# Creating and managing Access Passes

This guide outlines configuring Access Passes, assigning products, and establishing price levels for e-commerce on your platform. These components work together to control access to site content and manage financial transactions through Stripe.

Connect your stripe account | Set up your price levels | Create access passes | Create and attach a product to an access pass | Granting users the access pass | Attach the access pass to content around the site

📦 **Prerequisites**
- A Stripe account with a publishable key and a secret key.
- Administrative access to the Site Admin.
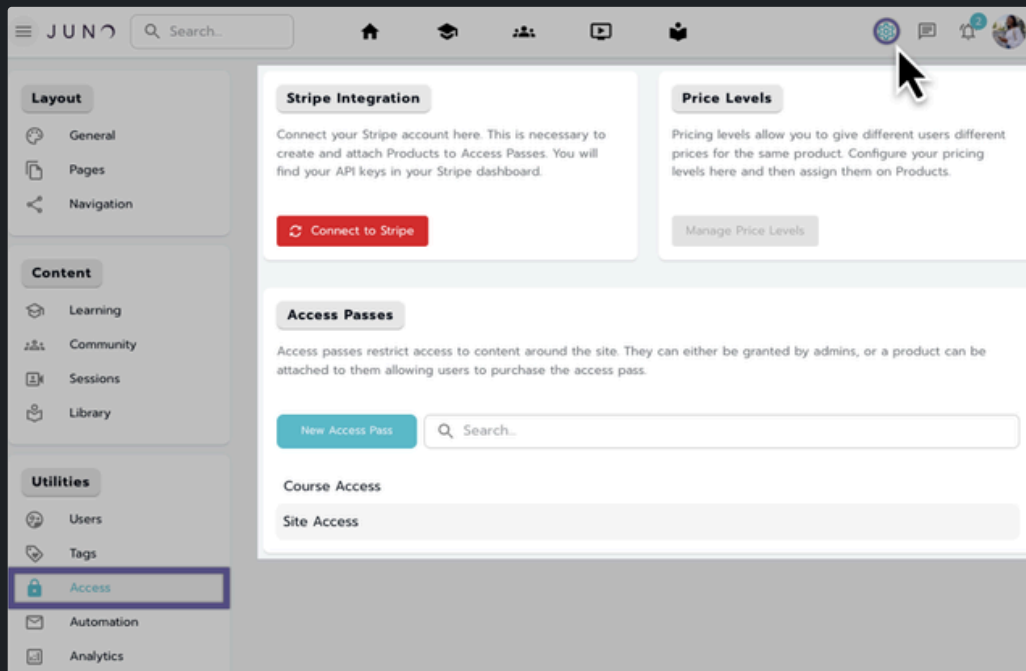
Accessing the Access section in the Site Admin.

Connect your stripe account

1. Log into the administrative portal.
2. Navigate to the Acess Passes section.
3. Select the red **Connect to Stripe** button
4. Enter your Stripe **Publishable key** and **Secret key** to connect your account.
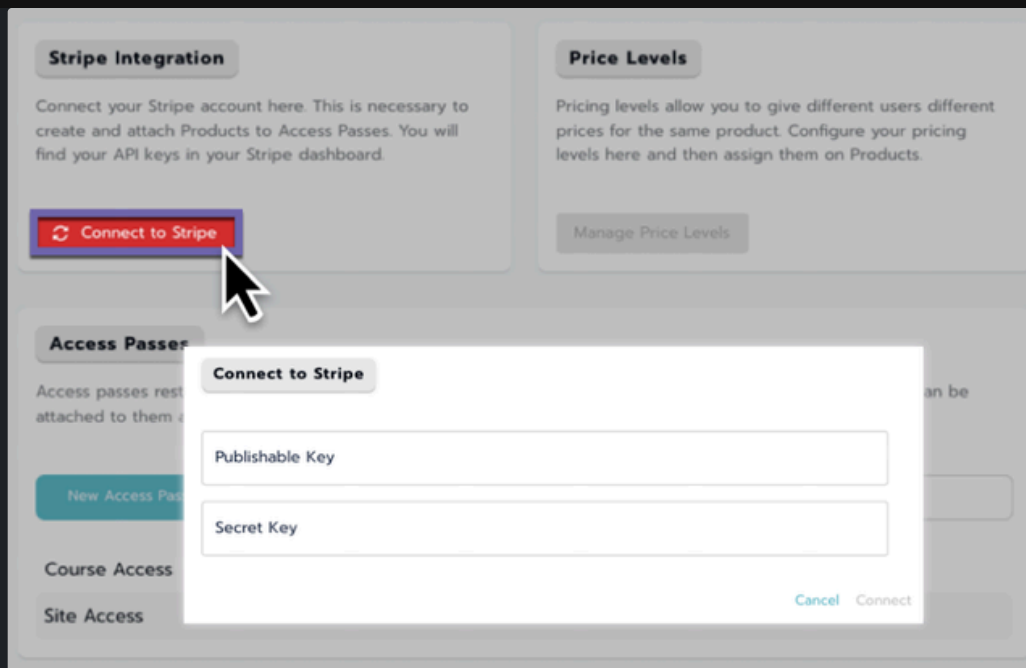
Stripe connection interface on the Site Admin.

