

The Settings Page: A How-To Guide

The **Settings** page is your account control center. From here you can see your current plan and status, change or switch plans, manage billing and storage, pause your membership, turn on optional extra pages, set your email preferences, and export or wind down your account.

This guide walks through every function on the page.

Settings

[Student log-in](#)

Email

demo@chalkandchart.test

Role

Parent

Plan

Scholar

Status

Active

Email and password changes will be available once secure sign-in is enabled.

Storage

1.1 MB of 10.00 GB used (0%) on the Scholar plan.

Choose a plan below to add extra storage.

Plan & billing

You are on the **Scholar** plan. No active subscription yet.

Monthly

Annual

Lifetime

Primer

\$4.99/mo

Up to 4 students · 2 GB storage

Choose plan

Scholar

\$9.99/mo

Unlimited students · 10 GB storage

Choose plan

Secure payment is handled by Stripe. You can change or cancel anytime from Manage billing.

Optional pages

Add these pages to your left-hand menu.

- ☒ Standardized Testing Log
- ☒ Reminders
- ☒ Manage My Co-op
- ☒ Volunteer time
- ☒ High School Transcript
- ☐ High School Planner

Save pages

Email preferences

- ☐ Send me product news and blog updates

We use double opt-in and honor one-click unsubscribe. Account and billing emails are always sent regardless of this setting.

Save preferences

Data & account

Download a copy of everything in your account as a single file. Cancellation and reactivation are handled from Manage billing above; when an account is cancelled its data is archived for 180 days before permanent deletion, with a notice 30 days ahead.

Download my data

Opening the Settings page

From the main menu on the left, click **Settings** (the gear icon). On a phone, **Settings** is not in the bottom bar, so tap **More** (the menu button at the bottom-right), then tap **Settings** in the menu that slides up.

The page is a single scrolling column of cards, in this order: **Account**, **Storage**, **Plan & billing**, **Optional pages**, **Email preferences**, and **Data & account**.

Note: This guide uses a sample account, "Demo Family," on the **Scholar** plan, so every card and option is visible. The **Optional pages** card appears on every plan, but on the Primer plan it offers only the **Standardized Testing Log** toggle; the other optional pages (Reminders, Manage My Co-op, Volunteer time, High School Transcript) are Scholar features and appear when you have Scholar access, including during the free trial.

Account

The **Account** card shows your profile at a glance.

Settings

Email	Role	Plan
demo@chalkandchart.test	Parent	Scholar
Status		
Active		

Email and password changes will be available once secure sign-in is enabled.

Field	What it shows
Email	The email address you sign in with.
Role	Your role on the account (for example, "owner").
Plan	The plan level you are on (Primer or Scholar). During a free trial it notes "(trial)" since you have full Scholar access.
Payment	How you pay: Monthly , Yearly , Lifetime · one-time , or "Free trial — no charge yet" while you are still in the trial.
Renews / Trial ends	The date your subscription next renews, or the date your free trial ends. A Lifetime membership has no renewal, so this row is not shown.
Status	Your access status, shown as a colored pill.

The **Status** pill can read:

- **Active** (green): your subscription is paid and current.
- **Free trial** (green): you are inside your free trial with full Scholar access.
- **Trial ended** (amber): your trial has finished and you have not yet chosen a plan.
- **Payment due** (amber): a payment did not go through and needs attention.
- **Paused** (amber): your membership is paused until a date you chose.
- **Cancelled** (red): your subscription has ended.

Note: Email and password changes are not available on this card yet. A note under the card explains that they will be added once secure sign-in is enabled.

Storage

The **Storage** card shows how much of your plan's storage you have used, mostly from Gallery photos.

Storage

1.1 MB of 10.00 GB used (0%) on the Scholar plan.

Choose a plan below to add extra storage.

- A progress bar and a line below it read, for example, "1.2 GB of 10 GB used (12%) on the Scholar plan."
- If you are running low, a message tells you how much space is left and suggests moving to a larger plan.
- If storage is full, a message asks you to delete some photos to free up space, or move to a larger plan.

Add extra storage (a paid add-on)

If you have an active subscription, you can buy extra storage in 2 GB units. Each unit costs \$1 per month (or \$10 per year) and is billed on the same schedule as your plan.

1. Find the **Extra storage** line, which shows how much add-on space you currently have.
2. Click **Add 2 GB** to add one unit. Repeat to add more.
3. To reduce it, click **Remove 2 GB** (this button appears only once you have at least one unit).

Changes apply immediately. The cost is prorated for the rest of your current billing period, as the note under the buttons explains.

