Creating a Subscription Plan

PayPal · https://websbyamy.com/support/docs/creating-a-subscription-plan/

CLICK HERE to watch the video on how to create a PayPal button that will allow you to create a subscription plan (continuous or limited time).

The only thing you need is a Business PayPal account. It is a free upgrade.

Things to keep in mind:

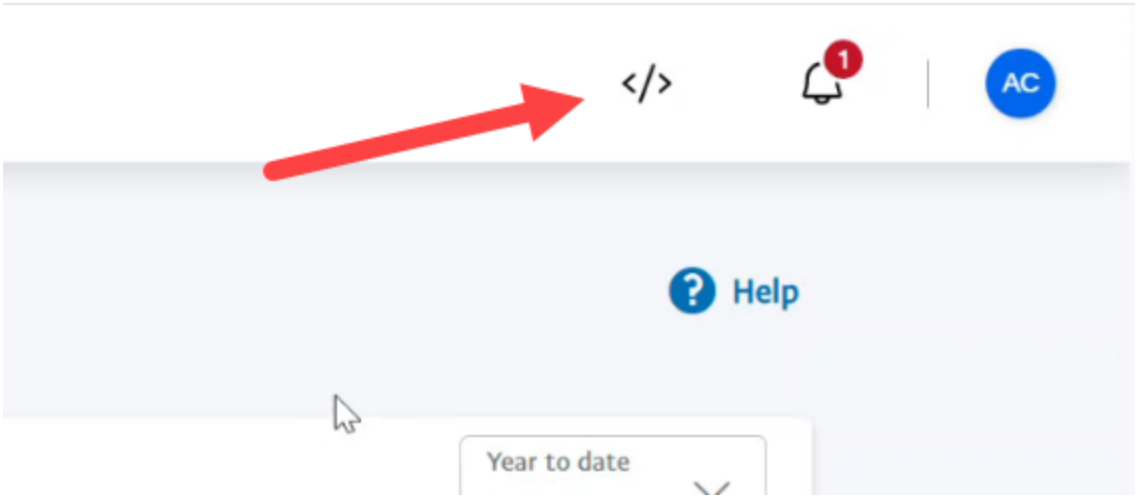
- **PayPal will only process the purchase, it will not trigger any automated delivery of digital goods (or even a customized auto-responder).** A immediate way to confirm their purchase and give them more information is to use the option to set a page where people are redirected to after purchase (in the settings for the Subscription button). On that page, you can have more information there (or a form for them to fill out if you need more information from them).
- **PayPal doesn't allow for collection of other information on a Subscription.** If your offering has 'options' they must choose from and/or other information you need to collect, you'll need to set up a form as a 'step one' that redirects to the Subscription buttons (or the other way around).
- **WooCommerce tie-in:** WooCommerce free version does not support subscriptions (the plugin is $275/yr.) so this is a workaround. If you are using WooCommerce, you can create a 'Product that represents the subscription offering. **Be sure to set the product type to 'External/Affiliate product'** and fill out the link to the sales page otherwise you take the chance they will 'buy' it (and it will bypass the subscription).

Step by Step Instructions:

First you will need to set up API credentials in the Developer area of your PayPal account (this is a business account option, if you don't have these options, you need to upgrade your account).

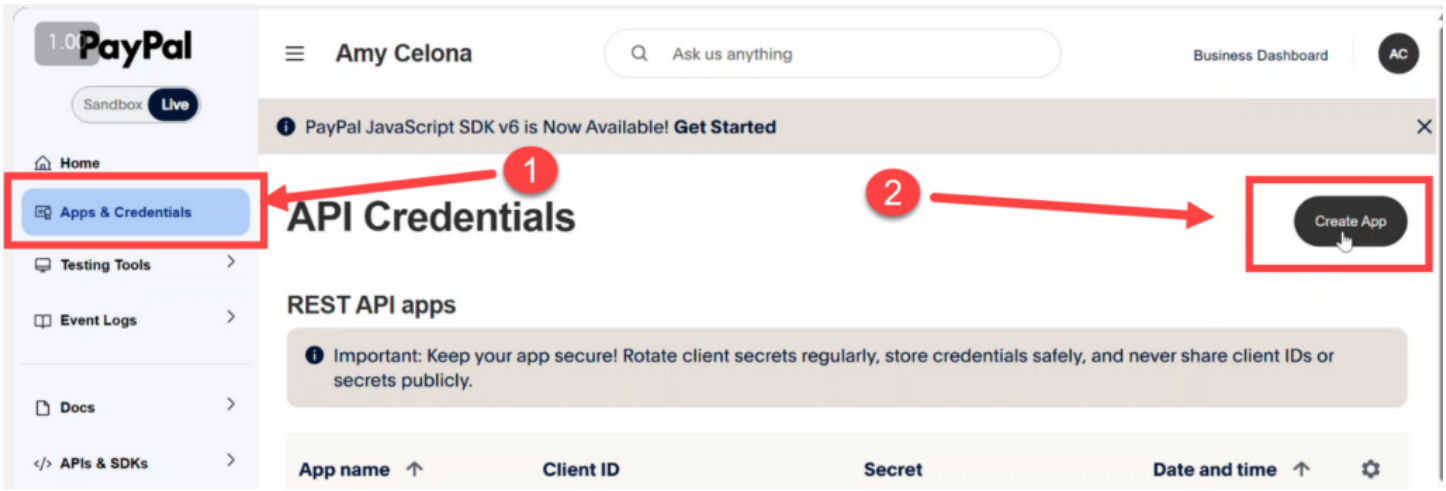
STEP 1.