Set up your price levels

> ⌄ Example use cases for price levels
>
> ℹ️ Example use cases for price levels
>
> **Sell Tickets to an event**
>
> Scenario: You are holding a live event but want to offer your customers the option to purchase access to it virtually.
>
> **Price Level Implementation**
>
> - Set the base price for an individual ticket.
>
> **Membership Tiers**
>
> **Scenario:** You can offer a membership to your site with multiple tiers, such as Bronze, Silver, and Gold. Each tier provides increasing levels of access and benefits.
>
> **Price level implementation**
>
> - Set a **Bronze price level** for basic site access.
> - Create a **Silver price level** with basic access plus additional features or content.
> - Establish a **Gold price level** for full access to all site content and exclusive benefits.
>
> **Early Bird Pricing**
>
> **Scenario:** You want to incentivize early registrations for an upcoming event or course by offering a discounted rate.
>
> **Price level implementation**
>
> - Create an **Early Bird price level** with a reduced rate available for a limited time.
> - After the promotion ends, set the **Standard price level** for regular registration.

Student Discounts

Scenario: Students are an important part of your audience, and you want to offer them a special rate for accessing educational content.

Price level implementation

- Establish a **General Access price level** for the public.
- Create a **Student price level** with a requirement for a valid student ID, offering a discount on the general rate.

Add-ons and Extras

Scenario: Your site offers a base product with optional add-ons or extras that customers can purchase for an enhanced experience.

