



## Membership SuperMod for Miva Merchant™

*Discounts, Sales and Membership Rewards  
(Price and Availability Group SuperMod)*

Product Manual



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# Table of Contents



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## Module Description

The Membership SuperMod allows you to create Membership Groups in Miva Merchant giving the store owner ways to reward customers through Customer Appreciation Discounts, Sales and Points that can be redeemed for a discount. The store owner can make various Membership Groups allowing the owner to offer different levels of Membership (and its benefits) depending on the “level of loyalty” of the customer. Customers can be automatically moved from one Membership Group to the next as their purchasing increases. The Membership SuperMod also provides facilities to create special time-based sales for all shoppers in the store.

### Key Benefits

- Store Morph MMUI and CSSUI Compliant: Utilizes standard features of Miva Merchant 5 for setting discounts and availability. Can be used with MMUI and CSSUI and provides full StoreMorph compatible templates for all displays and layouts.
- Full automatic control of all Price and Availability Group customer assignments. Membership Groups define a set of price and availability groups that are automatically applied to all members of the Membership Group.
- Membership Groups can have a set beginning date, expiration date or specific duration
- Configurable to display discounts as a price reduction in the basket and checkout screens so customer is aware of their savings
- Basket price adjustments are performed when a user logs in; thus allowing the customer to take advantage of their membership even if they log in after shopping.
- Membership and Sales Features:
  - Time-duration based sales: The store administrator can configure special “Automatic” membership groups that apply to every customer immediately upon login. This is useful for creating special sales periods where all shoppers receive a discount on any or all products in the store
  - Membership Rewards Program: Provide multiple levels of discounts to customers based on their purchase history. Memberships into discount (price) groups can occur by point accumulation, purchase accumulation, or points spent.
  - Points Redemption Program: Provide a points redemption program where customers accumulate points based on purchase history, then can receive discounts in the store by redeeming points for discounts.
  - Exclusive Membership Groups: The store owner can create membership groups that remove the customer from all other groups as they enter an exclusive group.
- Automatic entry into membership groups based on:
  - Purchase of a specific product
  - Prior Price or Availability Group membership
  - Entering Membership Code into the customer account
- Automatic removal from membership groups based on:
  - Allowed duration of a membership
  - Expiration date of a membership



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- Entry into an exclusive group
  - Manual expiration by administrator
  
  - Customer benefits:
    - Receive pre-established discounts at checkout when part of a Membership Group
    - Accumulate points when making purchases
    - Redeem accumulated points when making purchases
    - Receive pre-established discounts and earn/use points even if login to Membership Group during a shopping session
    - Pay with dollars (in addition to points) if there are not enough points accumulated to cover the cost of the entire order
  
  - Storeowner has complete control when creating Membership Groups
    - Optionally create a “Signup Fee” for the Membership Group
    - Limit the duration of a Membership Group (in days) – great for running sales!
    - Manually adjust the number of points in a customer record
    - Allow or disallow points to be used to pay for tax or shipping
    - Include Price and Availability Groups in the Membership Group
    - Track total purchases, discounts, points earned and points spent by customer
    - Add customers to a group and individually specify their end date within the Membership Group
    - Determine thresholds for automatic inclusion of a customer in a Membership Group



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## Theory of Operation

### General Theory

The SuperMod product line of modules for Miva Merchant are "super" because the products in this line give you control one layer above "normal" modules and Miva Merchant features. As a result you can control settings, functionality and the interaction of other modules or Merchant functions through the SuperMods. The SuperMods do not interfere with the functionality of other modules in your store - indeed they give you the ability to manipulate some of the functionality of those modules or built-in Merchant features.

Although, each SuperMod handles a different type of functionality - from the display of Miva Merchant when a customer enters the storefront to Membership features, all of the SuperMods were specifically designed to work together. Therefore, if you need complete control over how your customers move from one Membership Group to another and also need to control the shipping options available for the items that a member purchases, the two SuperMods that give you these rather different capabilities also work together so that you can cross over and properly calibrate the functionality you need. These sophisticated modules give you a level of control never seen before with Miva Merchant.