While logged in, you will click on the </> icon in the top right corner of the page (see figure below):



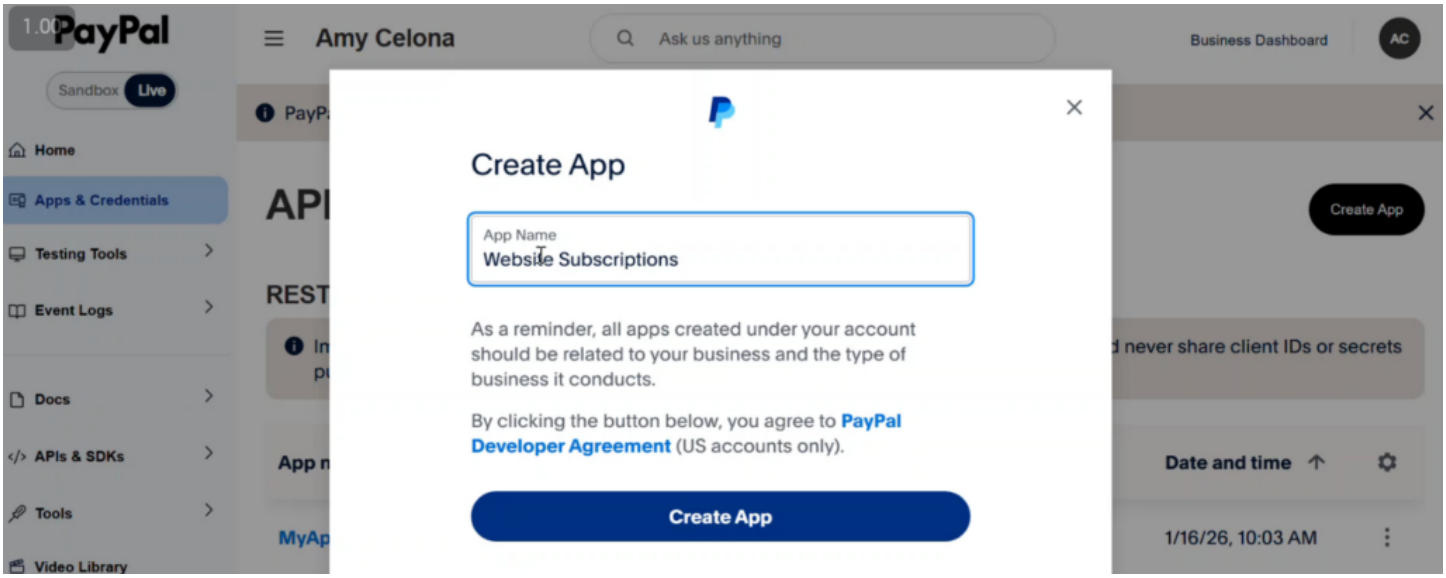
STEP 2.

You will be redirected to the Developer area. On the left side navigation, click on 'Apps & Credentials' and on that page, click on 'Create App' (see figure below:



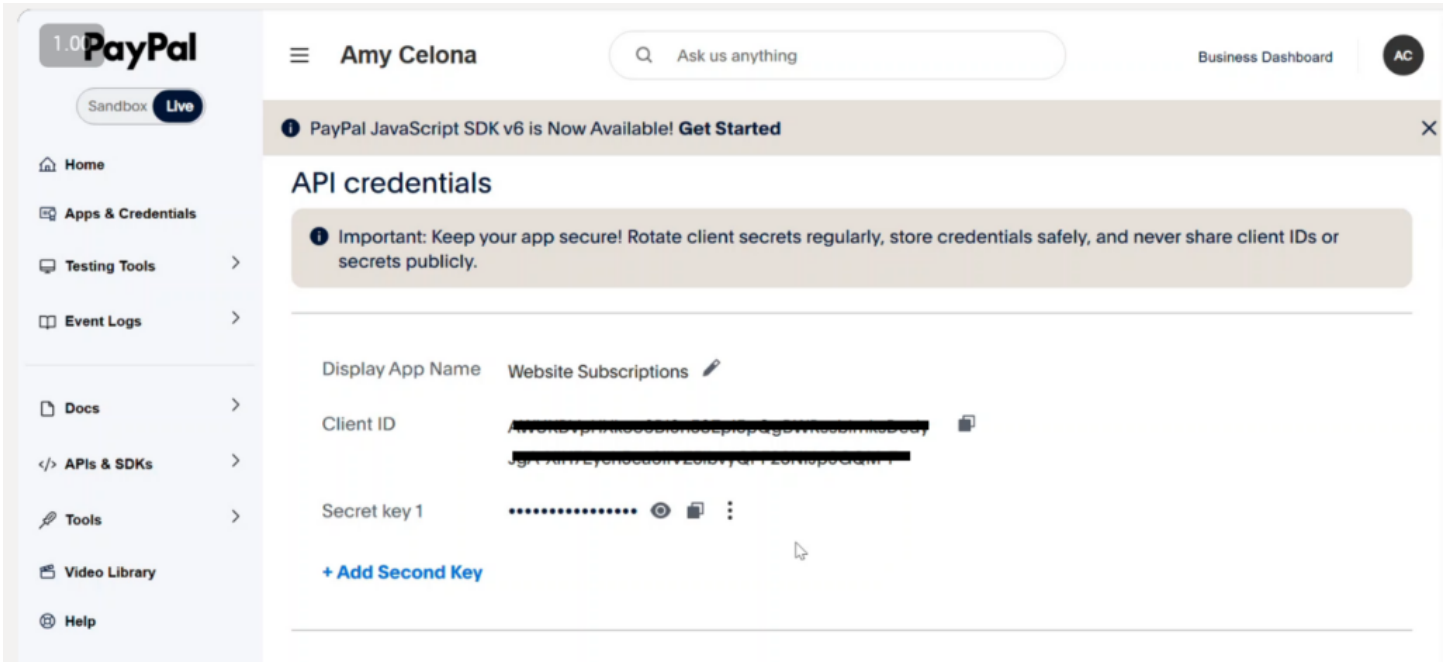
STEP 3.

Name the App something that is related to what it will be connected to (in this case you will be using this for subscriptions you are offering). *You can re-use this in the future but if you need one for a plugin (ex., connecting PayPal to GravityForms) you'll want to make a different App/Credentials for that connection.* The idea is that if you wish to delete credentials, you don't disconnect anything you don't mean to.