Note: If you do not have an active subscription yet, this card instead reads "Choose a plan below to add extra storage." Pick a plan first, then come back to add storage.

Note: On a Lifetime account, this card reads "Your Lifetime membership includes this storage. Extra storage add-ons are not available on Lifetime."

Plan & billing

The **Plan & billing** card is where you choose a plan, switch plans, open the billing portal, and pause your membership.

Plan & billing

You are on the **Scholar** plan. No active subscription yet.

Monthly Annual Lifetime

Primer \$4.99/mo

Up to 4 students · 2 GB storage

Choose plan

Scholar \$9.99/mo

Unlimited students · 10 GB storage

Choose plan

Secure payment is handled by Stripe. You can change or cancel anytime from Manage billing.

At the top, a summary line tells you where you stand:

- On a free trial: "You are on a free trial with full **Scholar** access until [date]. Choose a plan below to continue after it ends."
- Subscribed: "You are on the **[plan]** plan ([monthly or annual], renews [date])."
- Lifetime: "You have a Lifetime **[tier]** membership: permanent access with no recurring billing."
- Paused: "Your membership is paused until [date]." with a **Resume now** link.
- No subscription yet: "You are on the [plan] plan. No active subscription yet."

Choose monthly, annual, or lifetime pricing

Use the **Monthly / Annual / Lifetime** toggle to switch the prices shown on the plan cards below it. Annual pricing reflects the homeschool school-year discount (you pay for roughly eight months to get twelve months of access). Lifetime is a one-time purchase that gives you permanent access with no recurring billing, shown with a "Pays for itself within N years" note.

The plans

Two plan cards are shown side by side. Each shows the price at the interval you selected, plus what the plan includes.

Plan	Monthly	Annual	Lifetime	Students	Included storage
Primer	\$4.99/mo	\$49.99/yr	\$149.99 once	Up to 4 students	2 GB
Scholar	\$9.99/mo	\$99.99/yr	\$249.99 once	Unlimited students	10 GB

Your current plan card is outlined and its button reads **Current plan** (and is not clickable). On the other plan, the button reads:

- **Choose plan** if you do not yet have an active subscription, or
- **Switch to this plan** if you already subscribe and want to change plans.

When **Lifetime** is selected, each plan's button instead reads **Buy Lifetime**.

Note: If you already have a Lifetime membership, the interval toggle and plan cards are hidden. In their place a summary line reads "You have a Lifetime **[tier]** membership: permanent access with no recurring billing.", and the **Account** card shows a "· Lifetime" suffix next to the plan name.

Start checkout

1. Set the **Monthly / Annual / Lifetime** toggle as you want it.
2. On the plan you want, click **Choose plan** (or **Switch to this plan**, or **Buy Lifetime** when Lifetime is selected).
3. A **Subscribe** window opens right inside the page with a secure Stripe payment form (titled **Buy Lifetime** for a Lifetime purchase). Enter your card details there.
4. When payment is done, click **Done** to close the window. Your plan updates within a few moments.

To cancel out without paying, click **Close** in the top-right of the window. No changes are made.

Plan & billing

You are on the **Scholar** plan. No active subscription yet.

Monthly

Annual

Lifetime

Primer

\$49.99/yr

Up to 4 students · 2 GB storage

Save 17% vs monthly

Choose plan

Scholar

\$99.99/yr

Unlimited students · 10 GB storage

Save 17% vs monthly

Choose plan

Secure payment is handled by Stripe. You can change or cancel anytime from Manage billing.

Note: Payment is handled securely by Stripe. The note under the plans reminds you that you can change or cancel any time from **Manage billing**.

Manage billing (the Stripe billing portal)

If your account already has billing set up, a **Manage billing** button sits in the top-right of the card. Click it to open Stripe's secure billing portal in a new tab, where you can:

- Update your card or payment method.
- Download invoices and receipts.
- Change or cancel your subscription.
- Reactivate a cancelled account.

Pause your membership

If you have an active subscription and it is not already paused, you can pause both billing and access until a date you choose (up to one year out).

Pause billing and access until a date you choose (up to a year). A membership can be paused **once per calendar year**. Pause before your billing date, or the pause begins after your next billing date. It resumes automatically, or you can resume early from here.

Resume on 

Cancel

Pause until this date

1. Click **Pause membership**.
2. In the form that appears, pick a **Resume on** date.
3. Click **Pause until this date**.

Your membership resumes automatically on that date, or you can end the pause early with the **Resume now** link on the summary line.