The Membership SuperMod (also known as the Price and Availability Group SuperMod) provides a robust automated control system for assigning customers to price and availability groups. This automated system permits one to create an extremely advanced price and product availability system for your Miva Merchant store. In order to fully understand and operate this product, one should be familiar with the use of Price and Availability Groups in Miva Merchant.

### Price Groups

A price group allows the store owner to apply special discount or markup pricing to a group of products, and apply the discount or markup to a set of customers. When a customer is in a price group, the discount or markup of this price group is **only** applied to the products that are also in the price group. Price groups do not affect the visibility (or ability of a customer to purchase) a product, but only the price that is displayed to that customer for that product.

**Note:** When a customer is a member of a price group, the discounted price of a product in the same price group is always displayed to a customer. While this does provide a discount to the customer, many times the customer is unaware of this discount. In order to provide the customer with a visible indication of the discount, many store owners utilize StoreMorph items to display strike-through and/or retail pricing near the discounted price. This module also provides the ability for the customer to see the full retail price as well as the discount in both the basket and invoice without the need for additional display-based modules.



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### **Availability Groups**

An availability group allows the store owner to restrict what items can be viewed (and purchased) by certain customers in the store. The customers, products and categories can be assigned to an availability group; the customers that are in the availability group are the only customers that can “see” the categories and products within the same availability group; therefore they are the only customers that can purchase these products.

### **StoreMorph Theory**

In order to provide maximum flexibility and customization capability, the display portions of this module are provided as native StoreMorph templates, including full History Recall, and a set of simple StoreMorph Items that should be placed in your page templates to enable the display features of this module.



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## **Module Theory**

The Membership SuperMod gives the storefront owner the ability to create and control Membership Groups. By providing the storefront owner with maximum flexibility in developing Membership Groups for his customers, the module gives the store owner a tangible way to reward customers for their loyalty and to provide discounts and sales to customers. This SuperMod allows the store owner to control and take advantage of Miva Merchant's built-in capabilities such as Availability Groups and Price Groups to easily create Membership Groups – even within a store that has been in existence for years.

### **Membership Points System**

The store owner can optionally assign a point value for every dollar spent in the store and allow the customers to redeem points at checkout for a discount. Points accumulate in the customer account as soon as the point system is enabled and the store administrator provides a “non-zero” Points Earned Per Dollar value. Point redemption is available to customers as soon as the store administrator assigns a “non-zero” Points Spent Per Dollar value and inserts the StoreMorph code necessary to provide point-redemption on the Order Payment Information screen of the Miva Merchant store. The store owner has complete control over what items can be purchased with points. Optionally the tax and shipping charges can be excluded from the points-redemption program in order to ensure that the store owner collects these necessary expenses from the customer during checkout. Further, the store owner can create a special Price Group in the store, assign particular products to this price group, and exclude this price group from the points redemption program. When Price Group Points Exclusion is configured, the customer will not be able to redeem points to purchase these products. Note: the customer does not need to be made a member of this special price group; exclusions happen as a result of the product being assigned to the price group and not the customer account.

### **Special Feature: Show Discounts in Basket**

The Membership SuperMod can be configured to display all price-group related discounts in the basket as a visible indication to the customer of the amount saved for each order. Standard Miva Merchant behavior is to simply show the discounted price in the basket and invoice; while this is desired behavior for some store owners, others would like to tell the customer about the discounts they are receiving. When this feature is enabled, the Membership SuperMod will recalculate the basket prices and show the applied discount as an attribute of the product in order to display the discounts received in both the basket as well as the invoice.



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### **Special Feature: Price and Availability Group Verification & Pre-Existing Conditions**

Each time a customer logs into the store, the Membership SuperMod will validate all memberships that the customer belongs to. All price group and availability group assignments for this customer are verified at this time in order to ensure proper pricing and availability.

Essentially all price and availability groups that are not specified by one of the customer's Membership Groups are revoked from the customer account, and all price and availability groups included in the customer's Membership Groups are granted to the customer account. However, certain "pre-existing" conditions may need to be preserved for certain customers that have been manually placed in various price and availability groups.

For instance, certain customers may have been placed in a special availability group to allow them access to Purchase Order Payment (by using the Copernicus Payment SuperMod). It would be undesirable for the Membership SuperMod to revoke this availability group from the customer account automatically. Thus, the store owner can configure Price Group and Availability Group Exclusions.

