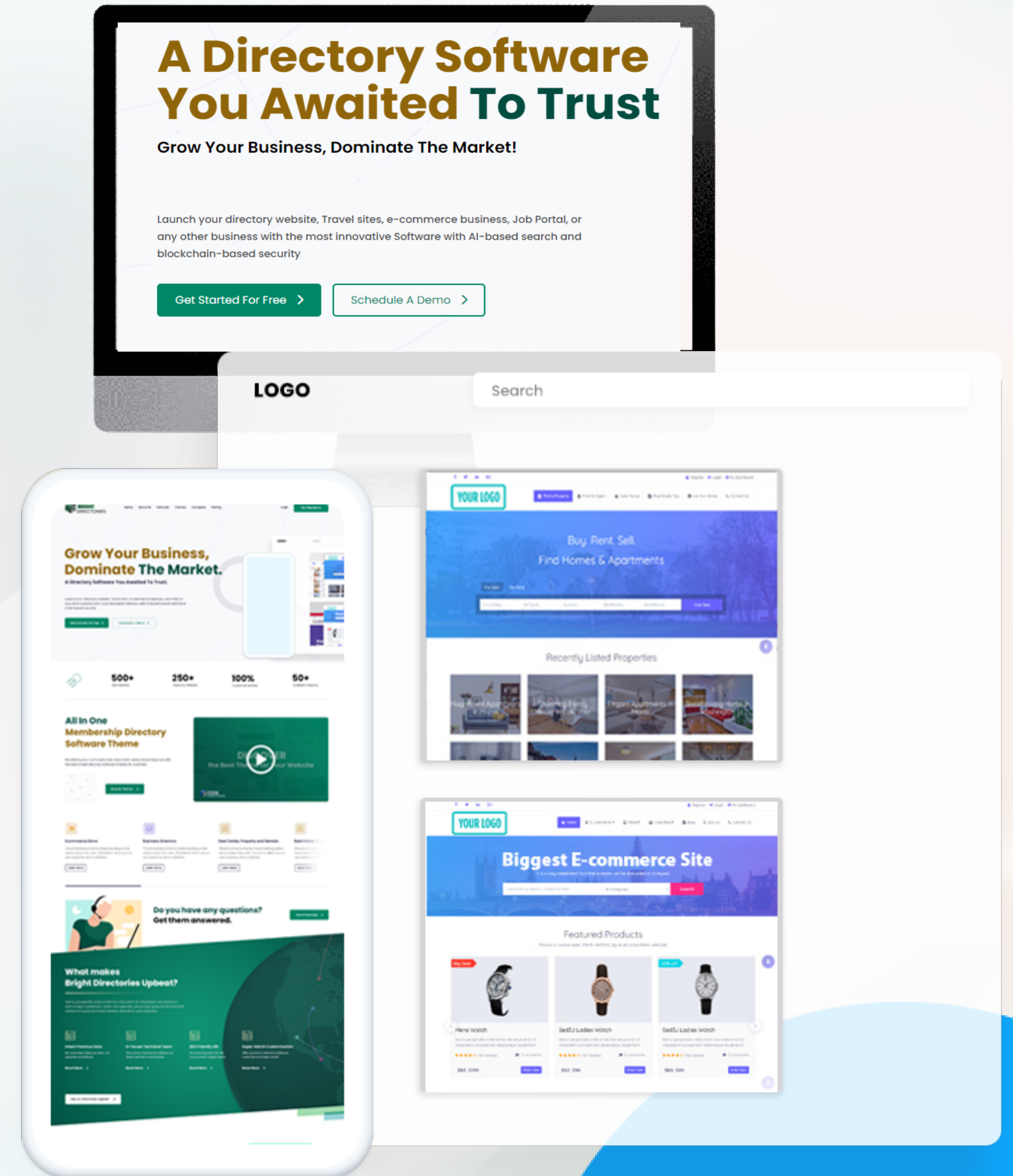




**BRIGHT**  
DIRECTORIES

# Manage Membership Plans and Transactions on the Website

[www.brightdirectories.com](http://www.brightdirectories.com)



# Manage Products



Here you can add and edit membership plans for your website.

When you click on this option, it will take you to a new tab where you can make the necessary changes.

