

Plans: The Complete Guide

Memberships and subscriptions in Bizstim: how to build plans, enrol members, take payments, sell plans online, and the rules behind every booking.

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Your own words

This guide says "session", "client" and "practitioner". If your account uses other words (for example "lesson" or "student"), Bizstim shows your words on every screen and in every message. The rules stay the same.

What a plan is

A plan is a monthly fee that includes an allowance of sessions or hours. Members book as usual. Bookings inside the allowance cost them nothing, because the monthly fee already paid for them.

Use plans for memberships, subscriptions and "so many lessons a month" packages. A few examples:

- **Tutoring Starter:** \$180 a month, 4 sessions a month.
- **Weekly Coaching:** \$240 a month, 2 sessions every week.
- **Studio Hours:** \$300 a month, 10 hours a month, extra hours \$35 each.

Used subscription services before?

Plans replace the old "Subscription or Membership" service setting. [Chapter 16](#) explains what changed and how to move your subscribers.

Where to find it

In the sidebar, open **Account Methods** and choose **Plans**. The page has three tabs:

TAB	WHAT IT HOLDS
Plans	Every plan you have made, with its price, allowance, top-up price, whether it is taxable or sold online, its status and how many members it has. Add, edit and delete plans here.
Categories	The headings plans are grouped under on your Plans page, in the student portal and in the Enrol list.
Members	Everyone on a plan: what is left, the next renewal date, how they pay, and the menu to change, cancel or end their plan.

PLANS	CATEGORIES	MEMBERS
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ADD PLAN

25 Search...

NAME	PRICE	ALLOWANCE	TOP-UP	TAXABLE	ONLINE	STATUS	MEMBERS	OPTIONS
Once a week								
1. Learn	\$ 240.00	1 session / week	\$ 65.00 / session	—	✓	ACTIVE	3	
2. Perform MOST POPULAR	\$ 300.00	1 session / week	\$ 65.00 / session	—	✓	ACTIVE	3	
Twice a week								
1. Practice	\$ 440.00	2 sessions / week	\$ 60.00 / session	—	✓	ACTIVE	2	
2. Excel BEST VALUE	\$ 520.00	2 sessions / week	\$ 60.00 / session	—	✓	ACTIVE	1	

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Showing 1 to 4 of 4 entries

The Plans tab. Plans are grouped by category, in your chosen order.

Who has Plans

- Plans come with most Bizstim subscriptions. If your subscription does not include them, the Plans page shows *"Your account plan does not have access to Plans."*
- Plans and Package Mode don't work together. While Package Mode is on, the Plans page is hidden and shows *"Plans are not available while Package Mode is on."*
- Staff need the **Manage Plans** permission (see [Chapter 13](#)).

The four states of a membership

STATE	WHAT IT MEANS
Active	The member is paid up for the current period and can book.
Payment due	The current period is not fully paid yet. The member can book during the plan's grace days, then booking stops until the payment is in. You and your staff can always book for them.
Ends (date)	The plan is set to cancel at the end of the paid period. It works as normal until then and does not renew.

Ended

The plan is over. It shows on the Members tab when **Show past** is ticked.

CHAPTER 2

Building a plan

Click **Add plan** on the Plans tab. The form has every setting, a summary of the plan "in words", and a preview of the card your members will see.

EDIT PLAN

Plan name ⓘ

Practice

Monthly price ⓘ

440.00

Description (optional) ⓘ

Two 1-hour sessions a week. Unlimited worksheets, lesson feedback, customized sessions and homework review.

Category ⓘ

Twice a week

Order within the category ⓘ

1

Counting and the allowance period are locked because this plan has members.

Counts ⓘ

☒ sessions

☐ Hours

Allowance per period ⓘ

2.00

Allowance period ⓘ

☒ Week, Monday to Sunday

☐ Month, renewal to renewal

Top-up price (each extra unit) ⓘ

60.00

Grace days after an unpaid renewal ⓘ

3

Status ⓘ

☒ Active

☐ Inactive

The top of the plan form.

The fields, one by one

FIELD	WHAT IT DOES
Plan name	Up to 100 characters. Members see it on their plan card and next to the covered services in the booking list.
Monthly price	Charged when the member joins and again on each renewal date. It goes on the account as a charge, like a session fee. It can be 0 (see "Free plans" below).
Description (optional)	Up to 2000 characters. Members see it under the plan name in their portal and on your public Plans page.

Category	The heading the plan shows under. Make categories on the Categories tab first (Chapter 3).
Order within the category	A whole number from 0 to 9999. Lower numbers show first. Plans with the same number, or none, show by name.
Counts: sessions or hours	Sessions: every booking uses one, whatever its length. Hours: a booking uses its length, so a 90-minute booking uses 1.5. Locked once anyone has held the plan.
Allowance per period	How many sessions or hours are included. Must be more than 0. When counting sessions it must be a whole number. Hours go in quarter-hour steps.
Allowance period	Week, Monday to Sunday: the allowance resets every Monday. Month, renewal to renewal: it resets on the member's renewal date. The price is monthly either way. Locked once anyone has held the plan.
Top-up price	What one extra session or hour costs once the allowance is used up. Leave it at 0 and extra bookings are charged at the normal service rate instead. Members can only buy top-ups when this is above 0.
Grace days	0 to 31. How long after an unpaid renewal the member can still book. 0 means booking stops the day the payment is missed. You and your staff can always book.
Status	Active: open for new members. Inactive: current members keep the plan and keep renewing, but nobody new can join, and the plan leaves the Enrol list and your online pages.
Missed uses the allowance	Ticked by default. A missed session still uses up one of the included sessions (or its hours).
Cancelled uses the allowance	Not ticked by default. When ticked, a cancelled session still uses up the allowance.
Available online	Members can buy the plan themselves by card, in their portal and on your public Plans page. Off: only you and your staff can enrol them.
Highlight with a label	Puts a coloured label (Most popular, Best value, or your own words up to 30 characters) on the plan's card. One plan per category.
Taxable	Adds tax to the price using the rate you set for the member's state. When ticked, a "Tax rate by state" list opens with every state on your client records.
Covers these services	Pick at least one. Only bookings for these services use the plan; anything else is charged as usual. Services hidden from clients are marked "(not visible to clients)". The Smart Learn service is never listed.