Price level implementation

- Define a **Base Access price level** for the standard offering.
- Create separate price levels for each additional feature or extra that can be added to the base purchase.
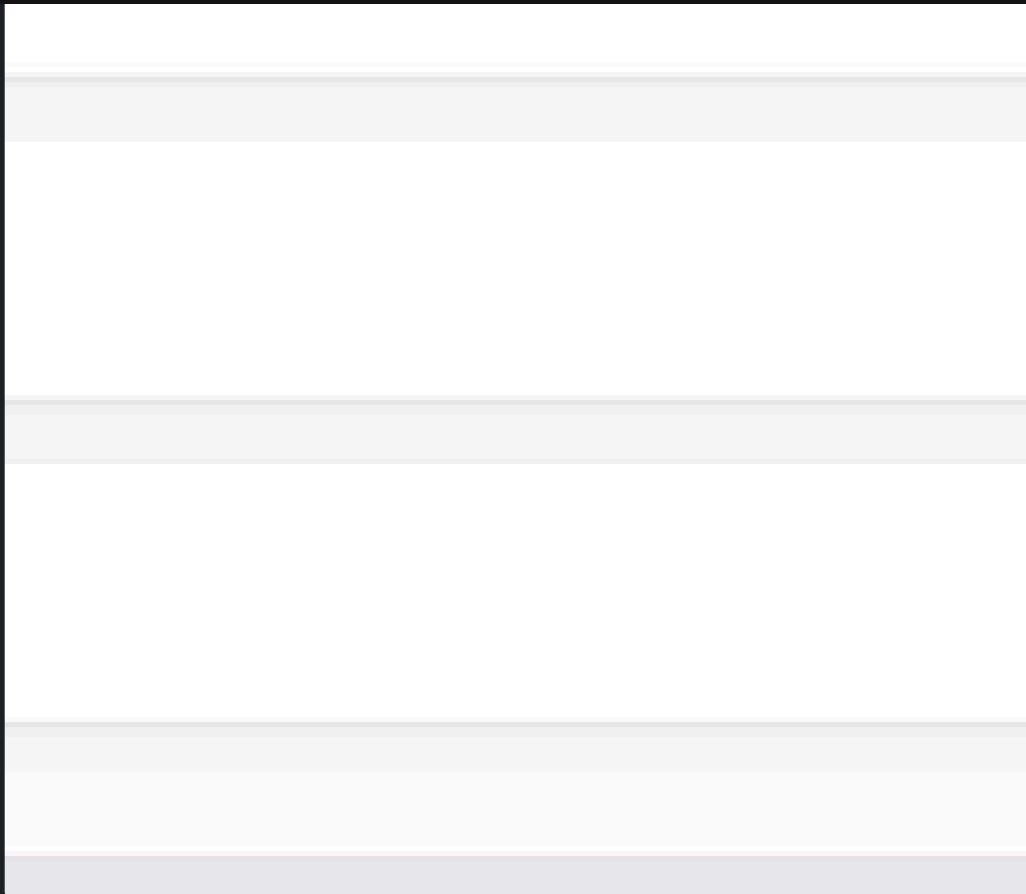
Adding a pricing level
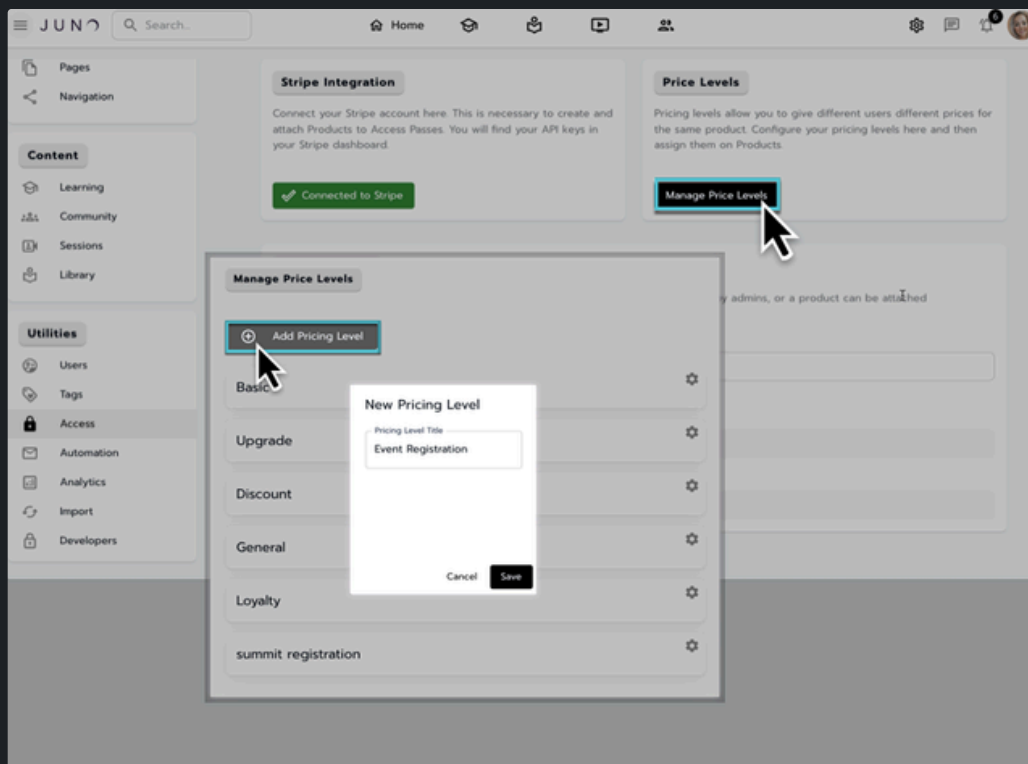
Creating a new Price Level.