Dashboard /Membership Plan

[+ Add New Membership Plan](#)

**MANAGE MEMBERSHIP PLAN(1)**

PLAN NAME	SIGN UP MEMBERS	PRIVILEGES	PLAN PRICING	ACTION				
Ex Plan ID: 1 paid Account	0	<a href="#">Add to Favorites</a> Search Priority: 03 Category Limit: 01	<table border="1"><tr><td>Yearly</td><td>1500.00</td></tr><tr><td>Lead Price</td><td>0.00</td></tr></table>	Yearly	1500.00	Lead Price	0.00	Action <a href="#">Sign Up Page</a>
Yearly	1500.00							
Lead Price	0.00							

# Add Membership Plan



- To add a new membership plan, click “Add Membership Plan” present above.
- A dialogue box will appear requiring a few pieces of information.
- Plan Name - You can give any creative name for your membership plan.
- Account Type - you can set it to either paid or free.
- Preferred Billing Type - You can set this as yearly, quarterly, semi-yearly, or monthly.
- Mention the price of the membership plan in the specific section of the particular billing type you have chosen.
- Next, mention the price to purchase leads.
- Then you can add the features of the membership plan that you are willing to provide.
- To add multiple features to the plan, click the “Add” button present on the right-hand side.
- Give a final check to each section and then click “Submit” to add the membership plan.

+ Add New Membership Plan



### Add Membership plan

<b>Membership Plan Name</b> <input type="text"/>	<b>Account Type</b> <input type="text" value="Paid"/>
<b>Preferred Payment Term</b> <input type="text" value="Yearly (Bill once per year)"/>	<b>Monthly Price (billed every 30 days)</b> <input type="text"/>
<b>Quarterly Price (billed every 3 months)</b> <input type="text"/>	<b>Semi-Yearly Price (billed every 6 months)</b> <input type="text"/>
<b>Yearly Price (billed every 12 months)</b> <input type="text"/>	<b>Price to Purchase Leads</b> <input type="text"/>

