4.

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.

Step 4: Set Optional Limits

Scroll down in the modal to configure optional settings:

Field	What it does
Member Limit <i>(optional)</i>	Maximum number of members allowed on this plan. Leave blank for unlimited.
Requires Application	When on, each signup must be manually approved by an admin before the family gains access.

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.

Mountain View ExplorersJoin Now

Membership Plans

Join Mountain View Explorers. Choose a membership plan that works for your family.

No membership plans are currently available. Please check back soon.

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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 and billing interval selection, then payment

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Join Our Co-op

Complete your membership application to join Mountain View Explorers.

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Contact Info Household Membership

Primary Contact
Tell us about the primary guardian or parent for your family.

Full Name
Jane Smith

Email Address

We value your privacy
We use a small set of strictly-necessary cookies to run the site (sign-in, security). With your permission we also use first-party analytics to understand how the site is used. You can accept all, reject all, or pick categories. Change your choice any time from the "Cookie preferences" link. [Read our Privacy Policy](#).

[Manage preferences](#) [Reject all](#) [Accept all](#)

After completing the form, families are taken to Stripe Checkout to pay (for paid plans) or directly to a confirmation page (for free plans).

Step 7: View Active Memberships

To see who has applied or enrolled:

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

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Membership Signups

View membership signups and their status

All 0

Completed 0

Awaiting Payment

Paid — Pending

On Hold

Rejected

Draft

Abandoned

APPLICANT

SEATS

STATUS

SUBMITTED

No applications

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

Tab	Meaning
Completed	Enrollment is finished and payment (if required) has been received
Awaiting Payment	Family submitted the form but has not yet paid
Paid — Pending	Payment received; awaiting admin approval (when "Requires Application" is on)
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
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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