1. Locate and select **Manage Price Levels**
2. In the **Manage Price Levels** window, select **+ Add Pricing Level**.
3. Enter a name for your price level in the **Pricing Level Title** field.
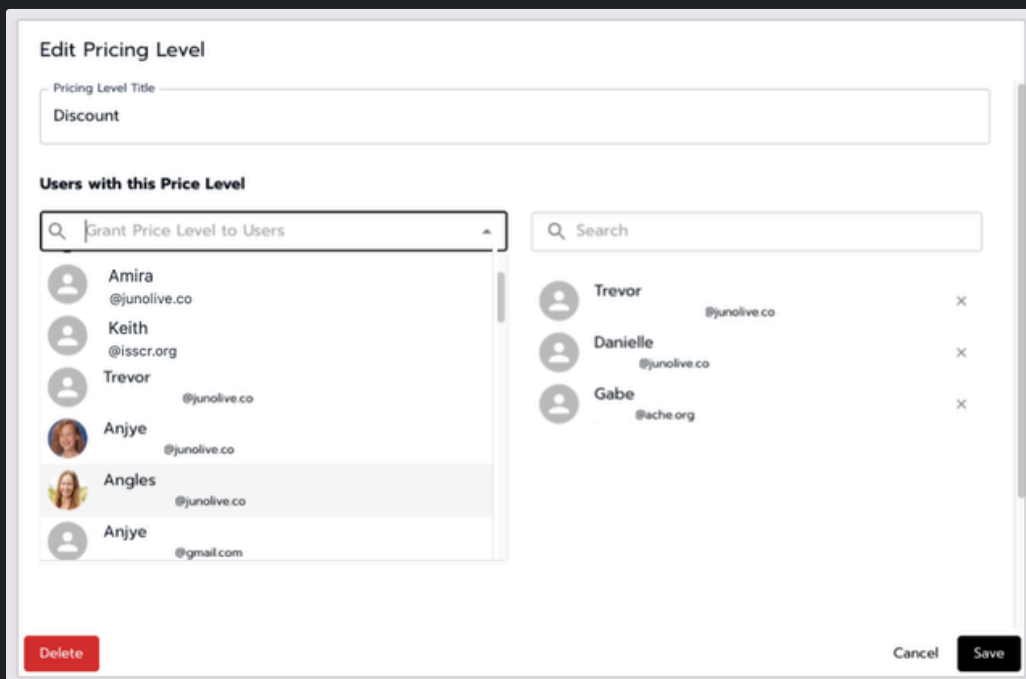4. Confirm the creation of the new price level by selecting **Save**.
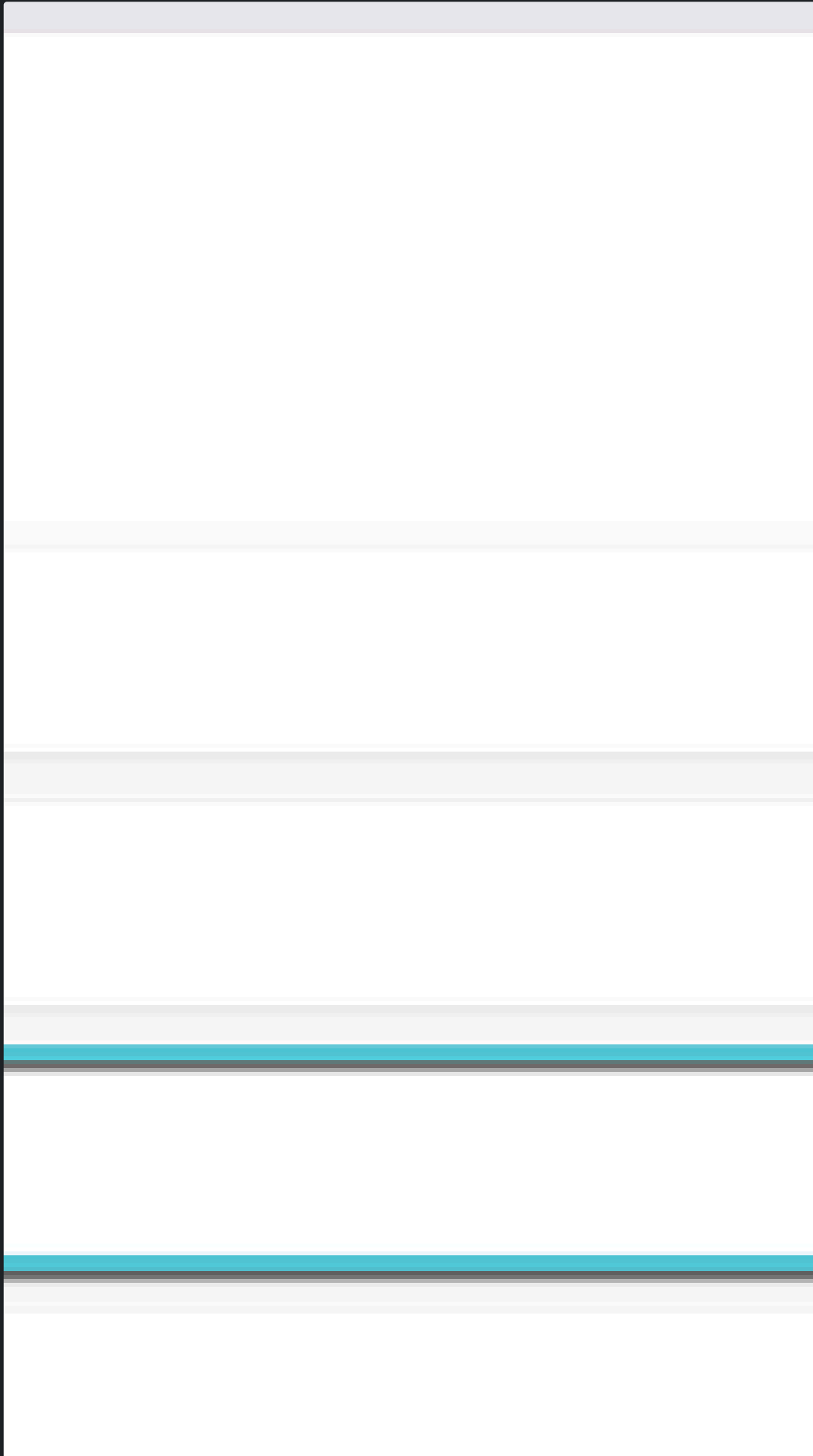
Selecting a Price Level to manage.