Plan options

- ☒ Missed uses the allowance *i*
- ☐ Cancelled uses the allowance *i*
- ☒ Available online *i*
- ☐ Highlight with a label (one plan per category) *i*
- ☐ Taxable *i*

Covers these services *i*

☐ French Tutoring
 ☒ Math Tutoring
 ☒ Reading and Writing
 ☐ SAT / ACT Prep
 ☒ Science Tutoring

This plan, in words

A sessions plan called **Practice**, where the member gets 2 sessions every week for \$ 440.00 a month. It covers **Math Tutoring, Reading and Writing, Science Tutoring**. Other services are charged as usual. Once the 2 sessions are used, each extra session costs \$ 60.00 until Sunday. A missed booking still uses one of the sessions. If a renewal goes unpaid the member may keep booking for 3 days, then they are stopped until it is paid. Members can buy it themselves from their portal.

This plan, as the member will see it

PRACTICE

\$ 440.00 per month

2 sessions included every week

Covers Math Tutoring, Reading and Writing, Science Tutoring

Extra session: \$ 60.00

Missed counts · cancelled free

3 grace days on an unpaid renewal

ACTIVE

AVAILABLE ONLINE

The options, the covered services, and the live summary and card preview.

"This plan, in words" and the card preview

As you fill in the form, Bizstim writes the plan out in plain sentences and draws the card members will see. Read it before saving: if the sentence isn't what you meant, a setting is wrong. Open [What the fields mean](#) at the bottom of the form for a quick reminder of every field.

Rules the form checks when you save

- A plan needs a name and at least one covered service.
- Prices can't be negative. Tax rates are 0 to 100 percent; leave a state blank for no tax.
- **Selling online needs a price above 0.** *"A plan offered online needs a price above 0."*
- **Selling online needs a service members can book now.** At least one covered service must be active. *"A plan offered online needs at least one active service."*
- **An active plan sold online can only cover services set to Visible to all users.** The message names the services that are not. Change them on the Services page, untick Available online, or set the plan to Inactive.
- You can't take a service off a plan while that plan's members have upcoming sessions on it ([Chapter 4](#)).
- Counting and the allowance period can't change once anyone has held the plan ([Chapter 5](#)).

Free plans

A plan with a price of 0 is allowed, for example for scholarships, staff family or a trial month. Only you and your staff can enrol people on it; it is never sold online. It renews every month at no charge.

How the dates work

- A member's plan starts on the day they join. Each **period** runs from that day to the day before the same date next month. Joined on March 10: the first period is March 10 to April 9 and the plan renews on April 10.
- Short months are handled for you. Joined on January 31: renewals fall on February 28 (or 29), then March 31, then April 30, and so on.
- For a **weekly** allowance, the week is Monday to Sunday. A member who joins on a Thursday gets the full weekly allowance for that first week.
- All dates follow your account's time zone.

Categories, order and highlight labels

Categories put your plans under headings, such as "Tutoring" and "Test Prep", in the order you choose. They are optional.

Making categories

- 1 Open the **Categories** tab and click **Add category**.
- 2 Give it a name (up to 100 characters; each name can be used once on your account) and, if you like, a one-line description (up to 255 characters). The description shows under the heading on your Plans page and in the student portal.
- 3 Drag rows by the handle to change the order of the categories.
- 4 Edit each plan and choose its **Category** and its **Order within the category**.

	CATEGORY	DESCRIPTION	PLANS	OPTIONS
⬆ ⬇ ⬆	Once a week	One session every week, for steady progress.	2	
⬆ ⬇ ⬆	Twice a week	Two sessions every week, for faster results and exam years.	2	

The Categories tab. The PLANS column counts the plans that use each category.

How plans are sorted

- Categories show in the order you dragged them into.
- Inside a category, plans show by their order number (lowest first), then by name.
- When you have categories, plans with no category show last, under the heading **Other plans**.
- With no categories at all there are no headings, and plans show by their order number, then by name.
- A category with nothing on offer shows no heading on that page.

The same grouping and order is used on the Plans tab, the Members tab plan filter, the Enrol and Change plan lists, the student portal and your public Plans page.

Deleting a category

A category can only be deleted when no plan uses it, active or inactive. Otherwise: *"Plans use this category. Move them to another category, or to No category, first."*

Highlight labels ("Most popular")

- Tick **Highlight with a label** on a plan and choose **Most popular**, **Best value** or **Other** (type your own label, up to 30 characters).
- The plan's card gets a coloured label and a border in your brand colour on your Plans page and in the student portal. On the Plans tab the label shows next to the name.
- **One highlighted plan per category.** Plans with no category count as one group. Ticking it on one plan takes it off the other plan in that category when you save.

Plans and your services

A plan only covers the services you tick on it. Bookings for other services are priced and charged exactly as they always were.

What "covered" means

When a member books a covered service, the booking counts against the plan's allowance. Inside the allowance it costs them nothing. Past the allowance it costs the top-up price, or the normal service rate when the plan has no top-up price ([Chapter 8](#)).

One plan per service, per member

A member can hold more than one plan, but no two of their plans can cover the same service. Bizstim refuses an enrolment, a plan change or an online purchase that would overlap: *"This plan shares a service with the (name) plan already held. End that plan first, or choose another."*

EXAMPLE

Maya holds "Math Weekly" (covers Math Tutoring). You can also enrol her on "Reading Monthly" (covers Reading Tutoring). You can't enrol her on "All Subjects" if it also covers Math Tutoring.

What members see in the booking list

When a member on a plan books, each covered service in the service list shows a short note, for example "Math Weekly plan: 2 of 4 left this week". The note changes with the situation:

- **payment due** when the plan is waiting for a payment;
- **allowance used up, top-up \$35.00 each (or extra at the normal rate)** when nothing is left;
- **ended, covered until (date)** for a plan that has ended but whose last paid period still covers that date.

Practitioners see only the plan name and what is left. Clients who are not allowed to see prices see "allowance used up" without the top-up price. In a group session, a line under the service list names everyone in the group who is on a plan.

