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Setting up a Subscription Plan

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2 years ago · Updated

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Introduction

Subscriptions in SMRT allow you to bill the customer a fixed monthly amount, giving them a specific promotion such as x free dry cleaning items monthly. You can have multiple subscription plans, but a customer can only be assigned to one plan at a time. While the normal use case for subscriptions is auto pay customers, it can also be used by statement customers. Subscriptions are debited to the account the same day every month, the day which the subscription originally got activated. Currently subscriptions can only be managed in the POS, but there are plans to allow the customers to self manage the plans through the mobile customer interface. Follow the below steps for each subscription plan you'd like to activate.

Promotion setup

A subscription plan is linked to a promotion, which is added to the account after the plan is activated. Before we can setup the plan, here's a guide for how to setup a promotion which gives the customer 10 wash and fold monthly.

Help

1. Open SMRT, go to Settings => Promotion => New Promotion

2. Give the subscription promotion a name, e.g "Wash & Fold Subscription", and optionally enter a description.

3. Fill in the "Maximum uses per customer" to 10, and "Restrict promotion by timeframe" to **Subscription Billing Cycle**, to restrict usage of the promotion to 10 times per calendar month. This gives the desired effect of the 10 bags free wash and fold monthly:

   Name
   | Wash & Fold Subscription |

   Description
   | 10 bags of wash and fold every month |

   Restrict to agents
   | Select agents |

   Billing Code
   | |

   Minimum access level required to apply promotion
   | Production ▾ |

   Maximum uses per customer
   | # | 10 |

   Maximum discounted amount
   | $ | ∞ |

   Restrict promotion by timeframe
   ☑ | Subscription Billing Cycle ▾ |

4. In the next section, disable usable as coupon, and enable usable as a customer discount:

   ☐ Usable as a coupon

   ☑ Usable as a customer discount

   Days valid after attached to customer
   | # | ∞ |

   Coupon code
   | |

   ☐ Attach automatically to new customers
   ☐ Only valid on first order for new customers
   ☐ Visible on customer website
   ☐ Allow customer to set themselves

5. Add an activation requirement, the promotion should only be applied for wash & fold orders. First press "Add requirement", then select "HAS", "Departments", "Wash & Fold" as shown below:

   | Promotion | Add override |

   Activation Requirements   These requirements need to be fulfilled in order for the promotion to be applied to an order. No such requirements exist by default.

   ✕ | HAS ▾ | ✕ | Departments ▾ | | Wash & Fold × |

   ➕ Add another restriction

   ➕ Add requirement

6. set a discount effect of 100%, and ensure it only applies to wash and fold, by pressing add requirement in the discount effect section as shown below:

7. That's it, save the new promotion in the bottom right of the page.

Subscription Plan setup

After you've setup the promotion, you must now setup a subscription plan / item type, and link it to the promotion created in the previous step. This sets the price of the subscription, and ensures that when activated the right promotion is added to the account.

New Item-Type   ✕

2   **Name**   Wash & Fold Subscription

3   **Category**   Retail   ⌄

    Department   Miscellaneous   ⌄

    Item Image   Undetailed   ⌄

4   **Type**   ○ Retail   ○ Gift card   ⦿ Subscription

5   **Promotion**   Wash & Fold Subscription   ⌄

6   **Description**

7   **Price**   179

8

Close   **+ Add**

1. Open Settings => Detailing Pricing => Item Types => Add new in the top right

2. Name the subscription. This name will be show in the POS when selecting a subscription plan.

3. Under category, select **Retail**

4. A new retail type section should appear. Select **Subscription**

5. Select the promotion you created in the previous section, in our example Wash & Fold Subscription

6. In addition to the name entered in 2, you can optionally further describe the subscription plan to the user in the POS.

7. Enter the monthly price for the subscription (in our example, $179 per month)

8. Press Add to save the new Subscription Plan.

Using the subscription plan

As previously mentioned, any time a plan is activated, the customer will get the linked promotion added to their account. If the customer leaves the plan, the promotion will be removed from the account automatically, at the end of their monthly billing period when the subscription usually renews. However, if the customer change plan, the old promotion will be replaced by the new one immediately, taking effect on any future order. As far a billing, the system automatically prorates the amount due when moving between plans. This is how you activate the subscription on the account:

1. Open the customer in the POS
2. Click the customer's name to go to their profile, and then the subscription tab.
3. Click the subscription plan you just created, then press **select** to activate it:
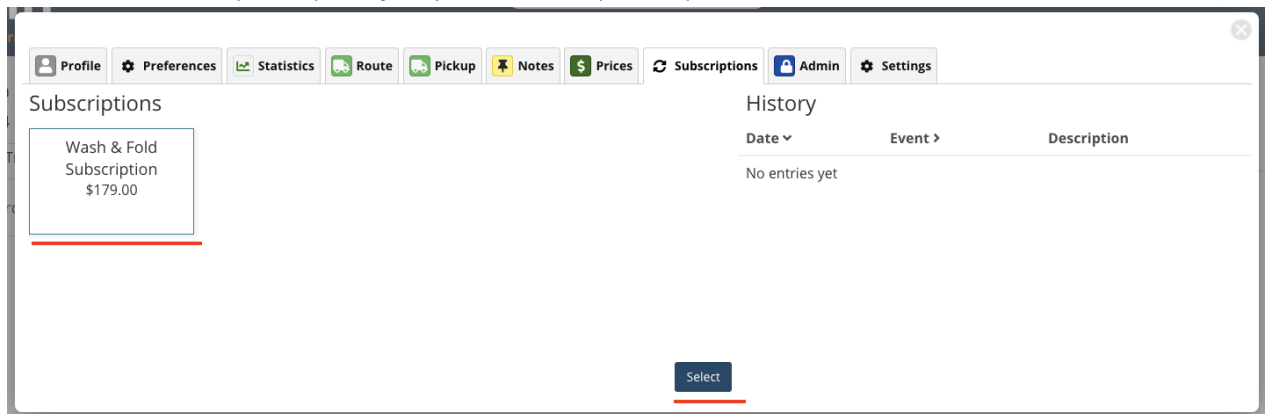
4. To fully activate the subscription, the customer must pay for their first subscription month (unless the customer is a statement customers). In SMRT, this monthly charge is represented by a retail order on the account. The payment box opens, prompting the user to add a card on file for the customer and pay their for this order:

ID	Date	Pieces	Amount
✔ 21011-801	01/11	1 🖨	$194.22

Payment Amt / Deposit:

194.22 ✔

💳 VISA · MasterCard · AMERICAN EXPRESS · DISCOVER

4111 1111 1111 1111

12 / 23

☑ Save as Card on File

Subtotal:	$179.00
Tax:	$15.22
Amount Due:	$194.22

Cash

Check

Card

Claim Gift Card

Pay

👤 Profile · ⚙ Preferences · 📈 Statistics · 🚚 Route · 📦 Pickup · 📌 Notes · 💲 Prices · 🔄 Subscriptions · 🔒 Admin · ⚙ Settings

Subscriptions

Wash & Fold
Subscription
$179.00

Pending

History

Date ⌄	Event ›	Description
1/11/2021 10:14am	Selected	Wash & Fold Subscription was selected by Admin

5. As long as a card on file was added to the account, recurring billing will be handled automatically. After submitting payment successfully, the subscription is activated, and future orders will receive the subscription as seen in below example receipt. It should also be noted, that If the card is declined in the future, the customer will be notified by email. CSRs and drivers, will also get alerts in the POS that there are unpaid orders on the account. However, the subscription will continue to be active until you press the cancel button as shown at the bottom of the screen below:

👤 Profile · ⚙ Preferences · 📈 Statistics · 🚚 Route · 📦 Pickup · 📌 Notes · 💲 Prices · 🔄 Subscriptions · 🔒 Admin · ⚙ Settings

Subscriptions

Wash & Fold
Subscription
$179.00

Active

History

Date ⌄	Event ›	Description
1/11/2021 10:15am	Activated	Wash & Fold Subscription was activated
1/11/2021 10:14am	Selected	Wash & Fold Subscription was selected by Admin

Cancel

Invoice					
Monday 01/11/21 10:16am				Print	
Ref: 21011-826					
John Doe				Drip n' Dry Cleaners	
				1844 Belles St	
1844 BELLES ST				San Francisco, CA 94129	
SAN FRANCISCO, CA 94129-1805					

Drip n' Dry Cleaners

Barcode	Type	Description	Count		Subtotal
0000	Wash & Fold	5.5 lbs	1 pc		0.00
			Original price:	5.50	
			Discount:	5.50	

Subtotal:		0.00
Promotions Applied:		Wash & Fold Subscription
Total:		0.00

All amounts in United States Dollars (USD)

6.

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