These Exclusions specify that **existing** customer assignments within these price or availability groups **will be retained** even if the customer is not a member of any Membership Group that grants access to the specified price and availability groups.

### **Special Feature: Single Fee for Multiple Memberships (Membership Prerequisites)**

For membership templates that do not have individual membership fees, you can assign a "membership prerequisite template". When this setting is configured, the customer must first be a member of the prerequisite template before being granted free entry into any of the free membership templates.

The purpose of this feature is to provide for sites that desire to charge a single (potentially recurring) membership fee before providing access to any of the available membership templates. In other words, the customer must be "current" in their "site wide membership" before being allowed to access free entry into the various free memberships that are available.

If the customer membership is current in the global prerequisite, then using a join-code for the other free memberships will allow that customer to join the template immediately. If the customer is not current on their global prerequisite membership, they will immediately be taken to checkout upon "joining" one of the other free templates. They will be required to pay for the prerequisite before entry is given into the free template. The free template they are joining will be inserted as an attribute to the purchase product in the basket, so once they have paid the requested membership will also be processed.

The prerequisite template must:

- Have an associated fee
- Have a product associated with the template so the customer can purchase entry via the product. This product should have the same cost as the template fee.



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The prerequisite template may:

- Have an expiration duration.

The prerequisite template should not:

- Have a hard end-date.

The product assigned as the "purchase product" for the prerequisite template must have:

- The same "cost" as the prerequisite template fee
- A text attribute as the first attribute of the product. This text attribute will be populated with the secondary membership code so the membership can be granted upon checkout.

### **Membership Group Templates**

A Membership Group defines a set of Availability Groups and Price Groups that apply to all customers within the Membership Group. A Membership Group is created with a Membership Template that specifies how a customer becomes a member of the group and what benefits they will receive after joining the Membership Group:

- The length a customer can participate in the Membership Group
- The start date at which the Membership Group becomes available
- A "hard" cut-off (end) date after which all memberships are revoked
- A "Membership Product" that can be purchased that provides entry into the group
- Whether or not the membership is "exclusive". If so, all other memberships are revoked from the customer once they enter this group
- If a group is "automatically" applied to **every** customer immediately upon login. This feature can be used to specify default availability and price groups or provide time-duration based sales to all customers.
- The Availability and Price groups that each customer (member) of the Membership Group will become a part of upon joining the group. These availability and price groups are revoked from the customer account when the membership expires.
- A "Membership Code" that can be used to join the group.
- A signup fee that will be charged when a customer joins the group via signup code. This signup fee is added as a basket charge in the current customer basket to be paid for upon checkout. Note that a signup product supercedes a signup fee- in other words, if both are specified, the membership product is added to the basket (at the standard membership product price) rather than the basket charge.
- Automatic Signup Criteria: If any of the criteria are satisfied, the customer is automatically joined into the group and receives all associated privileges (price and availability groups) **without** being charged the Signup Fee. Criteria include:
  - Minimum & Maximum purchase level
  - Minimum & Maximum accumulated points
  - Minimum & Maximum used points
  - Pre-existing assignment to specified availability groups
  - Pre-existing assignment to specified price groups



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### **Joining a Membership Group**

A customer becomes a member of a specific group and receives the benefits of this group (via Price and Availability Group assignments) in one of several ways:

1. Entering a “secret” membership code in a sign-up form: Optionally, the customer can be charged an entry fee to join this group. If a fee is specified, the customer will be required to checkout of the store prior to receiving the benefits of the group.
2. Purchasing a specific “entry” product as designated by the store owner: The designated product will be added to the customer’s basket at the price specified in the product record. Once the customer completes the purchase of the product, they are granted membership into the group.
3. Automatic Signup based on criteria specified in the Membership Template. If the conditions specified are met, the customer is placed in the Membership group automatically without being charged an entry fee.



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## Module Installation and Upgrading

### Domain Installation of Module

You must first install the module in your Miva Merchant domain. After that you will need to follow the steps for installing the module in the store for which you have purchased the license.