Service

Select Service (required)



Select Service (required)

Math Tutoring (Cost: 60.00 | Wage: 30.00) (Learn plan: allowance used up, top-up \$ 65.00 each)

Reading and Writing (Cost: 55.00 | Wage: 28.00) (Learn plan: allowance used up, top-up \$ 65.00 each)

Science Tutoring (Cost: 60.00 | Wage: 30.00) (Learn plan: allowance used up, top-up \$ 65.00 each)

The plan note next to a covered service when booking.

Rules on the Services page that protect your members

YOU TRY TO	WHAT HAPPENS
Make a service inactive, or delete it	Refused while the service has any upcoming sessions (plan or not), or while a live plan covers it. A live plan is an active plan, or any plan that still has members (including a member waiting to move onto it). The message says why, for example: <i>"Math Tutoring was not changed: it is covered by the Math Weekly plan. Complete or move the sessions and take the service off the plan (Plans) first."</i>
Hide a service from clients	Refused while an active plan that is sold online covers it: <i>"...it is covered by the (name) plan, which is sold online. Untick Available online on the plan (Plans), or take the service off it, first."</i>

Take a service off a plan

Refused while that plan's members have upcoming sessions on that service: *"3 upcoming sessions of this plan's members use a service you removed. Complete or move them first."*

Why these rules exist

Without them a member could be left paying every month for a plan with nothing they can book, or holding sessions on a service that has disappeared.

The same rules apply on the staff side and through the Bizstim API.

Changing prices and plan settings

You can edit a plan at any time. The change applies to the plan itself, so it reaches every member on it. Here is exactly when each change takes effect.

YOU CHANGE	WHAT HAPPENS TO CURRENT MEMBERS
Monthly price	Nothing changes for the period they have already started. Every member is charged the new price from their next renewal . There is no proration and no catch-up charge.
Tax rates or Taxable	Applied to the next charge (renewal, upgrade or top-up). Charges already on the account keep the tax they were made with.
Allowance	Applies straight away , including the current week or period. Raise it and members can book more today. Lower it and members who have already used or booked more than the new figure can't book more this period. Sessions already booked are not removed.
Top-up price	Applies to the next top-up a member buys, and to any session priced over the allowance from now on.
Missed / Cancelled uses the allowance	Applies to sessions marked missed or cancelled from now on. Members with their own setting (Chapter 7) keep theirs.
Grace days	Applies straight away to members whose payment is due.
Covered services	Adding a service covers it straight away. Removing one is refused while members have upcoming sessions on it (Chapter 4).
Name, description, category, order, label	Shown everywhere straight away. Charges already on the account keep the plan name they were made with.
Status to Inactive	Current members keep the plan and keep renewing. Nobody new can join, and the plan leaves the Enrol list, the Change plan list and your online pages.
Available online off	The plan leaves the student portal and your public Plans page. Current members are not affected.

Tell members before you raise a price

Bizstim does not e-mail members when a plan's price changes. Their next renewal is simply charged at the new price, by card if they pay by card. Let them know before their renewal date.

Giving some members the old price

A price belongs to the plan, not to the member. To keep existing members on the old price and charge newcomers more:

- 1 Make a new plan with the new price and the same services, counting and period.
- 2 Set the old plan to **Inactive**. Its members keep their price and keep renewing; nobody new can join it.
- 3 New members join the new plan.

Counting and the period are locked

Once anyone has held a plan, past or present, you can't change it between sessions and hours, or between weekly and monthly. "*Counting and the allowance period are locked once the plan has members.*" A blue note on the form says so. To offer a different shape, make a new plan; members move by ending one plan and enrolling on the other, because a plan change only works between plans that count the same way over the same period.

Inactive or delete?

- **Delete** only works for a plan nobody has ever held. Otherwise: "*This plan has members, past or present. Set it to Inactive instead.*"
- **Inactive** is the way to retire a plan with history. Its members and its records stay.

Enrolling a member

You or your staff can put any active client on any active plan. Members can also buy plans themselves online ([Chapter 11](#) and [Chapter 12](#)).

- 1 Open the **Members** tab and click **Enrol a client**. (The button is greyed out until you have an active plan.)
- 2 Choose the client. Only active clients are listed.
- 3 Choose the plan. Only active plans are listed, grouped by category. The price shown is before tax.
- 4 Choose how they pay: **By hand** or **Card on file**.
- 5 Check the total, record the payment if you have it, and click **Enrol**.

ENROL ON A PLAN

Client

Benjamin Lee

Plan

Perform - \$ 300.00

Payment

☒ By hand

No card on file: payment by hand only.

Total: \$ 300.00

☒ Record payment now

Amount received	Paid with	Date received
300.00	Cash	10/23/2026

☐ Email a receipt

CLOSE

ENROL

Enrolling a member and recording the first payment.

By hand or card on file

METHOD	WHAT HAPPENS
By hand	You collect the money (cash, cheque, transfer, card machine) and record it. The plan fee is added to the account as a charge. Each renewal adds the next charge and tells you to collect it (Chapter 10).

Card on file

The client's saved card is charged the full amount, tax included, straight away, and again on every renewal date. Only offered when your account takes card payments through Stripe and the client has a saved card. If the card is declined, the client is not enrolled and you see the bank's reason.

Recording the first payment (by hand)

- **Record payment now** is ticked to start with. Fill in the amount received, how it was paid and the date, and tick **Email a receipt** if you want the client to get the usual receipt e-mail. The plan starts paid (Active).
- If you record **less than the total**, the plan shows **Payment due** until the rest is recorded from Add Payment. The message after enrolling says how much is still owed.
- Untick it to enrol now and record the payment later. Until then the plan shows Payment due.
- If the client also owes money on ended plans, the message after enrolling says so. The payment you record here goes to the new plan first.

Tax

For a taxable plan, the total adds the rate you set for the client's state. If no rate is set for their state, a yellow note says *"This plan is taxable but no rate is set for (state). No tax will be added."*

When the plan starts

Today, on your account's clock. The first period runs to the day before the same date next month, and the allowance is available at once. A free plan starts Active with no charge.