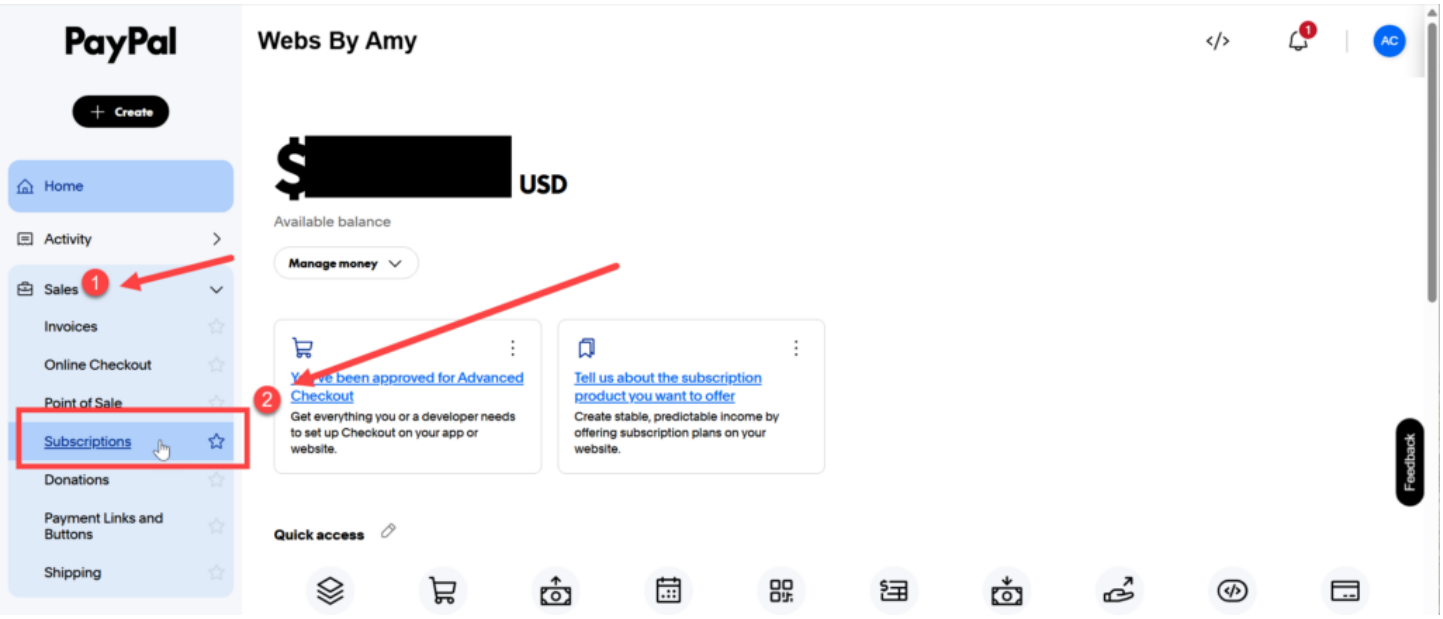
STEP 4.

The next screen will give you the Client ID & Secret Key--you don't need them for this, but for some WordPress plugins, you would need them to connect the Plugin to PayPal. You just need to remember the name for when you create the subscription button (see Figure below):



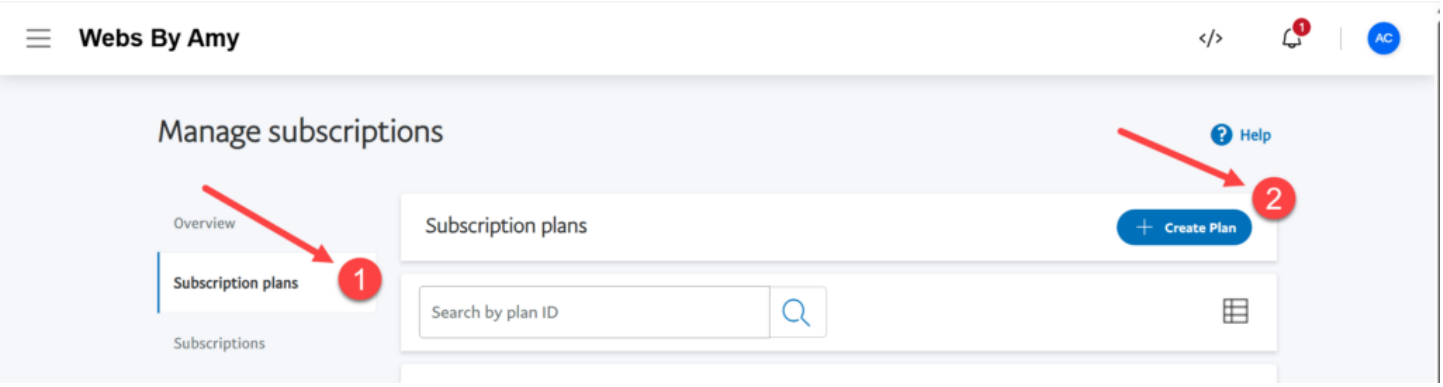
STEP 5.

Back in your main PayPal account (you may have to log out and then login again, I haven't seen where you can toggle back to the regular side of PayPal), on the left navigation click on >Sales >Subscriptions (see figure below)



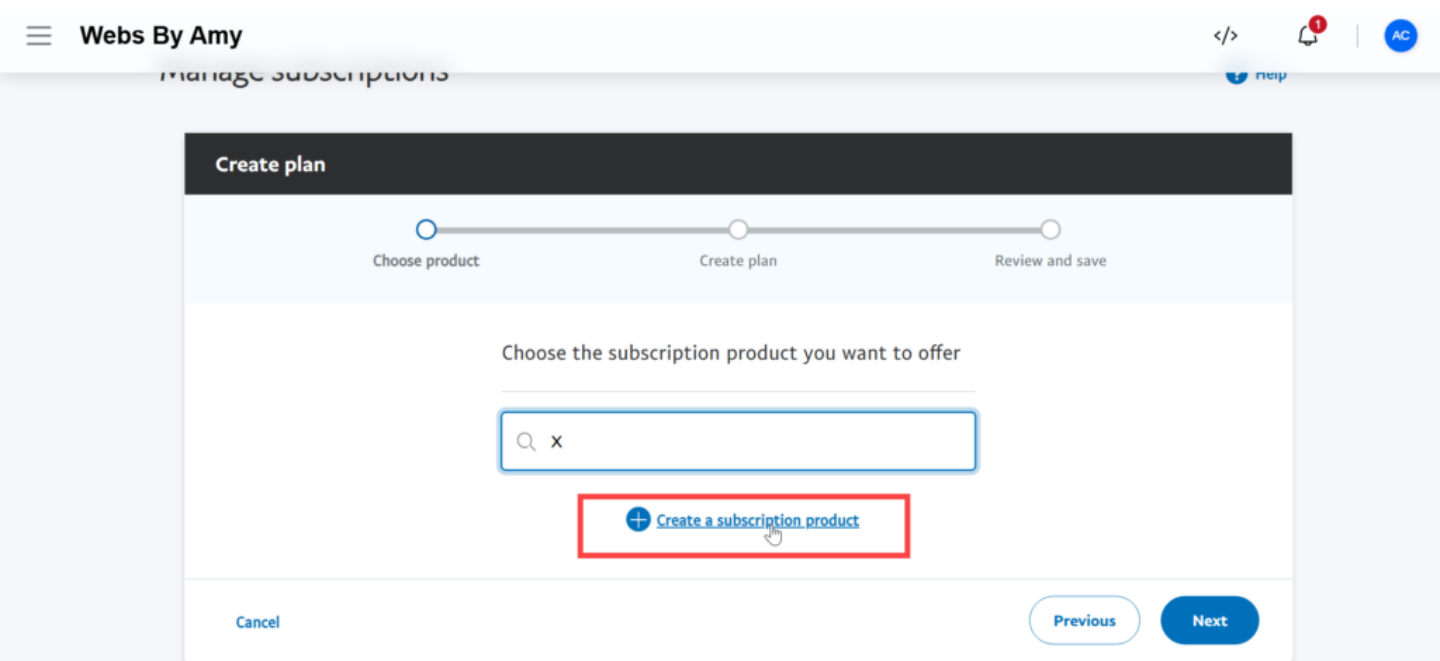
STEP 6.