- In the updated list of price levels, identify and select the price level's **gear** icon you want to manage to configure its settings.
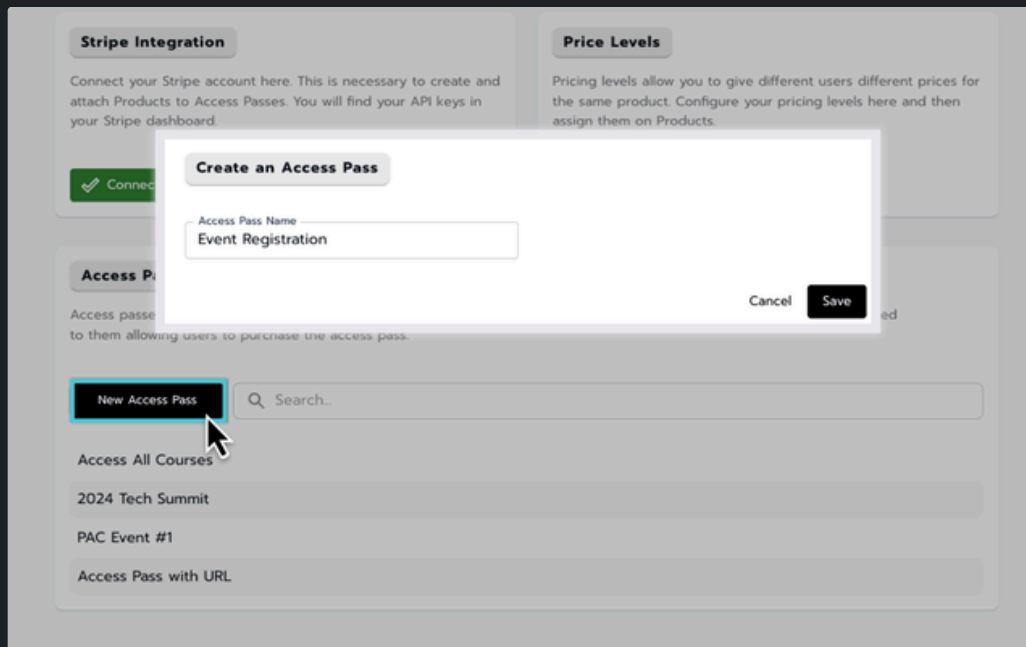
Assign users to a price level

Assigning users to a Price Level.

- Use the search bar on the left to search or scroll through to find and add users to your price level.