Managing a member

Everything about a member's plan is on the Members tab. Find them by plan or by name, then use the menu at the end of their row.

PLANS CATEGORIES MEMBERS

ENROL A CLIENT

All plans

Search by name

☐ Show past

25

NAME	PLAN	STATUS	LEFT	RENEWS	PAYMENT	OPTIONS
Ella Bianchi	Excel	ACTIVE	0 of 2 left this week	Nov 19, 2026	By hand	
Amelia Clarke	Practice	ACTIVE	0 of 2 left this week	Nov 19, 2026		
Noah Fraser	Learn	ACTIVE	0 of 1 left this week	Nov 19, 2026		
Leo Hughes	Perform	ACTIVE ENDS NOV 18, 2026	1 of 1 left this week	—		
Sophia Martin	Perform	ACTIVE	0 of 1 left this week	Nov 19, 2026		
Olivia Nguyen	Learn	PAYMENT DUE SINCE OCT 19, 2026	0 of 1 left this week	Nov 19, 2026	By hand	
Isabella Rossi	Learn	ACTIVE	0 of 1 left this week	Nov 19, 2026	By hand	
Mason Singh	Perform	ACTIVE	0 of 1 left this week	Nov 19, 2026	By hand	
Ava Thompson	Practice	ACTIVE	0 of 2 left this week	Nov 19, 2026	By hand	

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Showing 1 to 9 of 9 entries

Refunds are made from the [Payments](#) page.

The Members tab with a row's menu open.

Reading the Members list

COLUMN	SHOWS
Name	Links to the client record.
Plan	The plan held. "Moves to (plan) at renewal" when a downgrade is waiting.
Status	Active, Payment due (since a date), Ends (date), or Ended (date).
Left	For example "2 of 4 left this week": the allowance, plus any top-up for this period, less what has been used and what is already booked.

Renews	The next renewal date. Blank when the plan is set to end.
Payment	Card or By hand.

Use the plan filter and the name search to narrow the list. Tick **Show past** to include ended plans. Click a plan's member count on the Plans tab to jump to its members. The client record also shows a line for each plan, such as "Math Weekly, 2 of 4 left this week, renews Nov 1".

Record payment

The card icon on the row opens Add Payment for that client. Any payment you record there is matched to their unpaid plan charges automatically ([Chapter 10](#)).

Change plan

CHANGE PLAN

×

New plan

Excel - \$ 520.00

▼

A dearer plan starts now and the difference for the days left is charged. A cheaper plan starts at renewal. Choose the current plan to withdraw a waiting change.

CLOSE

CHANGE

Change plan.

- **A dearer plan starts now.** The difference in price for the days left in the current period is charged (or charged to the card for card members). The new plan's allowance applies straight away to the current period; what was already used still counts.
- **A cheaper plan, or one at the same price, starts at renewal.** The row shows "Moves to (plan) at renewal" and the next renewal is charged at the new plan's price.
- **Choose the current plan** to withdraw a waiting change.
- Both plans must count the same way over the same period: *"Plans must count the same way over the same period to switch. End this plan and enrol on the other one instead."*
- The new plan can't share a service with another plan the member holds.

WORKED EXAMPLE: UPGRADE

Leo is on Starter (\$120 a month). His period is October 1 to October 31 (31 days). On October 22 you move him to Plus (\$180). Days left, counting today: 10. Charge: $(\$180 - \$120) \times 10 / 31 = \$19.35$ (plus tax if Plus is taxable). From November 1 he renews at \$180.

Settings (for one member)

SETTING	WHAT IT DOES
Missed / Cancelled	Follow the plan, Uses the allowance or Does not use the allowance. Overrides the plan's setting for this member only.
Allow booking while unpaid	Lets this member keep booking while a renewal is unpaid, beyond the plan's grace days.
Payment	Switch between By hand and Card on file (card only when they have a saved card). Renewals from then on use the new method.

Cancel at period end, or End now

ACTION	WHAT HAPPENS
Cancel at period end	The plan works as normal until the end of the paid period, then ends with no renewal charge. The row shows "Ends (date)". Keep plan undoes it. Members can do this themselves from My Plans.
End now	The plan ends today. Today is still covered; the rest of the paid period is given up. Nothing is refunded automatically. Add an optional note. Refunds are made from the Payments page.

History

Every event on a membership with its date, amount and note, newest first (the latest 100): purchase, renewal, top-up, upgrade, downgrade (including a waiting change and a withdrawn change), cancel, failed payment, ended, payment applied, refund.

HISTORY: LEARN - ISABELLA ROSSI			
DATE	TYPE	AMOUNT	NOTE
2026-10-19	Payment	\$ 240.00	Applied from the 2026-10-19 payment.
2026-10-19	Purchase	\$ 240.00	
			CLOSE

A member's plan history.

Protections on the client record

- A client holding a plan (Active or Payment due) can't be set to inactive or prospect, or given an inactive date: *"(Name) holds the (plan) plan and cannot be set to inactive. End the plan first (Plans, Members tab)."*
- An inactive date set earlier waits until the plan ends.
- A client who has ever held a plan can't be deleted, because the plan charges and history belong to them. Set them inactive once their plan has ended.

How the allowance works

The allowance is what the monthly fee includes. Here is exactly how it is counted, when it resets, and what happens when it runs out.

What uses the allowance

SESSION OUTCOME	USES THE ALLOWANCE?
Completed	Always.
Missed	Follows the plan (ticked by default), unless the member's Settings or the tick box on the session say otherwise.
Cancelled	Follows the plan (not ticked by default), unless the member's Settings or the tick box on the session say otherwise.
Still upcoming	Held against the allowance as booked, so a member can't book past it, but not used until the session is marked.

The deciding order is: the tick box on the session, then the member's Settings, then the plan.

The tick box on the session

When you or your staff mark a session **Cancelled** or **Missed** for a member on a plan, a blue box appears: "**(Plan): uses the allowance**". It is pre-ticked from the plan and member settings. Untick it to let this one session off, or tick it to count it. Practitioners and clients don't see this box; their sessions follow the member and plan settings.