On the Subscriptions page, click on Subscription Plans on the left navigation and then 'Create Plan' button on the right (see figure below):



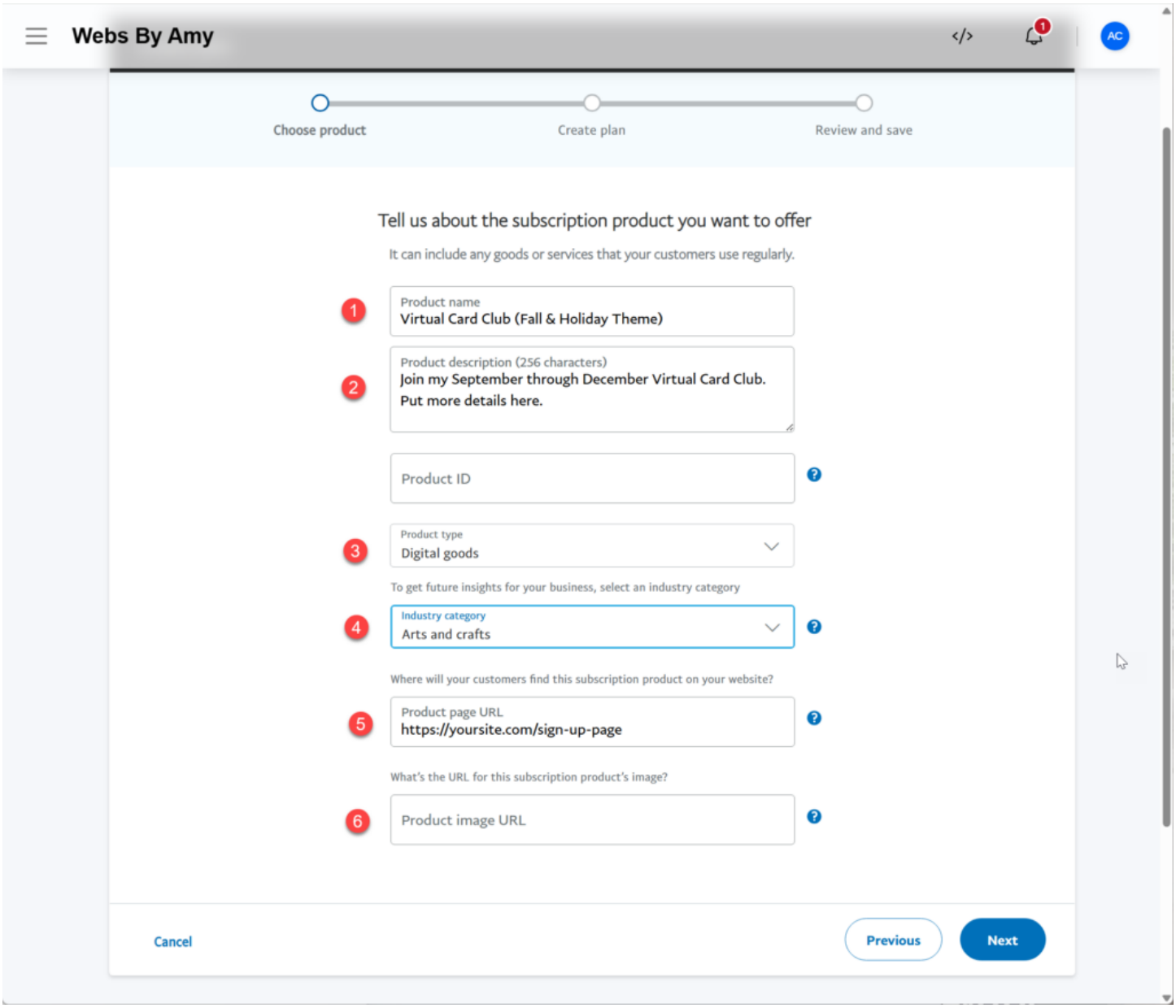
STEP 7.

You will first be asked to choose a 'Product', you will create a Product the first time (you may have to use the 'search bar' and type in an x and the option to 'create a Product' will appear). Click on 'Create a Subscription Product' link at the bottom (see figure below):



