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**
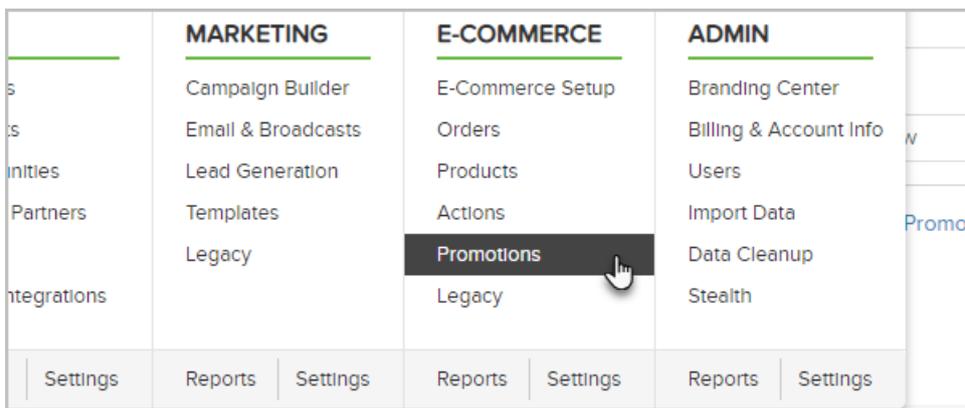
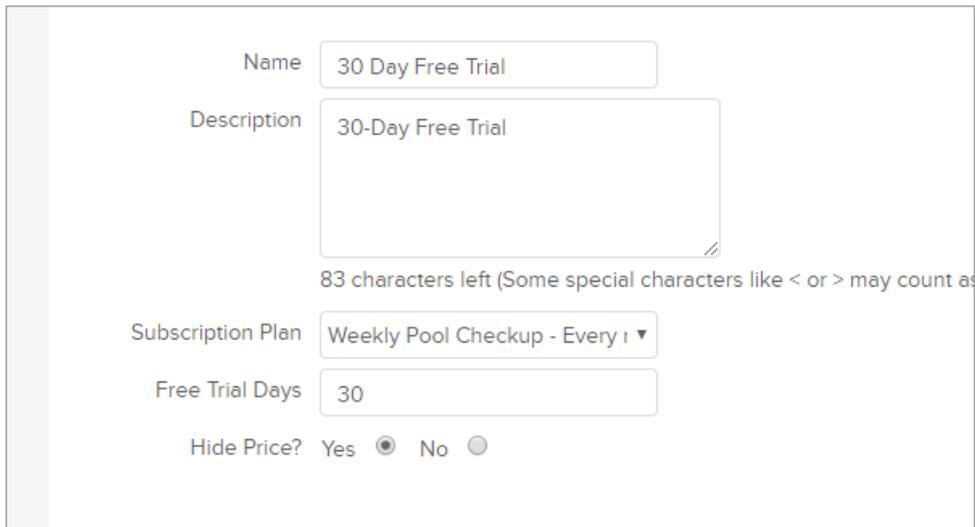2. Select **Subscription Free Trial** from the drop-down.
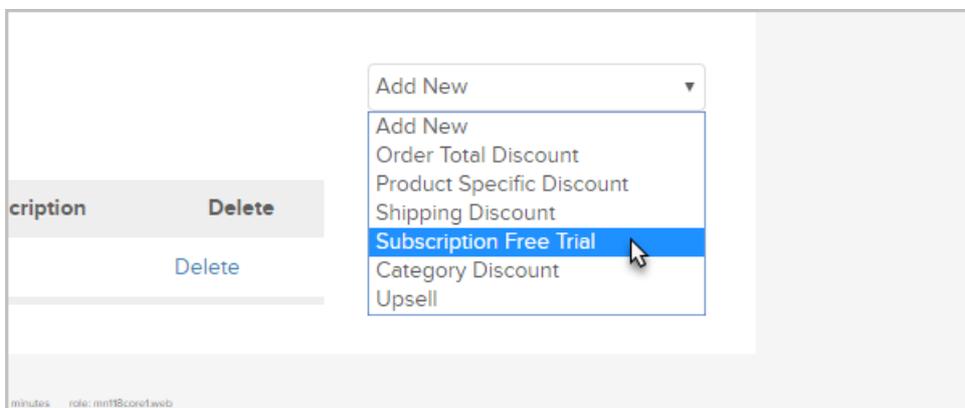
3. Enter the following details...
   - **Name**: The name only shows up for your users. It should be short but descriptive (e.g. 30 Day Free