☐ Open
 ☐ Canceled
 ☒ Missed
 ☐ Completed

☒ Practice: uses the allowance

Choosing whether a missed session uses the allowance.

Sessions or hours

- **Sessions:** each booking uses 1, whatever its length.
- **Hours:** each booking uses its length in hours. A 45-minute session uses 0.75; a 2-hour session uses 2.

When the allowance resets

- **Weekly plans:** every Monday. Each booking counts against the week (Monday to Sunday) it falls in.
- **Monthly plans:** on the member's renewal date. Each booking counts against the period it falls in, so booking ahead uses next period's allowance, not this one's.
- **Unused allowance does not carry over.** It expires at the end of the week or period.

When the allowance runs out

PLAN HAS	A COMPLETED OR MISSED SESSION PAST THE ALLOWANCE
A top-up price	The part past the allowance is charged at the top-up price. On an hours plan with 0.5 hours left, a 1-hour session costs half an hour at the top-up price.
No top-up price (0)	The whole session is charged at the normal service rate, as if there were no plan.

A cancelled session past the allowance costs nothing extra.

Clients and practitioners can't book past the allowance in the first place; you and your staff can, and see a warning ([Chapter 9](#)).

Top-ups

- Members buy top-ups on their My Plans page when the plan has a top-up price and you take card payments online. They choose 1 to 5 extra sessions or hours.
- A top-up belongs to the week or period it was bought in, and expires with it.
- The top-up is charged to their account at the top-up price (plus tax for a taxable plan) and paid by card at once.

Alerts to your office

When a session is marked and a member's allowance drops to **1 left**, your office gets an e-mail and a dashboard to-do ("One session left on a plan for (name)"). When it reaches **0**, you get "Plan allowance used up for (name)". The e-mails go to your accounting e-mail address, or your company address if there is none. Use them to suggest a top-up or an upgrade.

After a plan ends

A session dated inside the last paid period is still covered even if it is marked after the plan has ended. For example, a session on the last evening of the period, completed by the tutor the next morning, is covered.

Bookings from every side

Every place a booking can be made checks the plan the same way. What differs is who is stopped and who only gets a warning.

Who is stopped, who is warned

WHO BOOKS	WHEN THE PLAN WOULD BE OVERDRAWN, UNPAID PAST ITS GRACE DAYS, OR ENDED
Clients (student portal, your booking pages)	Stopped, with the reason.
Agents (parents) booking for a student	Stopped, with the reason.
Practitioners	Stopped, with the reason.
You and your staff	Warned, and the booking goes ahead. Use it for make-up sessions or one-off favours.

The messages

- *"The (plan) plan has 0 sessions left this week. Buy a top-up or upgrade on the My Plans page."* (or "this period" for monthly plans, "hours" for hours plans)
- *"The (plan) plan has a payment due. Book again once it is paid."*
- *"The (plan) plan has ended."*

How "left" is worked out for a booking

Left = the allowance for that week or period, plus any top-up bought for it, less what has been used, less what is already booked and still upcoming in it. A new booking must fit in what is left.

EXAMPLE

Ana's plan includes 4 sessions a month. This period she has completed 1 and has 2 more booked. She can book 1 more. A fifth booking is stopped (or, if your office books it, goes ahead with a warning and is charged at the top-up price or the normal rate when completed).

Repeating series and courses

- A repeating series is checked on **every date**, counting the series' own sessions as it goes. If any date doesn't fit, the message names that date.
- Joining a group course from the portal or your booking pages checks every upcoming session of the course the same way.

Pay-first and prepayment settings

If your account asks clients to pay before booking, or to keep a balance, a session covered by the plan skips that step: the plan fee is the prepayment. If even one session of a series or course is not covered, the usual payment step applies to the booking.

Payment due and grace days

- Grace days count from the day the payment became due. With 3 grace days, a renewal due on May 1 can still be booked against on May 1, 2 and 3, and booking stops on May 4.
- **Allow booking while unpaid** in a member's Settings lifts the stop for that member.
- You and your staff can always book.

After "Cancel at period end"

The plan covers nothing after the end of the paid period. A booking dated after that is not on the plan and is priced and charged as usual.

Package Mode

While Package Mode is on, plans are switched off everywhere: no checks, no coverage, no Plans page.

Renewals and failed payments

Bizstim renews plans automatically early each morning, on the day after each period ends. Here is what happens for each kind of member.

On the renewal date

THE MEMBER	WHAT HAPPENS
Was set to cancel at period end	The plan ends. No charge.
Has a waiting downgrade	Moves to the new plan and is charged its price.
Pays by hand	The new period starts, the fee is added to the account, and the plan shows Payment due . Your office gets an e-mail and a to-do: "Plan payment to collect for (name)... Collect (amount) and record the payment on the plan."
Pays by card	The new period starts, the fee is added to the account and the saved card is charged. Paid: the plan stays Active.
Is on a free plan	Renews at no charge.

Plans set to Inactive keep renewing their current members.

When a card payment fails

- 1 The plan shows **Payment due**. The member gets an e-mail asking them to update their card on the Payments page. Your office gets an e-mail and a to-do with the bank's reason.
- 2 Bizstim tries the card again once a day, up to 3 more times. Each try charges what the renewal still owes.
- 3 If a try succeeds, the plan goes back to Active.
- 4 After 3 failed retries, or if the period ends still unpaid, the plan **ends**. The member gets an e-mail saying the plan has ended and asking them to get in touch; your office gets an e-mail and a to-do. The unpaid charge stays on the account as money owed; refund or remove it by hand if needed.

The member can book during the plan's grace days; after that, booking stops until the payment is in (Chapter 9).

How payments reach plan charges

- Every payment recorded for a client is matched to their unpaid plan charges automatically, oldest charge first. That includes Add Payment, invoice payments, portal and booking-page payments, Quick Pay, Secure Pay and payments through the API.

- When the joining and renewal charges of the current period are fully paid, the plan goes from Payment due to **Active** by itself.
- An unpaid upgrade or top-up charge never puts a plan on Payment due. It stays on the account as money owed.
- Each match shows in the plan's History as a payment applied, naming the payment's date.
- Deleting a payment makes the plan charges it paid owe again.