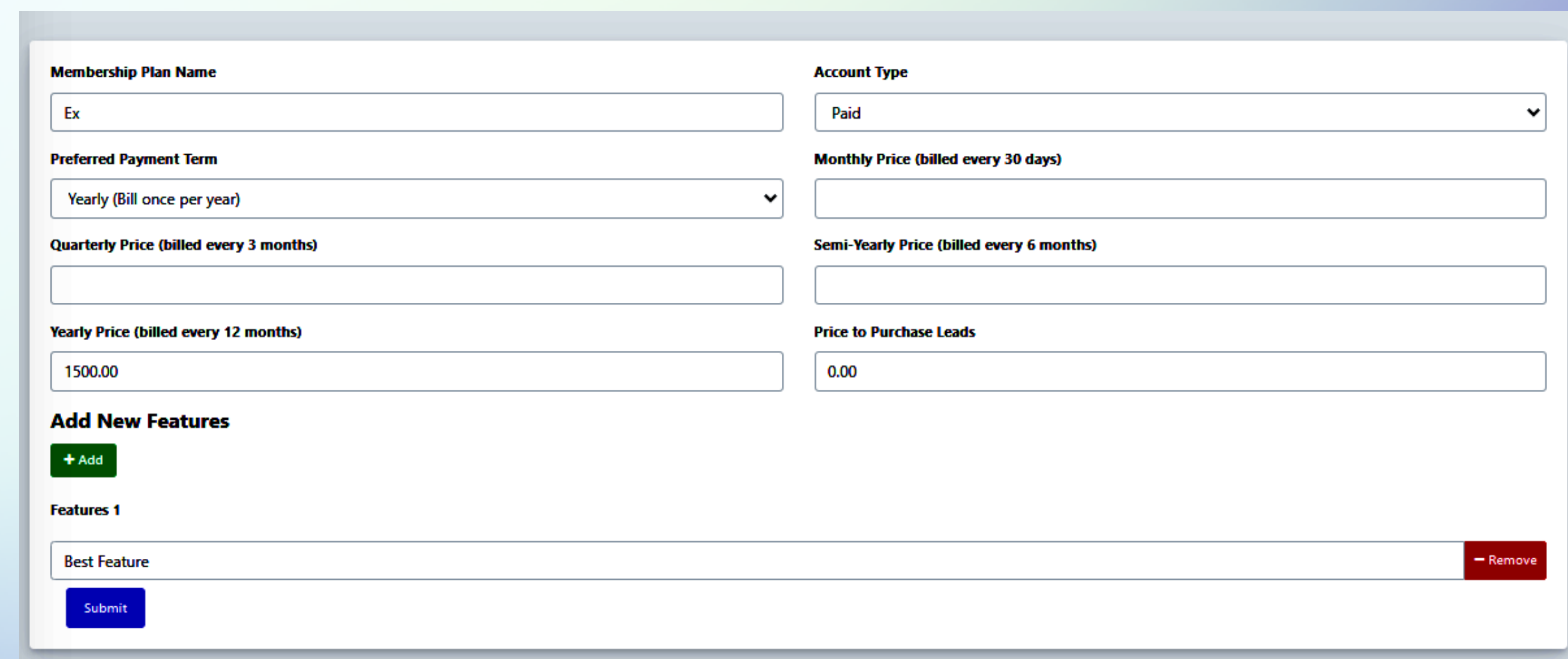
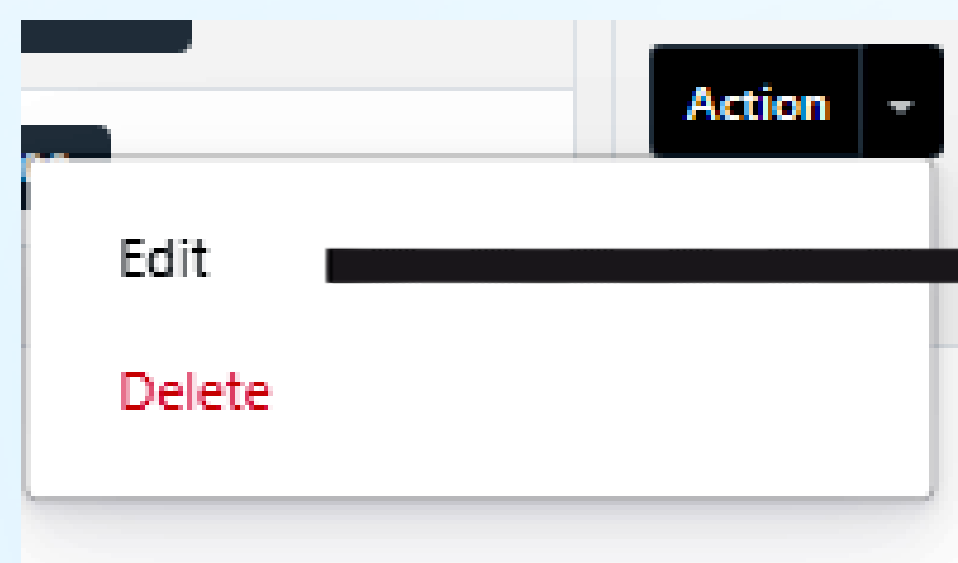
**Add New Features**

Features 1

Feature

# Edit/Delete Existing Plan

- If you wish to edit or delete any existing membership plan, you can do it here.
- This list will consist of all the membership plans added to your website.
- To delete a particular plan, click the “Action” present on the right-hand side of each plan.
- Then from the drop-down, click “delete”
- To edit any information about a particular plan, click “edit” from the “Action”
- Make your required changes and then click “Submit”



A screenshot of the membership plan edit form. The form contains several fields and sections:

- Membership Plan Name:** A text input field with the value 'Ex'.
- Account Type:** A dropdown menu with the value 'Paid'.
- Preferred Payment Term:** A dropdown menu with the value 'Yearly (Bill once per year)'.
- Quarterly Price (billed every 3 months):** An empty text input field.
- Yearly Price (billed every 12 months):** A text input field with the value '1500.00'.
- Monthly Price (billed every 30 days):** An empty text input field.
- Semi-Yearly Price (billed every 6 months):** An empty text input field.
- Price to Purchase Leads:** A text input field with the value '0.00'.
- Add New Features:** A section with a green '+ Add' button.
- Features 1:** A section with a text input field containing 'Best Feature' and a red '- Remove' button.
- Submit:** A blue 'Submit' button at the bottom of the form.

Give a final check to each section and then click “Submit” to add the membership plan.



If you want to see the signup page that your customers will see when they apply for the membership, just click on the “Sign Up Page” button present on the extreme right-hand side of the particular plan.

Sign Up Page



Ex PLAN

Register

First Name

Last Name

Enter Email

Create Password

Confirm Password

Enter Billing Information

Name On Card

Company Name

Street Address

Country

State

City

Postal Code

Enter Your Payment Information

Card number  MM / YY CVC

Create My Profile

# Transaction History



This section lets you search for a transaction through various channels and also a list of successful payments, upcoming payments, pending payments, payments that were refunded, and stopped payments.