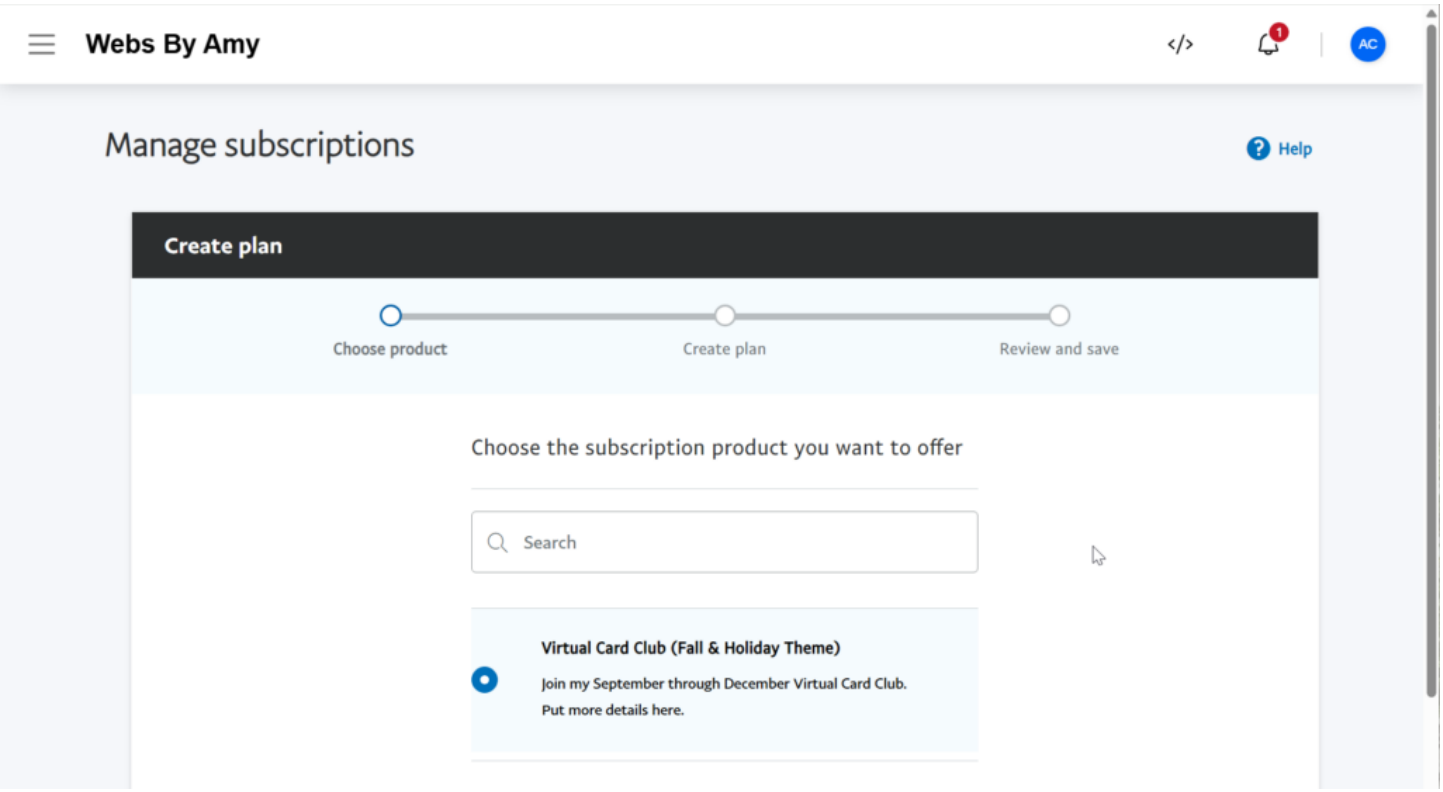
STEP 8.

On the next screen, fill out as much information about the product that you wish. Some of the information is not required, then click on 'Next' (see figure below):



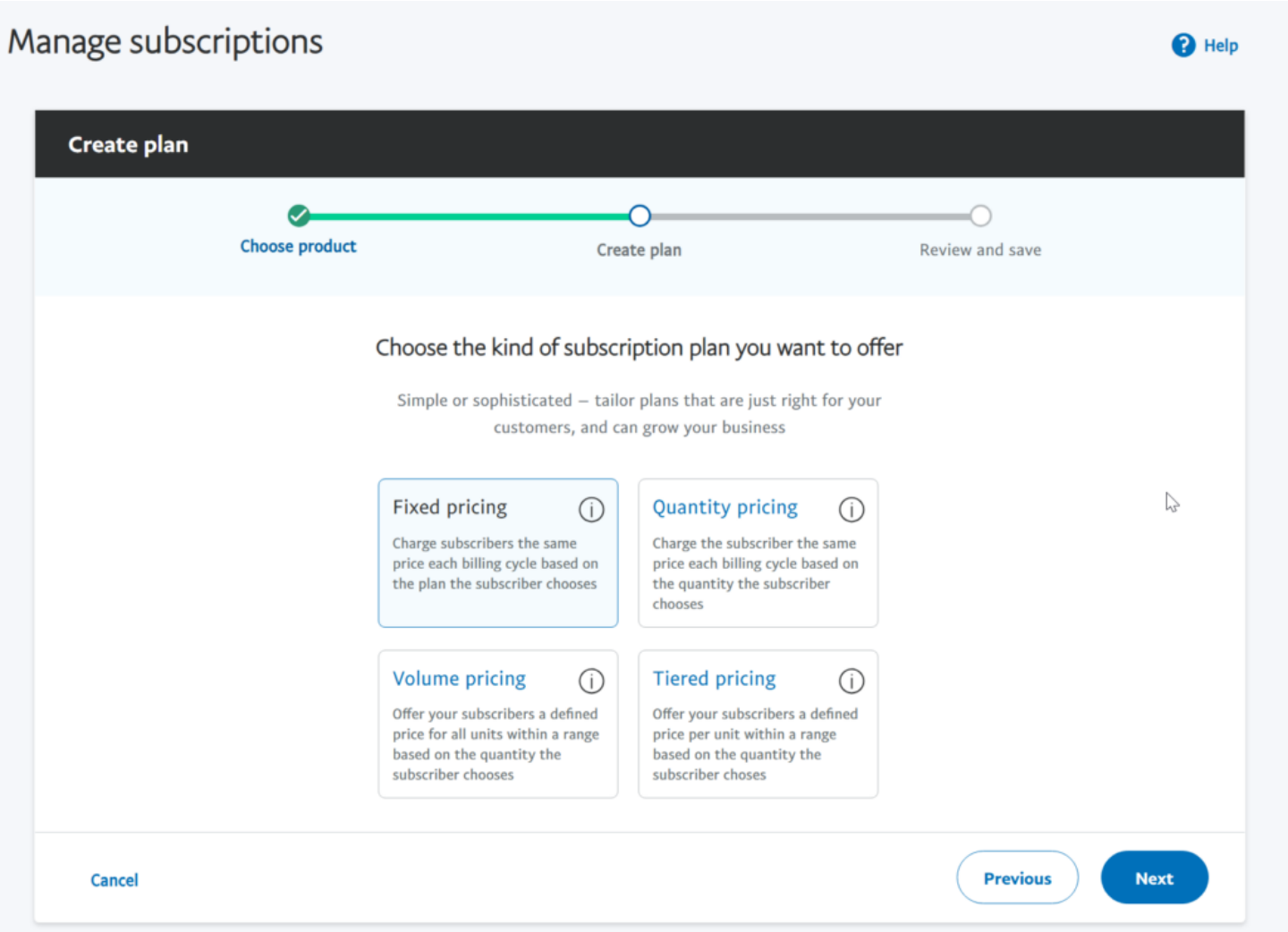
STEP 9.