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.
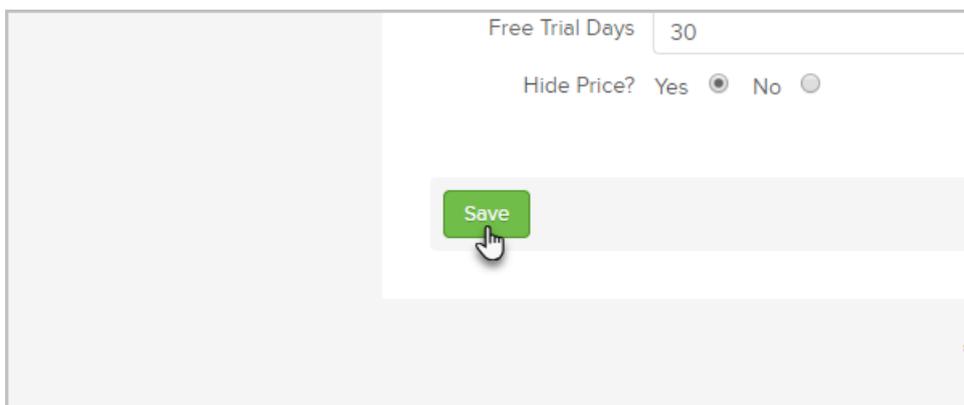

4. Click **Save**

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
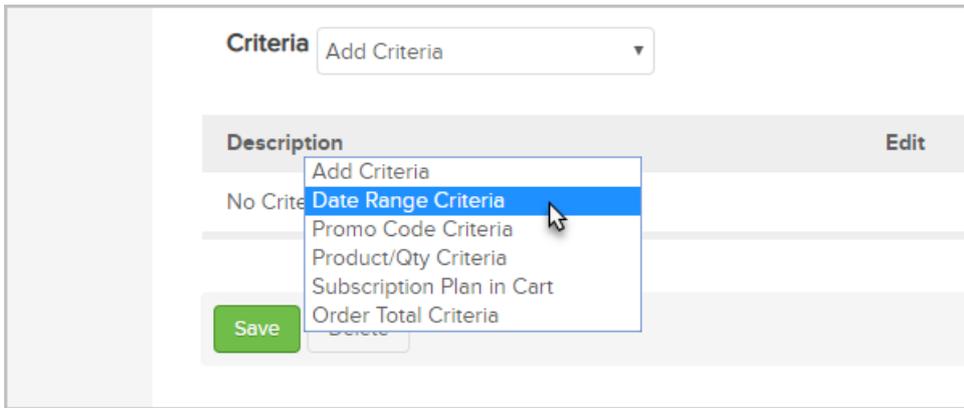
7. Enter the specific criteria parameters (i.e. start/end date, code, etc.)
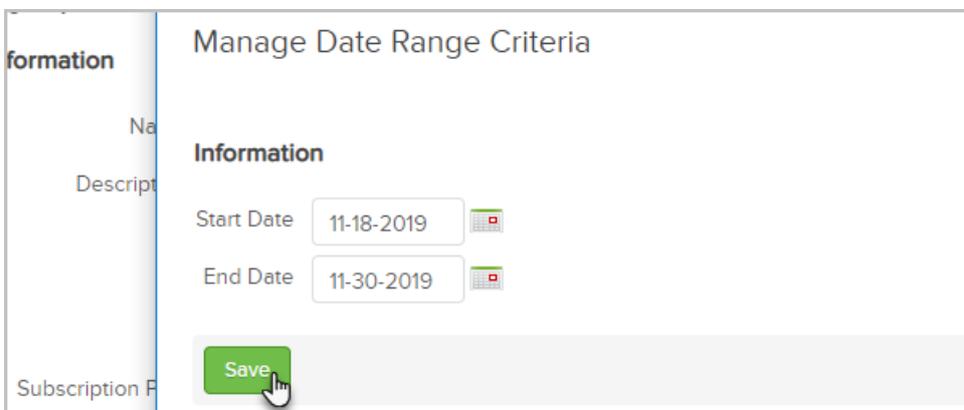
8. **Save** the criteria and **Save** the discount.

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

Order Items

Name	Cost/Unit	Price/Unit	Type	Total Cost	Total Price	Margin	Fulfillment	Modify Fulfillment	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			

[Calculate Tax] [Add Order Item]

Payments

[Add Payment] [Refund Payment]

Date	Type	Status	Amount	Note
11/7/2019	Credit Card	APPROVED (Visa xxxxxxxxxxxx1111)	$0.00	Auto Charge For Invoice Ids:17914
Payment Total			$0.00	
BALANCE			**$0.00**	

Commissions

[Recalculate] [Create Commission]

Referral Partner	Commission	Item	Sold	Earned
Chrisj	Level 1 Standard Commission Program - Default	Subscription -- Trial - $10.00 -	$0.00	$0.00
TOTAL COMMISSIONS			$0.00	$0.00

Payment Plan

[Edit Payment Plan]

Auto Charge: Yes [View Payment Attempt History]

☐ Email the Invoice to the customer upon successful payment

Pmt #	Status	AmtDue	Paid	Date
Pmt 1	Paid	$0.00	$0.00	11/7/2019

[Save] [Save & Search] [Delete] [Preview Invoice] [Send Invoice] [Chargeback Dispute] [Clone]

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