## Create a Free Trial Subscription Promotion

This article applies to:

Max Classic

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A subscription free trial delays the first charge of a recurring billing program so you can use a free trial period to eliminate the purchase barrier by providing a "try before you buy" offer. The customer does not get billed immediately, but is required to enter credit card information during the purchase. When the trial expires, Max Classic will automatically bill the first charge and every charge thereafter, until the program is canceled. You define the number of free trial days along with any other eligibility criteria.

Important Note! Promo Code criteria will not operate on legacy order forms or legacy shopping cart.

## 1. Go to E-Commerce > Promotions

	MARKETING	E-COMMERCE	ADMIN
s	Campaign Builder	E-Commerce Setup	Branding Center
S	Email & Broadcasts	Orders	Billing & Account Info
inities	Lead Generation	Products	Users
Partners	Templates	Actions	Import Data Promo
	Legacy	Promotions	Data Cleanup
ntegrations		Legacy	Stealth
Settings	Reports Settings	Reports Settings	Reports Settings

## 2. Select Subscription Free Trial from the drop-down.

		Add New
		Add New Order Total Discount
cription	Delete	Shipping Discount
	Delete	Subscription Free Trial Category Discount Upsell

- 3. Enter the following details...
  - Name: The name only shows up for your users. It should be short but descriptive (e.g. 30 Day Free

Trial.)

- **Description**: The description is used to further describe the benefits of the discount, but it only shows up for customers in the order summary section of the legacy shopping cart. It also shows up on legacy order forms, legacy receipts, and legacy invoices. It can further describe the discount benefits.
- Subscription Plan: Select a subscription plan from the drop-down.
- Free Trial Days: Enter a number of days to delay the first billing for the subscription program. This number will show up on the shopping cart summary.
- **Hide Price**: Choose **Yes** if you do not want the subscription program price and billing cycle displayed in the shopping cart order summary along with the free trial days.

Name	30 Day Free Trial	
Description	30-Day Free Trial	
	83 characters left (Some special cl	haracters like < or > may count as
Subscription Plan	Weekly Pool Checkup - Every r 🔻	
Free Trial Days	30	
Hide Price?	Yes 🖲 No	

## 4. Click Save

Free Trial Days	30
Hide Price?	Yes 🖲 No 🔘
Save	
	17

- 5. Enter the criteria in which the promotion will be available. These criteria define one or more condition that must be true for the discount to apply. If you set up more than one criteria, they must ALL be true to make the purchase eligible for the discount. Please note that the subscription product selected in step 3 does not need to be added to the criteria in step 5 - this will cause the promotion to not function!
- 6. Click on the Add Criteria drop-down and choose a criteria

Crit	Add Criteria	¥
Des	cription Add Criteria	Edit
No	Crite Date Range Criteria Promo Code Criteria Product/Qty Criteria Subscription Plan in Cart Order Total Criteria	
34		

7. Enter the specific criteria parameters (i.e. start/end date, code, etc.)

formation	Manage Date Range Criteria				
Na Descript					
	Start Date 1	1-18-2019			
	End Date 1	1-30-2019			
Subscription P	Save				

8. Save the criteria and Save the discount.

Example shopping cart free-trial and an example free-trial invoice:

SHOPPING CART			
Name	Price	Qty	Total
Subscription Trial 30 days free, then \$10.00 / month for 12 months Remove	\$10.00 \$0.00	1 Update	\$0.00
Sub Total:			\$0.00
Enter a Promo Code: Apply			
Billing Information			

rder items								Calculate Tax	Add	Order Item
Name	Cost/Unit	Price/Unit	Туре	Total Cost	Total Price	Margin	Fulfillment	Modify Fulf	llment	Remove
Subscription Trial	\$0.00	\$10.00 x 1	Subscription Plan	\$0.00	\$10.00	\$10.00	N/A	N/A		Remove
First month FREE	\$0.00	-\$10.00 x 1	Special: Free Trial Days	\$0.00	-\$10.00	-\$10.00	N/A	N/A		Remove
ORDER TOTAL				\$0.00	\$0.00	\$0.00				
ayments								Add Payment	Refur	nd Payment
Date	Туре	S	tatus		Amo	unt	Note			
11/7/2019	Credit Ca	rd A	PPROVED (Visa xxxxxxxxxx	oox1111)	\$0.00	)	Auto Charge	For Invoice Ids:1	7914	
Payment Total					\$0.0	D				
BALANCE					\$0.0	D				
ommissions										
		-						Recalculate	Create C	ommission
Referral Partner		Commission	1		Item			Sold		Earned
Chrisj		Level 1 Standard Co	ommission Program - Defau	ılt	Subscript	ion Trial -	\$10.00 -	\$0.00		\$0.00
TOTAL COMMISSION	IS							\$0.00		\$0.00
Payment Plan									Edit Pa	vment Plan
Auto Charge: Yes [	View Paymen	t Attempt Hist	ory]						Lotte	, ment hen
Email the invoice	to the custom	er upon succe	essful payment							
Pmt #	Stat	us	AmtDue		Paid			Date		
Pmt 1	Pald		\$0.00		\$0.00	)		11/7/2019		
Save Save & Sear	ch Delete	Preview In	voice Send Invoice	Chargeback Dis	oute Clone	Cr	eated: System Th	ursday, November 7	2019 2:14	:06 PM