The 'Next' brings you back to choosing a product and the product you just created will be selected (see figure below), then click on 'Next' at the bottom of the page.



STEP 10.

On this screen, you will see your subscription options. In this example, it is a 4 month 'club' that is the same cost each month and then click 'Next' (see figure below):

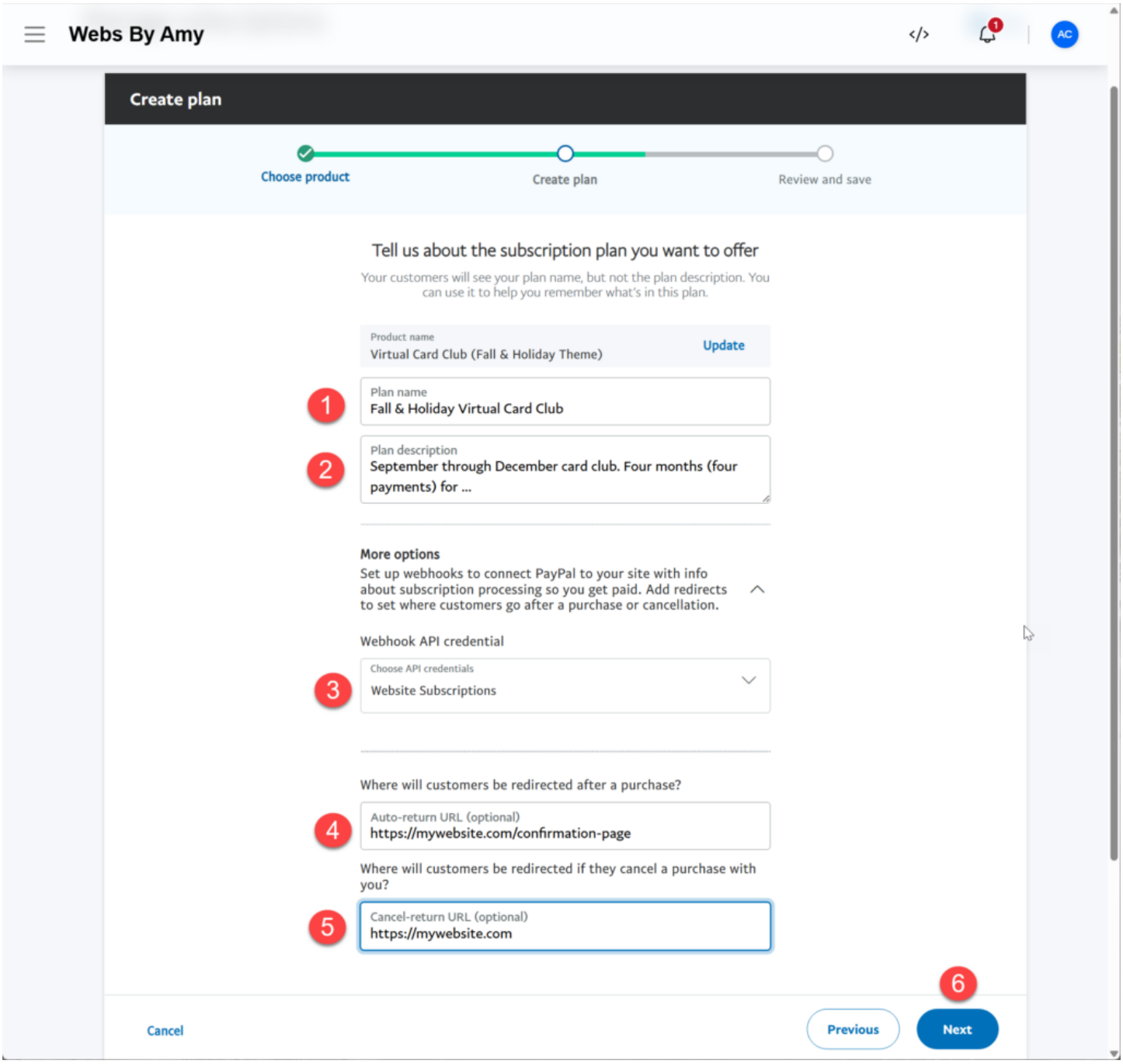


STEP 11.

On this screen you will be creating a Subscription plan for that product.

1. Give your Plan a descriptive name
2. Fill in Plan details (at least the payment schedule)
3. You will have to click on the 'arrow' next to 'More Options' and make sure the Webhook API credentials are what you just created (if you have more than one).
4. Put in a page where your customer is being redirected after purchase. This page is important if you want to have more instructions about what they can expect. You can also have a form on it if you need to collect more information or have them choose options. These things can't be collected through PayPal.
5. You can choose to have a page that redirects them if they cancel their purchase (optional)
6. Click next