The student portal: My Plans

Members see their plans on the **My Plans** page of their portal. If you take card payments online, they can also buy plans, top-ups and upgrades there.

My Plans Sessions Payments

YOUR PLANS

LEARN ACTIVE

Left this week: 0 of 1 session

Next Payment: Renews on Nov 19, 2026

This week: Oct 19 to Oct 25

PRICE: \$ 240.00 a month

1 extra session | \$ 65.00 + BUY A TOP-UP Perform | \$ 300.00 ↑ UPGRADE CANCEL AT PERIOD END

PLANS ON OFFER

Once a week One session every week, for steady progress.

LEARN

\$ 240.00 a month

✓ 1 session per week

One 1-hour session a week. Unlimited worksheets, lesson feedback, customized sessions and homework review.

BUY

PERFORM

MOST POPULAR

\$ 300.00 a month

✓ 1 session per week

Everything in Learn, plus 4 extra homework reviews, school teacher collaboration, a 1-hour consultation and lesson recordings.

BUY

Twice a week Two sessions every week, for faster results and exam years.

PRACTICE

\$ 440.00 a month

✓ 2 sessions per week

Two 1-hour sessions a week. Unlimited worksheets, lesson feedback, customized sessions and homework review.

BUY

EXCEL

BEST VALUE

\$ 520.00 a month

✓ 2 sessions per week

Everything in Practice, plus 6 extra homework reviews, school teacher collaboration, a 1-hour consultation and lesson recordings.

BUY

My Plans in the student portal.

What members see

- Each plan they hold: its name, Active or Payment due, "Left this week: 2 of 4 sessions" with a bar, the dates of the current week or period, the next payment date (or "Ends after (date)") and the monthly price.
- On a plan with a payment due: a yellow note with a link to the Payments page.

- **Plans on offer:** your active plans that are Available online with a price above 0, under their category headings, with highlight labels.

What members can do

ACTION	RULES
Buy a plan	Needs a saved card; without one they are sent to the Payments page to save one first. Paid by card at once; the plan is Active straight away and renews by card. Overlapping plans are refused (Chapter 4).
Buy a top-up	Shown when the plan has a top-up price. 1 to 5 extra sessions or hours for the current week or period.
Upgrade	Lists your online plans that cost more and count the same way over the same period. Charged the difference for the days left, like an office upgrade. Cheaper plans are changed by your office: <i>"Choose a plan that costs more. Cheaper plans are changed by the office."</i>
Cancel at period end	The plan ends after the paid period. Keep plan undoes it.

Prices are always worked out by Bizstim at the moment of payment, from the plan itself.

When My Plans is not shown

- Clients who are not allowed to see prices (the hide costs setting) don't have a My Plans page.
- Accounts in Package Mode have no plans.
- Without online card payments (Stripe, with client payments turned on), members still see their plans but can't buy, top up or upgrade.

Your public Plans page

Your branded booking pages can carry a **Plans** page where anyone can see your online plans and buy one, without logging in to the portal first.

905-555-0142
hello@maplelearning.example

Maple Learning Centre
Home
About
Contact
Book Now
Log in

Plans

Single Session
Groups & Courses
Plans

Once a week

One session every week, for steady progress.

Learn
\$240.00 /month
One 1-hour session a week. Unlimited worksheets, lesson feedback, customized sessions and homework review.

- ✓ 1 session per week
- ✓ Math Tutoring
- ✓ Reading and Writing
- ✓ Science Tutoring

Choose

MOST POPULAR
Perform
\$300.00 /month
Everything in Learn, plus 4 extra homework reviews, school teacher collaboration, a 1-hour consultation and lesson recordings.

- ✓ 1 session per week
- ✓ Math Tutoring
- ✓ Reading and Writing
- ✓ Science Tutoring

Choose

Twice a week

Two sessions every week, for faster results and exam years.

Practice
\$440.00 /month
Two 1-hour sessions a week. Unlimited worksheets, lesson feedback, customized sessions and homework review.

- ✓ 2 sessions per week
- ✓ Math Tutoring
- ✓ Reading and Writing
- ✓ Science Tutoring

Choose

BEST VALUE
Excel
\$520.00 /month
Everything in Practice, plus 6 extra homework reviews, school teacher collaboration, a 1-hour consultation and lesson recordings.

- ✓ 2 sessions per week
- ✓ Math Tutoring
- ✓ Reading and Writing
- ✓ Science Tutoring

Choose

Maple Learning Centre
905-555-0142
hello@maplelearning.example

PAGES
Home
About
Contact
Book Now
Log in

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Website by Bizstim

The public Plans page on your branded booking pages.

When it appears

All of these must be true:

- Your subscription includes Plans and Package Mode is off.

- At least one plan is **Active, Available online** and priced above 0.
- Your account takes card payments online through Stripe, with client payments turned on.

It does not depend on your online booking switch: the Plans page can be live even with online booking off.

Where it is linked

- The switch at the top of your booking pages (Single, Groups & Courses, On-Demand) gains a **Plans** button.
- On your website and branded pages, the menu shows **Book Now** or **Plans**, never both. Plans takes the menu spot only while online booking is off.

What visitors see

One card per plan, under your category headings: name, price per month, "Plus tax where it applies" for taxable plans, the description, the allowance, each covered service, any highlight label, and a **Choose** button. Only services that are active and visible to all users are listed.

After Choose: the sign-in step

THE VISITOR PICKS	WHAT HAPPENS
Login (existing client)	Username and password, then straight to the plan payment page. Inactive accounts are refused: <i>"Your account is not active. Please contact us."</i>
Login (agent / parent)	After logging in they pick which of their active students the plan is for, then go to the payment page. The plan goes on that student.
Create Account	Only when your booking settings allow new accounts. The account is made, then the visitor goes to the payment page.
Guest	Only when your booking settings allow guests. The visitor's details become a prospect with a Sales Manager note and a to-do, and your office gets an e-mail. The visitor sees <i>"Your request was sent. Thanks for your interest in our plans. We'll follow up with you shortly."</i> Nothing is charged; you follow up.