As you can see here, there are 7 channels through which you can search for particular transaction details. You can search through:

- Name/ID
- Email Address
- Membership Plan Type
- Type of Billing Cycle
- Account Status of the Member (Active/Inactive)
- Date Range
- Invoice ID

After choosing your preferred channel and providing the necessary information, click “Search Transaction” and the list will be displayed immediately.

The screenshot shows a web interface for 'Billing History'. At the top, there's a breadcrumb 'Dashboard / Billing History'. Below it is a search section with the following fields: 'Name or ID', 'Email Address', 'Select Plan' (dropdown), 'All Billing Cycle' (dropdown), 'Member Account Status' (dropdown), 'Date Range', and 'Invoice ID'. There are 'Search Transaction' and 'Reset' buttons. A summary row shows: 'Payments Received (0) \$0', 'Upcoming Payment (0) \$0', 'Pending Payments (0) \$0', 'Refunded (0) \$0', and 'Stopped (0) \$0'. A blue banner reads 'These Are Successful Payments You've Received.' Below is a table with columns: 'Sl No.', 'Invoice ID', 'Date & Time', 'Member', 'Product', 'Amount', and 'Actions'. The table is currently empty, displaying 'No Data Found'.

# View Transaction of Previous Hosting Server

if you have used more than 1 hosting server, this button will show you all your transactions made from all the previous hosting servers in a similar format.

→ Now let's discuss how you can view transactions in a detailed manner.

There are 5 types of transaction lists as you can see here:

# Payment Received

The first one is the payment received section, which gives you the entire list of all the payments you have received from the members along with their details and the total amount.

You can see their invoice ID, the date & time of the payment, details of the member, the type of membership plan the person has chosen, the amount of the payment, and a Details “Action” section that has 3 options – Download Invoice, Refund Payment, and Cancel Subscription.

When you click “Download Invoice”, you will get an invoice of the transaction in PDF format. You can download the document by clicking on the download icon present in the upper right corner of the document.

Payments Received (1)  
**\$1,500**

Upcoming Payment (1)  
 \$1,500

Pending Payments (0)  
 \$0

Refunded (0)  
 \$0

Stopped (0)  
 \$0

These Are Successful Payments You've Received.

Sl No.	Invoice ID	Date & Time	Member	Product	Amount	Actions
1	EF3FD137-0001	Nov-20-2023	<div style="display: flex; align-items: center;"> <div> <p><b>ID:</b> 99 <span style="float: right; background-color: #28a745; color: white; padding: 2px 5px; border-radius: 10px; font-size: 0.8em;">Active</span></p> <p><b>Name:</b> apoorva nayak</p> <p><b>Email:</b> demo@brightadmindemo.com</p> <p><b>Phone Number:</b></p> </div> </div> <div style="text-align: right; margin-top: 5px;"> <span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 10px; font-size: 0.8em;">View More</span> </div>	Ex	\$1500.00	<span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 10px; font-size: 0.8em;">Details</span>