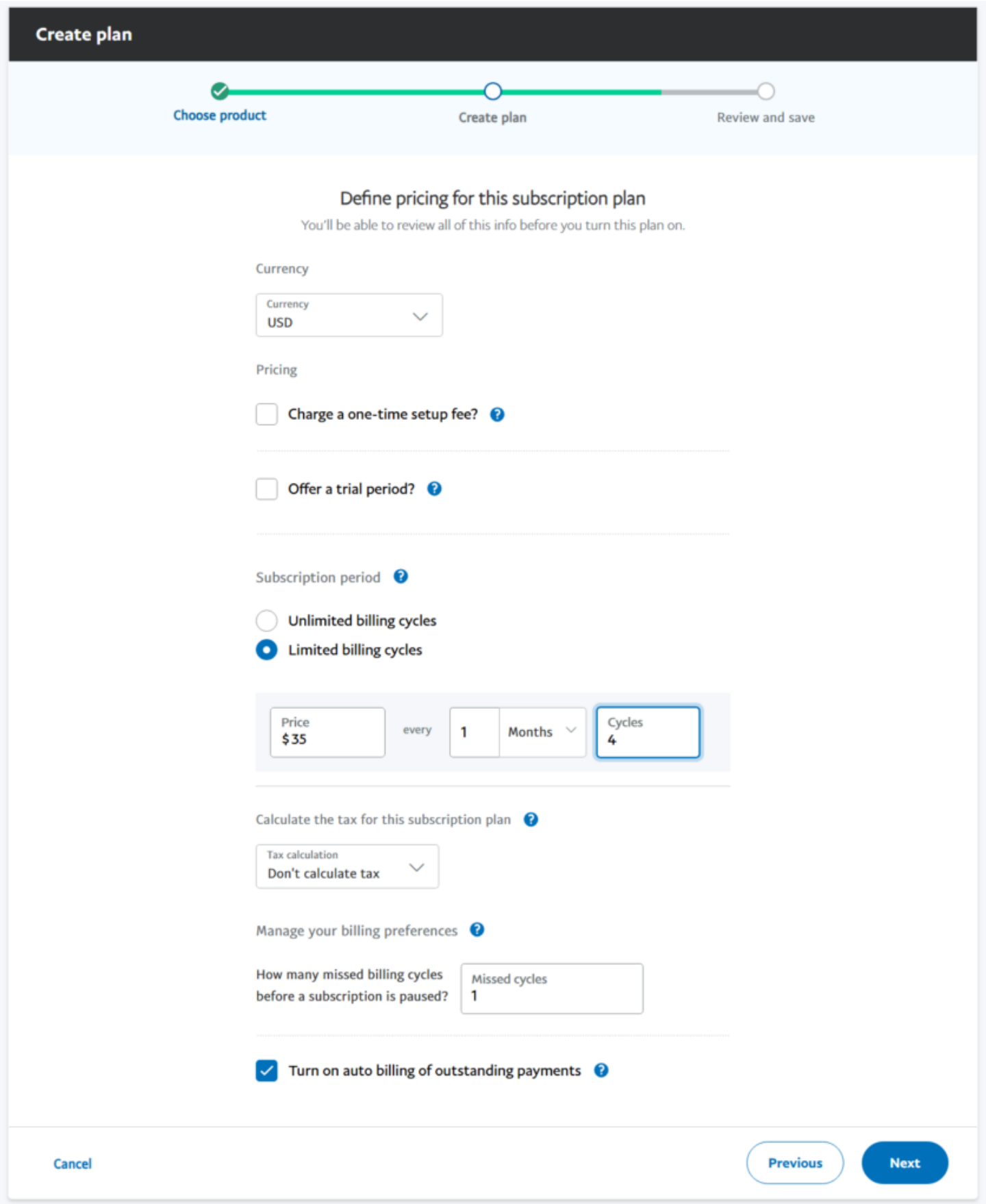
See figure below:



STEP 12.

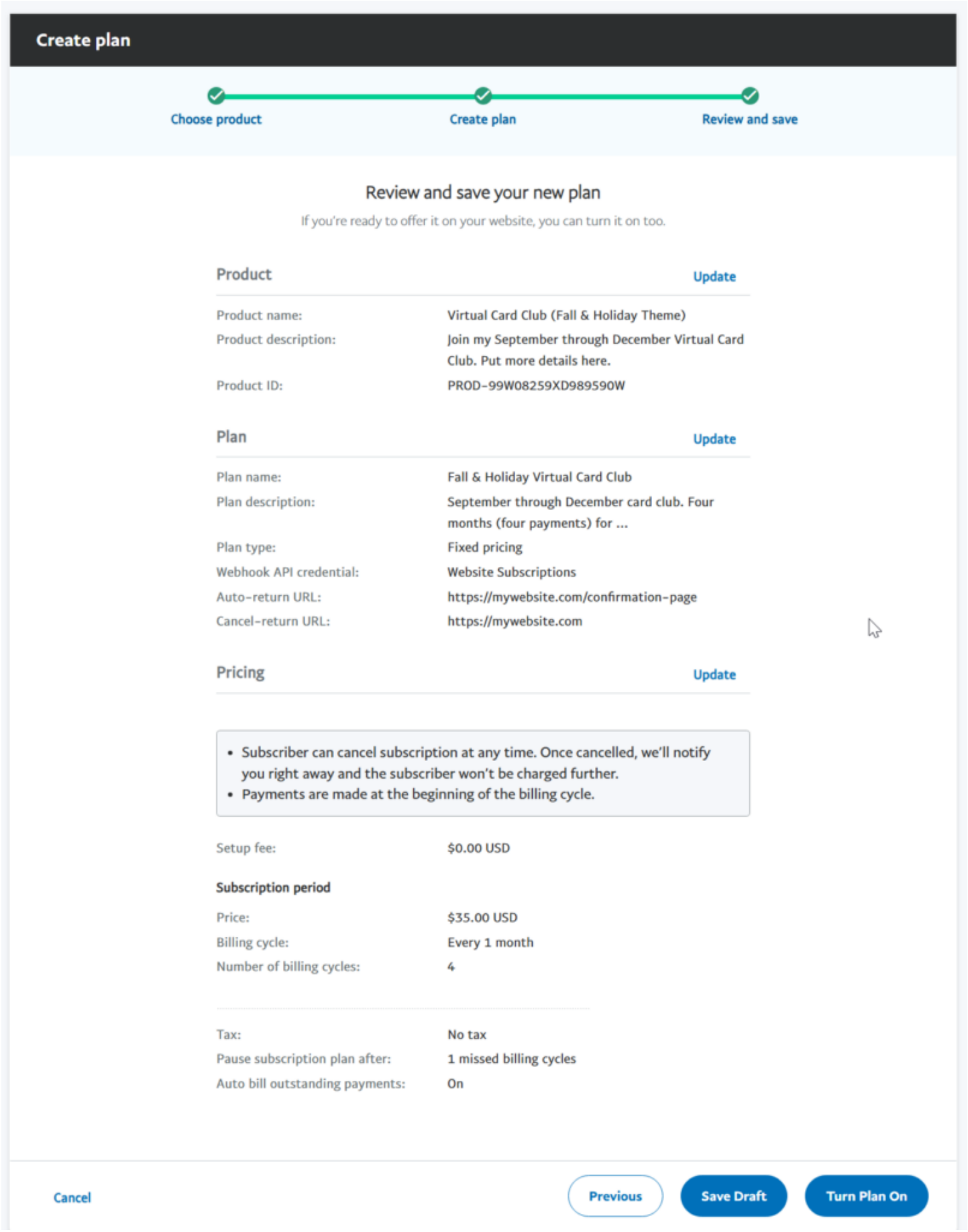
On this page you will be defining the Payment schedule.