The plan payment page

905-555-0142
hello@maplelearning.example

Maple Learning Centre
Home
About
Contact
Book Now
Log in

Plan Payment

All credit card transactions will have a convenience fee added in the amount of 2.90% + \$0.30, unless specified exceptions apply.

Learn

TOTAL
\$ 240.00

The plan starts as soon as this payment goes through.

Plan Learn

Price \$ 240.00

For Liam Carter

For assistance please use the contact information above. If this is a public computer, close the browser when you are done.

Payment Details

Payment Amount	\$ 240.00
Convenience Fee	\$ 7.48
Grand Total	\$ 247.48

Secure, fast checkout with Link

Card number

1234 1234 1234 1234

Expiration date

MM / YY

Security code

CVC

Country

Canada

Postal code

M5T 1T4

Optional

Save my information for faster checkout

Email

you@example.com

Mobile number

(506) 234-5678

Full name

First and last name

link - By providing phone number and email, you agree to create an account subject to Link's Terms and Privacy Policy.

Discount code (optional)

Check

* If you proceed you are agreeing to our terms and conditions.

Pay \$ 247.48

Maple Learning Centre
905-555-0142
hello@maplelearning.example

PAGES
Home
About
Contact
Book Now
Log in

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Website by Bizstlm

The plan payment page.

- The visitor pays with a saved card or types a new one. Banks that ask for a security check (3D Secure) are handled on the page.
- A **discount code** can be entered. The charge after the discount must be at least 0.50; otherwise *"This plan cannot be paid online with that discount. Please contact us."*
- If you add a convenience fee to card payments, the page shows it and adds it to the total.

- The price is worked out by Bizstim, never taken from the page. The plan is applied only once Stripe confirms the payment, and starts Active, paid by card.

Your follow-up to-do

When a client (or agent) reaches the payment page, Bizstim writes a Sales Manager note and a to-do so your office can follow up if they leave without paying. When they pay, the to-do closes itself and the note stays as the record. A client who comes back for the same plan reuses the open to-do rather than getting a second one.

Security and permissions

Who can do what

ROLE	PLANS ACCESS
Account owner (admin)	Everything: plans, categories, members, enrolling, payments.
Staff	The same Plans page, only with the Manage Plans permission turned on. Without it: <i>"You don't have permission to manage plans."</i> Staff can book past a plan's limits with a warning, and use the session tick box.
Practitioners	No Plans page. In the booking list they see the plan name and what is left, never prices or payment states. They are stopped by the plan's limits like clients.
Clients	My Plans in the portal (when allowed to see prices). Buy, top up, upgrade and cancel at period end. Stopped by the plan's limits.
Agents (parents)	Buy a plan for one of their assigned active students on your public Plans page. Stopped by the plan's limits when booking.
Visitors	See your online plans on the public Plans page; buy after logging in or creating an account, or send a guest request.

Built-in protections

- Prices, upgrade differences and top-up totals are always worked out by Bizstim from the plan at the moment of payment.
- A plan can only cover your own services, never the Smart Learn system service.
- A plan sold online can only cover services every client can see and book.
- Services can't be retired or hidden out from under paying members ([Chapter 4](#)).
- Clients holding a plan can't be set inactive, and clients with plan history can't be deleted ([Chapter 7](#)).
- Every change to a membership is written to its History with the date.

Money, invoices and reports

Plan money uses the same accounting as your session fees, so balances, invoices and reports stay in step.

Plan charges

Each plan fee (joining, renewal, upgrade difference, top-up) is a charge on the client's account, dated the day it was added, with tax worked out from the client's state for a taxable plan. The client's balance updates straight away. Sessions covered by the allowance are \$0; sessions past it carry the top-up amount or the normal rate.

Where plan money shows

PLACE	WHAT YOU SEE
A client's account balance history	Plan charges are listed with the type Plan , next to Service Cost, Payment and Credit lines.
Service Summary	The Plans option in the service filter shows plan fees, one line per plan name. Covered sessions show with "(plan)" after their status.
Invoices	Unpaid plan charges dated in the invoice's range are added as line items, for example "Math Weekly (plan fee) 2026-11-01". A part-paid charge shows what remains, marked "(remaining)". Paid charges are left off. For invoices of scheduled sessions, the plan charges come from the range just before the invoice range.
Card payments (Stripe)	Described as "Plan: (name)", with the period in the payment note.
QuickBooks	When your session invoices go to QuickBooks, each plan charge is sent as a debit named "Plan: (name)".
Dashboard	Monthly tax collected includes tax on plan fees.
Plan History	Every charge, payment applied, failed card and change for one membership (Chapter 7).

Refunds

Plans never refund automatically, including when you use End now. To refund, use the Payments page as you would for any payment.

Troubleshooting

Every message the Plans feature can show, what it means, and what to do.

Building and editing plans

MESSAGE	WHAT TO DO
A plan offered online needs a price above 0.	Give the plan a price, or untick Available online. Free plans are enrolled by your office only.
A plan offered online needs at least one active service.	Make one of the covered services active, add an active service, or untick Available online.
A plan sold online can only cover services set to Visible to all users...	Set the named services to Visible to all users on the Services page, untick Available online, or set the plan to Inactive.
(N) upcoming sessions of this plan's members use a service you removed. Complete or move them first.	Complete, cancel or move those sessions to another service, then remove the service from the plan.
Counting and the allowance period are locked once the plan has members.	Make a new plan with the counting and period you want (Chapter 5).
The allowance must be a whole number unless the plan counts hours.	Use a whole number, or switch the plan to count hours (only before anyone has held it).
Choose at least one service the plan covers.	Tick at least one service.
This plan has members, past or present. Set it to Inactive instead.	Plans with history can't be deleted. Set it to Inactive.
There is already a category with that name.	Category names are unique on your account (capitals don't count). Pick another name.
Plans use this category. Move them to another category, or to No category, first.	Edit the plans in that category, then delete it.

Enrolling and managing members

MESSAGE	WHAT TO DO
This plan shares a service with the (name) plan already held. End that plan first, or choose another.	A member can't hold two plans on one service. End the other plan, or choose a plan without that service.