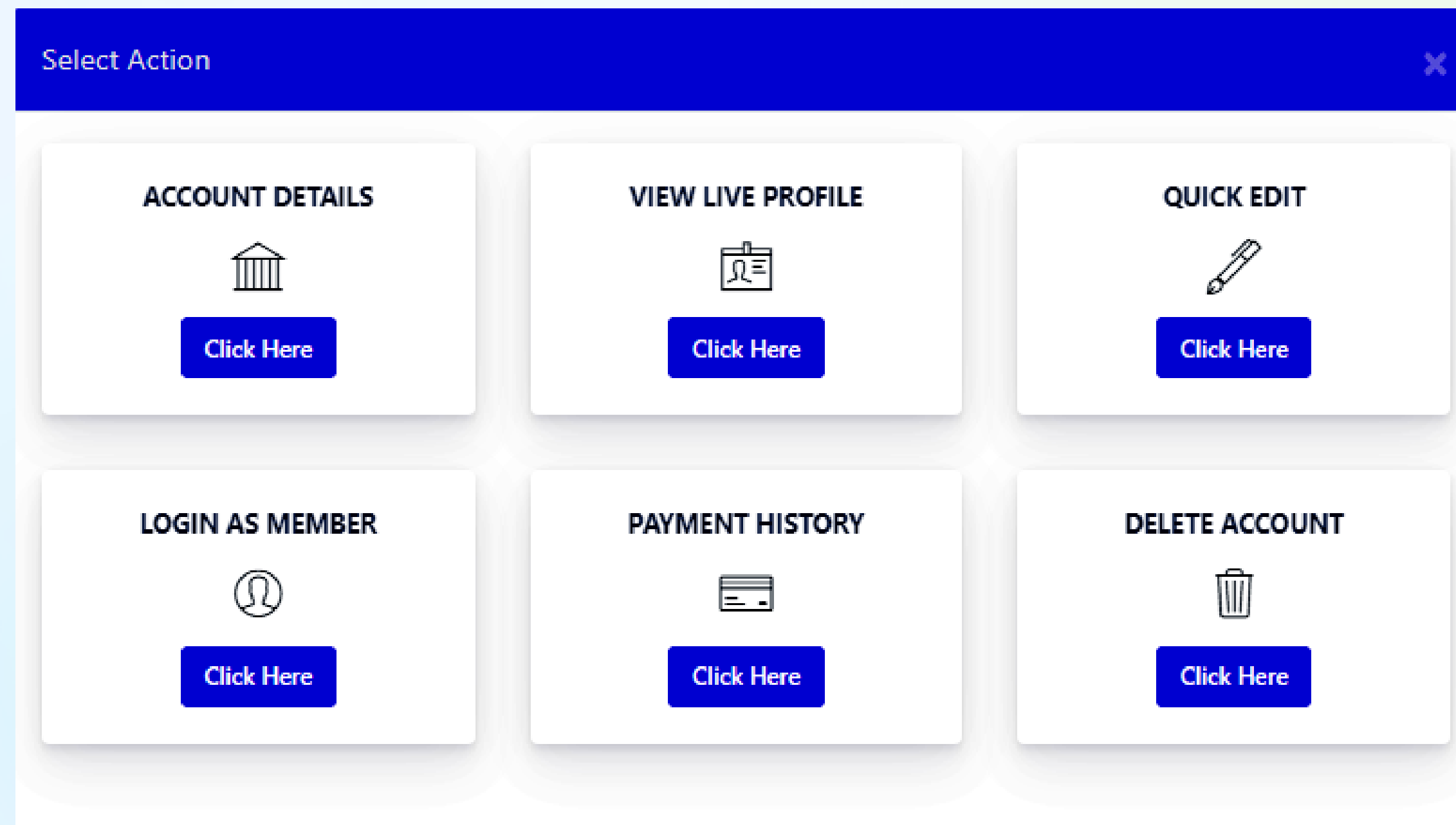
Download Invoice  
Refund Payment  
Cancel Subscription



# Refund Payment

The “Cancel Subscription” option as the name suggests will immediately delete the subscription of the particular member.

This “View More” option just beside each member's details opens a dialogue box where you get these 6 options – Account Details, View Live profile, Quick Edit, Login As A Member, Payment History, and Delete Account. For all these processes, refer to – Members – Search Members – Action.



# Upcoming Payment



This section will give you the list of upcoming payments from the members and the total amount.

As you can see, you will get the date of the upcoming payment, details of the member, the type of subscription the member has chosen, the amount to be paid, and a “Details” button that has the option to cancel the subscription.

The “View More” option just beside each member's details opens a dialogue box where you get these 6 options – Account Details, View Live profile, Quick Edit, Login As A Member, Payment History, and Delete Account. For all these processes, refer to – Members – Search Members – Action.

Payments Received (0) \$0	<b>Upcoming Payment (0) \$0</b>	Pending Payments (0) \$0	Refunded (0) \$0	Stopped (0) \$0
These Are Upcoming Payments				
Sl No.	Date & Time	Member	Product	Amount
No Data Found				

# Pending Payments



This section will show you the list of members who have their payments pending for their subscriptions.

You can see the invoice ID of the member, the last date of the payment, member details, the subscription type of the member, and the amount pending.

Payments Received (0) \$0	Upcoming Payment (0) \$0	<b>Pending Payments (0) \$0</b>	Refunded (0) \$0	Stopped (0) \$0
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These Are Successful Payments You've Received.

SI No.	Invoice ID	Date & Time	Member	Product	Amount
No Data Found					

# Refunded



This section shows how much and how many payments were refunded and to which members.