In my sample that I created, I chose 'Limited billing cycles' and then $35, once a month for 4 cycles. Read each option (use the ? tips to understand your options) and then click 'Next' at the bottom (see figure below):


Create plan
Choose product
Create plan
Review and save
Define pricing for this subscription plan
You'll be able to review all of this info before you turn this plan on.
Currency
Currency
USD
Pricing
Charge a one-time setup fee?
Offer a trial period?
Subscription period
Unlimited billing cycles
Limited billing cycles
Price
$35
every
1
Months
Cycles
4
Calculate the tax for this subscription plan
Tax calculation
Don't calculate tax
Manage your billing preferences
How many missed billing cycles before a subscription is paused?
Missed cycles
1
Turn on auto billing of outstanding payments
Cancel
Previous
Next

STEP 13.

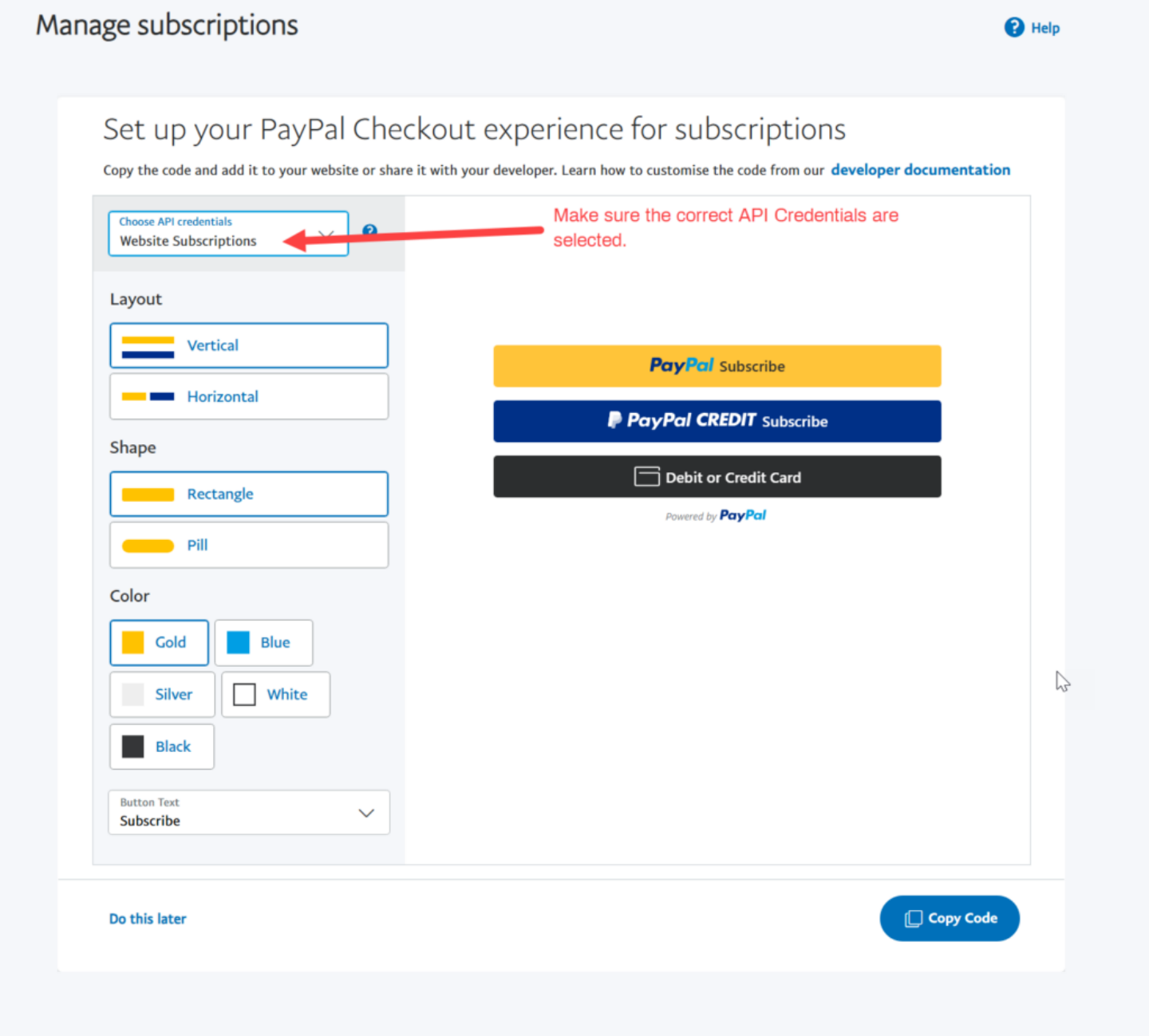
On the 'Review & Save' screen you can view all of your options and make changes before you 'Turn On' or 'Save Draft'.


Create plan
Choose product
Create plan
Review and save
Review and save your new plan
If you're ready to offer it on your website, you can turn it on too.
Product
Update
Product name:
Virtual Card Club (Fall & Holiday Theme)
Product description:
Join my September through December Virtual Card Club. Put more details here.
Product ID:
PROD-99W08259XD989590W
Plan
Update
Plan name:
Fall & Holiday Virtual Card Club
Plan description:
September through December card club. Four months (four payments) for ...
Plan type:
Fixed pricing
Webhook API credential:
Website Subscriptions
Auto-return URL:
https://mywebsite.com/confirmation-page
Cancel-return URL:
https://mywebsite.com
Pricing
Update
Subscriber can cancel subscription at any time. Once cancelled, we'll notify you right away and the subscriber won't be charged further.
Payments are made at the beginning of the billing cycle.
Setup fee:
$0.00 USD
Subscription period
Price:
$35.00 USD
Billing cycle:
Every 1 month
Number of billing cycles:
4
Tax:
No tax
Pause subscription plan after:
1 missed billing cycles
Auto bill outstanding payments:
On
Cancel
Previous
Save Draft
Turn Plan On

STEP 14.

On this next page, you will get the HTML code for your website sales page. Make sure the right API Credentials are chosen in the dropdown box (if you have more than one, it may default to the first one you've ever created).

Check that it appears the way you'd like it to appear and then 'Copy Code'. You won't see the code, it will be in your paste buffer. You'll want to paste it in the HTML block immediately (not save it anywhere it will be corrupted like in a Word program).



STEP 15.

After copying the code, go to your sales page and immediate create an HTML block and drop in the code (see sample below): *click the X on the* '*Made with Snagit*'

Embedded media: https://app.screencast.com/connector/embed/index/I8VzzdqpDGVsZ#?secret=pxJ18q38S7