- Add users by selecting them from the dropdown.
- Select the **X** icon next to the user name on the right-hand side to remove users from the price level.

Create access passes

Creating an Access Pass.

Access passes restrict access to content around the site. They can either be granted by admins, or a product can be attached to them, allowing users to purchase the access pass.

1. To create a new access pass, select **New Access Pass**.
2. Give your access pass a **Name** and save it.
3. Once created, select the newly created access pass from the list to manage it.

Choosing an Upgrade path on an Access Pass.

4. Choose the method of access pass activation via the radio buttons listed (default: None):
   - **External URL**: Use this if the pass is granted after completing a requirement outside your platform. Follow up to ensure the requirement is met before assigning the pass.
   - **Product**: Use this if the pass is granted after purchasing a product through Stripe on your platform.

Configuring an upgrade path

1. Choose the radio button labeled **Upgrade URL**.
2. **Access the URL field**

   After selecting, the **Upgrade URL** field will be available for input.
3. **Input URL**

   Enter the URL that will redirect users to an external page for further instructions or a third-party payment processor like PayPal.

Create and attach a product to an access pass

1. Select the radio button for **Product** to begin.
2. **Choose or create a product**
   - **Existing Product:**

     If your product is already available, select it from the dropdown to link it with the Access Pass.
   - **New Product:**

     To create a new product, select **Create New Product**.
3. **Create product window**

   When creating a new product, a window will appear.
4. **Enter product details**

   Provide a name and description for the new product.

5. **Save or cancel**
   - **Cancel:**
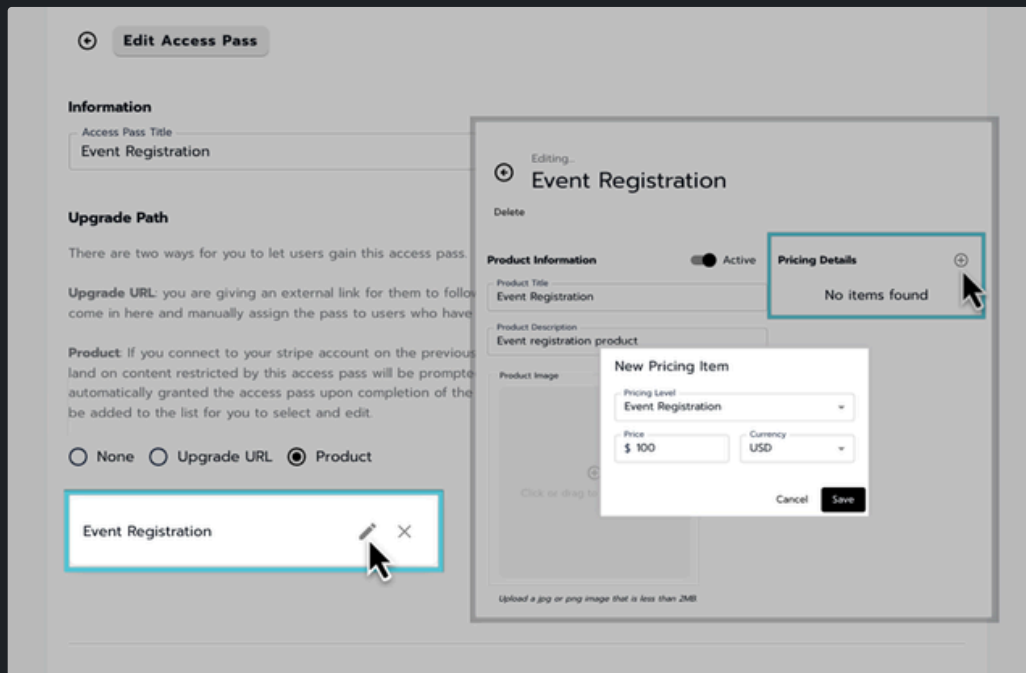   Clears the field and closes the window.
   - **Save:**
   Adds the new product to the product list dropdown.
6. **Attach to access pass**
   After saving the new product, select it from the dropdown to link it with your Access Pass.

Adding price levels to products

Adding Price Levels to a Product.

1. **Edit the product**
   Once you've linked a product to your Access Pass, you must update its pricing levels. To do this, select the **pencil** icon to edit the product.
2. **Access the product window**
   The product editing window will appear.
3. **Add price levels**
   In the **Pricing Details** section, select the **+** icon to add a new price level. You can add as many price levels as necessary for your product.