As you can see the list consists of the invoice ID of the member, the status of the payment (i.e. “Refunded”), the date & time of the refund, details of the member, their subscription type, the amount refunded, and the “Details” button consists of the option to download the invoice.

The “View More” option under each member's details opens a dialogue box where you get these 6 options – Account Details, View Live profile, Quick Edit, Login As A Member, Payment History, and Delete Account. For all these processes, refer to – Members – Search Members – Action.

Payments Received (0) \$0	Upcoming Payment (0) \$0	Pending Payments (0) \$0	<b>Refunded (0) \$0</b>	Stopped (0) \$0		
These Are Successful Payments That Were Refunded.						
SI No.	Invoice ID	Date & Time	Member	Product	Amount	Actions
No Data Found						



# Stopped



This section shows you the payments that are stopped.

In this list, you can see the member's invoice ID, the status of the payment (i.e. Cancelled), the date & time of the refund, details of the member, their subscription type, the amount of the subscription, and the "Details" button consists of the option to "refund" the payment.

The "View More" option under each member's details opens a dialogue box where you get these 6 options - Account Details, View Live profile, Quick Edit, Login As A Member, Payment History, and Delete Account. For all these processes, refer to - Members - Search Members - Action.

Payments Received (0) \$0	Upcoming Payment (0) \$0	Pending Payments (0) \$0	Refunded (0) \$0	<b>Stopped (0) \$0</b>		
These Are Stopped Payments						
SI No.	Invoice ID	Date & Time	Member	Product	Amount	Actions
No Data Found						

# Payment Gateways


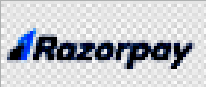
Let's see how we can add payment gateways to carry out the transactions on the website.

- On the dashboard, click on the "Add Payment Gateway" option.
- A new tab will open where you can set up the payment gateway.

Dashboard / Payment Gateway Setup

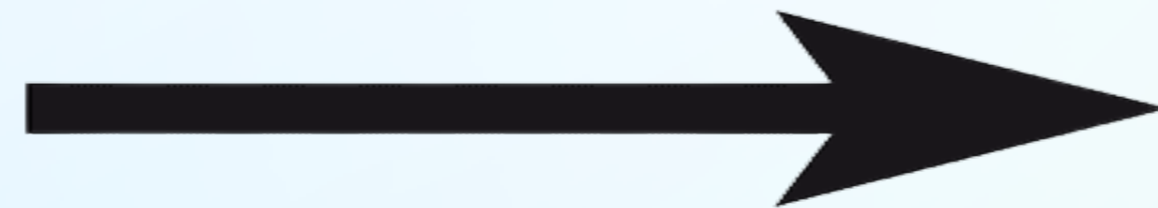
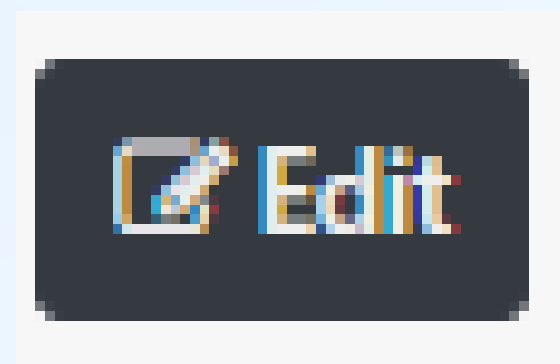
[View Transactions](#)

### MY PAYMENT GATEWAYS

PAYMENT GATEWAY NAME	ACTION
<span>Active</span> 	<a href="#">Edit</a>
<span>Inactive</span> 	<a href="#">Set as active</a>

- When you buy a directory theme from Bright Directories, you will get the "Stripe" payment gateway pre-integrated for the website.

- You just have to enter the generated Stripe Publishable Key and Secret Key.
- To do this, click the “Edit” button beside the payment gateway.
- A dialogue box will appear where you have to provide the necessary keys.
- After providing the information, click on “Submit”
- Your payment gateway will be added.



Stripe ×

**Publishable key:**

**Secret Key:**

**Submit**

If you want to integrate multiple payment gateways into your website, contact Bright Directories and we will add it for you.

# Contact Us

**Call Us: 503-928-5984**

**Email Us: [support@brightdirectories.com](mailto:support@brightdirectories.com)**

**Web: [www.brightdirectories.com](http://www.brightdirectories.com)**

**Reach us if you need technical support:**

**<https://support.brightdirectories.com/>**