That plan is not available.	The plan is inactive (or no longer sold online). Set it to Active, or choose another.
There is no card on file.	The client needs a saved card for card payments. Use By hand, or ask them to save a card on their Payments page.
The card was declined: (reason)	Nothing was charged and nothing changed. Try another card or pay by hand.
Enrolled, but the payment was not recorded: (reason)	The member is enrolled with Payment due. Record the payment from Add Payment.
Plans must count the same way over the same period to switch...	End the current plan and enrol on the other one.
That is the current plan.	Pick a different plan. (Picking the current plan only withdraws a waiting change.)
This plan has ended.	Ended plans can't be changed. Enrol the client again if needed.
(Name) holds the (plan) plan and cannot be set to inactive...	End the plan on the Members tab first, then change the client's status.

Bookings and the portal

MESSAGE	WHAT TO DO
The (plan) plan has (N) sessions left this week. Buy a top-up or upgrade on the My Plans page.	The member buys a top-up or upgrades, or your office books it (with a warning).
The (plan) plan has a payment due. Book again once it is paid.	Record the payment, or turn on Allow booking while unpaid in the member's Settings.
The (plan) plan has ended.	The member needs a new plan to book on it.
(Service) was not changed: it has (N) upcoming sessions... / it is covered by the (name) plan...	Complete or move the sessions and take the service off the plan first (Chapter 4).
(Service) was not changed: it is covered by the (name) plan, which is sold online...	Untick Available online on the plan, or take the service off it, before hiding the service.
Save a card on the Payments page first.	Members must save a card before buying in the portal.
Top-ups are not offered on this plan.	Give the plan a top-up price above 0 if you want to sell top-ups.
Choose a plan that costs more. Cheaper plans are changed by the office.	Downgrades are made by you or your staff with Change plan.

Your payment was received but the plan could not be updated. The office has been told.	Rare. Your office gets an e-mail and a to-do. Check the payment and update the plan by hand.
Plans are not available online right now.	Check the conditions in Chapter 12 : an active online plan priced above 0, and online card payments on.
Your account is not active. Please contact us.	The client record is inactive. Reactivate it if the client should be able to buy.
This plan cannot be paid online with that discount. Please contact us.	The discount brings the charge under 0.50. Enrol the client from the office instead.

Page access

MESSAGE	WHAT TO DO
Your account plan does not have access to Plans.	Your Bizstim subscription doesn't include Plans. Contact Bizstim to change subscription.
Plans are not available while Package Mode is on.	Plans and Package Mode can't be used together.
You don't have permission to manage plans.	The account owner turns on Manage Plans for the staff member.

Still stuck? Contact Bizstim support from the Help Center. Tell us the plan name, the member and what you saw on screen.

Moving from subscription services

Before Plans, a membership in Bizstim was a service marked as a subscription. Plans replace that setting. This chapter explains why, what happens to your old subscription services, and how to move your subscribers.

How subscription services worked

A service with **Subscription or Membership?** set to Yes (marked with a gift icon on the Services page) was a way to charge a fee. To bill a subscriber, you added a session on that service. Bizstim saved it, marked it completed straight away so its price went on the account, and could record a payment and e-mail a receipt at the same time. That was the whole feature: one charge each time you added one.

Why Plans are better

	SUBSCRIPTION SERVICE (OLD)	PLAN (NEW)
Billing every month	You added a "session" by hand each time.	Renews by itself on each member's renewal date (Chapter 10).
Card payments	Recorded by hand when you added it.	The saved card is charged on every renewal, with automatic retries and e-mails when a card fails.
What the fee includes	Nothing was linked. Lessons were booked and charged separately, or not tracked at all.	An allowance of sessions or hours on the services you choose, counted automatically (Chapter 8).
Booking limits	None. Members could book anything.	Clients and practitioners are stopped at the allowance, when payment is overdue, or after the plan ends; your office gets a warning (Chapter 9).
Extra sessions	Charged at the normal rate, with no link to the subscription.	Top-ups at your price, or the normal rate (your choice).
Missed and cancelled sessions	No rules.	Your rules, per plan, per member and per session.
Changing plan	Not possible; you worked it out by hand.	Upgrade now with a fair prorated charge, or downgrade at renewal.
Cancelling	You simply stopped adding the charge.	Cancel at period end or end now, by your office or by the member.
Selling online	Not possible.	The student portal and your public Plans page, paid by card (Chapters 11 and 12).

Your calendar	Every charge was a pretend session in your session lists and history.	Fees are account charges; your calendar shows only real sessions.
Seeing who is a member	No list.	The Members tab: status, what is left, the next renewal, history.

What happens to your old subscription services now

- **No new subscription services.** New services can't be marked as subscriptions, on the Services page or through the API ("*Subscription services are replaced by Plans.*").
- **Adding a session on an old subscription service no longer completes it or records a payment.** It is saved like any other session.
- Sessions on a subscription service can't be scheduled through the Bizstim API.
- Your past subscription charges, payments and receipts stay exactly as they were, in every report.
- An old subscription service still shows **Subscription or Membership?** on its edit page, with the note "*Replaced by Plans. Choose No to stop treating this service as a subscription. It cannot be turned back on.*"

Moving your subscribers to a plan

- 1 **Make a plan** for each subscription you sold ([Chapter 2](#)). Use the same monthly price. Under **Covers these services**, tick the services your members actually book lessons on, not the old subscription service: the plan charges the monthly fee itself. Set the allowance to what the subscription was meant to include.
- 2 **Enrol each subscriber** on the Members tab ([Chapter 6](#)). Choose Card on file for members who pay by card so renewals charge automatically.
- 3 **Pick the start day with care.** A plan starts and charges on the day you enrol. Enrol each member on the day their next subscription charge would have been due, so nobody is charged twice for the same month. If they already paid this month's subscription, enrol with **Record payment now** and the amount received so the first plan fee is covered.
- 4 **Stop adding subscription sessions** for members who are on a plan.
- 5 **Retire the old service.** Edit it, set **Subscription or Membership?** to No and save. You can also make it inactive once it has no upcoming sessions.

Keep the old names

Give each plan the name your members already know (for example "Gold Membership"). They will see it on their plan card, in the booking list and on their receipts.