Important: A membership can be paused only **once per calendar year**. If you have already used your pause this year, the button is replaced with a note saying so, and you cannot pause again until next year.

Important: Pause **before** your billing date. If you pause after your next billing date has passed, the pause begins only after that next billing date (you are billed once more first).

Optional pages

The **Optional pages** card lets you add extra pages to your left-hand menu, turning each on only if you want it. It appears on every plan. On the Primer plan it offers the **Standardized Testing Log**

toggle; the remaining pages are Scholar features and appear when you have Scholar access, including during the free trial.

Optional pages

Add these pages to your left-hand menu.

☒ Standardized Testing Log

☒ Reminders

☒ Manage My Co-op

☒ Volunteer time

☒ High School Transcript

☐ High School Planner

Save pages

1. Tick any of the optional pages you want to use.
2. Click **Save pages**.

The **Save pages** button stays disabled until you actually change one of the toggles. Once saved, each page appears in your menu right away. Untick a box and save again to remove a page from the menu.

Toggle	What it adds	Plans
Standardized Testing Log	A Standardized Testing Log page for recording test results (sits just below Grades).	Every plan
Reminders	A Reminders page for opt-in email reminders with selectable lead times (sits just below Portfolio).	Scholar
Manage My Co-op	A Manage My Co-op page for tracking co-op classes, student rosters, and attendance.	Scholar
Volunteer time	A Volunteer Time page: a printable service-hours log for each student.	Scholar
High School Transcript	A High School Transcript page that builds a printable transcript from your grades (sits just after Portfolio).	Scholar

Tip: Each optional page has its own how-to guide right here in Help & Guides. Turn a page on, then open its guide to learn what it does.

Email preferences

The **Email preferences** card controls whether we send you marketing email.

Email preferences

☐ Send me product news and blog updates

We use double opt-in and honor one-click unsubscribe. Account and billing emails are always sent regardless of this setting.

Save preferences

1. Tick or untick **Send me product news and blog updates**.
2. Click **Save preferences**.

A confirmation message appears: "Subscribed. You will receive product and blog updates." when you opt in, or "Unsubscribed from marketing email." when you opt out. The **Save preferences** button is disabled until you change the toggle.

Note: We use double opt-in and honor one-click unsubscribe. Account and billing emails (such as receipts and password resets) are always sent, regardless of this setting.

Data & account

The **Data & account** card lets you download everything in your account, and explains how cancellation and data retention work.

Data & account

Download a copy of everything in your account as a single file. Cancellation and reactivation are handled from **Manage billing** above; when an account is cancelled its data is archived for 180 days before permanent deletion, with a notice 30 days ahead.

Download my data

Download my data

Click **Download my data** to export your whole account as a single JSON file named `chalk-and-chart-export.json`. The button briefly reads "Preparing..." and then the file downloads through your browser. A confirmation "Your data export has downloaded." appears when it is done.

Cancellation and data retention

Cancelling and reactivating are handled from **Manage billing** in the Plan & billing card above (not from this card). The note here explains the retention schedule after a cancellation:

- Your data is archived for **180 days** before it is permanently deleted.
- We send a notice **30 days** ahead of deletion.

If your account is archived, a colored banner appears at the top of this card telling you the exact date your data will be deleted, and reminding you to download it (or reactivate from **Manage billing**) before then. The banner turns red inside the final 30-day window.

Quick reference

I want to...	Do this
See my plan and status	Account card → Plan and Status
Check how much storage I have used	Storage card → progress bar
Buy more storage	Storage card → Add 2 GB (needs an active plan)
Remove extra storage	Storage card → Remove 2 GB
Switch monthly, annual, or lifetime	Plan & billing → Monthly / Annual / Lifetime toggle
Buy a Lifetime membership	Plan & billing → set toggle to Lifetime → Buy Lifetime
Start a plan	Plan & billing → Choose plan → finish in the Subscribe window
Change plans	Plan & billing → Switch to this plan
Update card, get invoices, or cancel	Plan & billing → Manage billing
Pause my membership	Plan & billing → Pause membership → pick a date → Pause until this date
Resume a paused membership	Plan & billing → Resume now
Add the Standardized Testing Log page (every plan)	Optional pages → tick Standardized Testing Log → Save pages
Add Reminders, Co-op, Volunteer, or Transcript pages (Scholar access)	Optional pages → tick a box → Save pages
Turn marketing email on or off	Email preferences → tick / untick → Save preferences
Export all my data	Data & account → Download my data

Screenshots use a sample "Demo Family" account on the Scholar plan.