> ⚠️ **Assign Appropriate Price Levels:**
> Depending on who should access the content, ensure the correct price levels are assigned here.
>
> - If someone attempts to access the content and isn't listed on any configured price levels, they will receive an error indicating the content is not fully set up and available.
> - To avoid access issues, ensure that all users are listed on an appropriate price level and that each price level is applied to the product.

4. **Configure price level**
   - Use the Pricing Level dropdown in the New Pricing Item window to choose the level you want to add.
   - Enter the desired price for this level in the **Price** section and choose the type of **Currency** (USD or CAD).

5. **Save changes**

   Select **Save** to add the new price level to your product.

Granting users the access pass

> 📱 **Understanding Access Pass Privileges**
>
> Adding users directly to the Access Pass provides full access to the linked product or URL, bypassing the need to purchase or navigate separately.
>
> You can also update a user's Access Pass privileges after they have followed your specified steps, such as navigating to a third-party URL and completing the required actions. Once verified, return to this page and update the user's access accordingly.
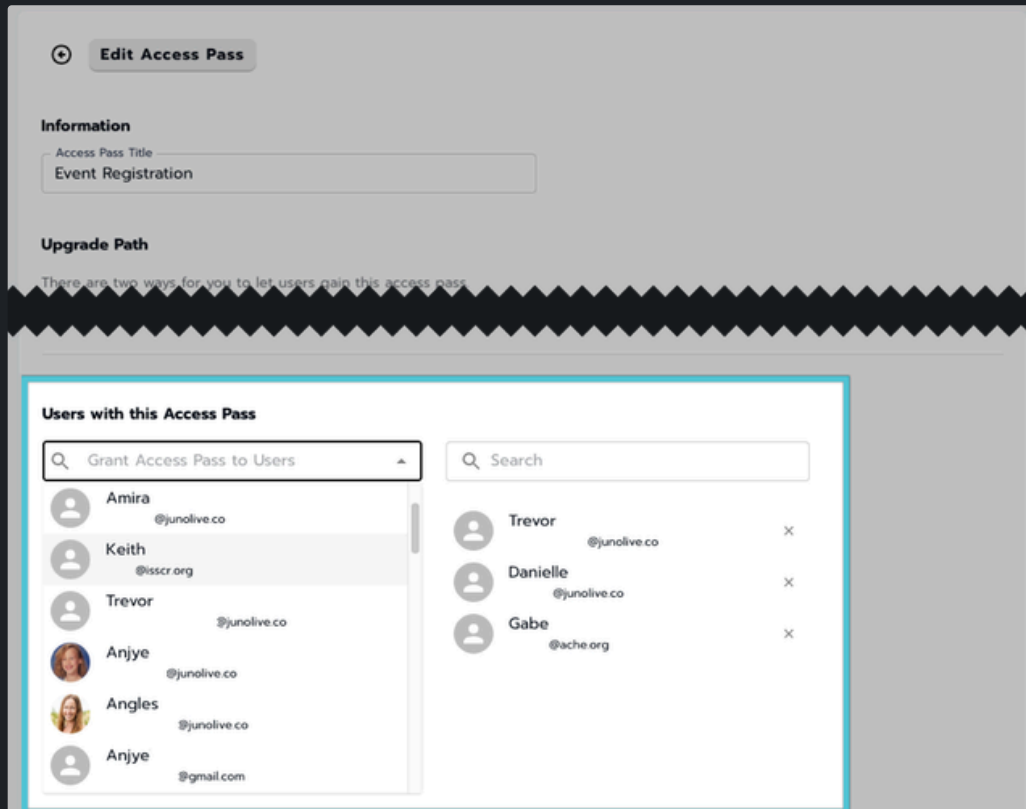
Granting users the Access Pass.

1. **Grant Access Pass**

   Use the **Grant Access Pass to Users** dropdown to find and select the users you wish to include.

2. **Remove Users**

   To remove users from the Access Pass, use the **X** icon next to their email address.

Once you have created and configured your access pass accordingly, you can attach it to content around the site.

📄 Attaching access passes to content around the site.

📄 Creating and managing Access Passes

📄 Getting started with the site admin

📄 Using the utilities section of the site