*Note: Always add modules one at a time, completing the full installation. If installing more than one, add a module to your store and enter the license key, then proceed to the following module.*

### Module Domain Installation

- Go into the Miva admin (*admin.mvc*)
- Open the Global Settings → **Modules** branch in the left menu
- Click on the **Add Module** link and the screen pictured below will appear
- Click the **Upload** button

**Add Module**

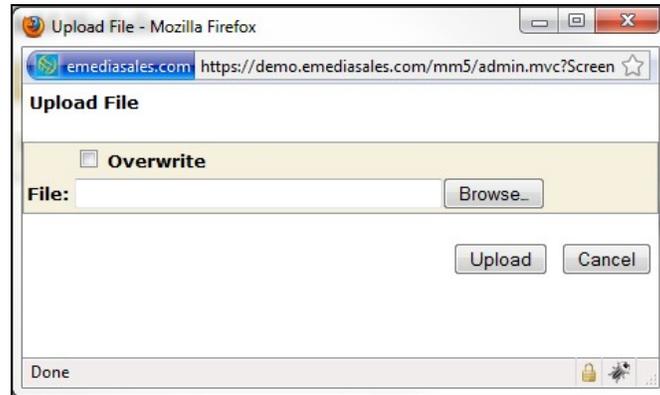
EXTRAS HELP

Files

Module:

Add Reset

- A Pop-Up window, like the one pictured below, appears and allows you to either **Browse** to find the module on your local drive or enter the filename of the module.
- Press the **Upload** button



7. Once you press the Upload button, the Upload File PopUp box disappears and the Add Module box is again visible. Press the **Add** button
5. Now the module has been installed in the domain. Next you need to install the module in the store.





## Store Installation of Module

- Go to the Miva admin (*admin.mvc*)
- Click on [System Extension Settings](#)
- Check the checkbox next to the module name.

**System Extension Settings** [EXTRAS] [HELP]

**Modules**

**AVAILABLE** **ASSIGNED** **ALL** [Check Miva Central for Related Modules, Add-ons, and Extras](#)

Assigned	Module
<input type="checkbox"/>	PayPal Express Checkout and/or Website Payments Pro
<input type="checkbox"/>	buySAFE 2.0
<input checked="" type="checkbox"/>	CBS - Membership SuperMod 5

[Update] [Reset]

**3. Click the checkbox next to the module name, then click Update**

- Press the **Update** button at the bottom of the screen.



- Click on the new tab CBS – Membership SuperMod 5.
- Read the *License Agreement*
- Check the box next to **I ACCEPT THE TERMS AND CONDITIONS OF THE LICENSE AGREEMENT**
- **Enter your License Key**
- Press the **Update** button. Now you have successfully installed the module in the storefront and you are ready to use it!

**System Extension Settings**

Modules: **CBS - Membership SuperMod 5**

**Membership SuperMod**  
Version: 5.5000 ([check for update](#))  
License Key: \_\_\_\_\_

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by eMediaSales

Docs: [Membership SuperMod docs](#)  
FAQ: [FAQs at MvtRocks!](#)  
Support: [my.emediasales.com](#)

Corporate End User License Agreement  
Version 1.0 February 21, 2008

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I certify that I have read and agree to the terms and conditions of the EULA.

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## Template Modifications and StoreMorph Installation

Upon installation, a new StoreMorph Item has been added to your store and the item has been automatically assigned to the ACED and OPAY pages for use. You should make the following changes to your StoreMorph pages and templates to enable the display of the provided templates. Additionally you may choose to customize the HTML provided in the module's templates, or even display these templates in alternate locations in your store.

1. Page ACED: Within the main page template OUTSIDE of the main form, add the following code below the `</form>` to display the membership join template within a customer's account:

```
<mvt:item name="cbs_membermanager" param="join" />
```

2. Page ACED ==> Customer Fields Tab: Below the “Customer Verify Password” HTML input field, add the following code to display the current status of a customer's memberships:

```
<mvt:item name="cbs_membermanager" param="stats" />
```

3. Page OPAY: Within the main page template OUTSIDE of the main form, add the following code below the `</form>` to display the Redeem Points form:

```
<mvt:item name="cbs_membermanager" param="redeem" />
```

## Module Updates

Copernicus publishes updates to its modules when there are significant feature enhancements. Once you have saved the update distribution to your local hard drive, unzip it and follow these instructions to add them to your storefront.

### Domain Module Upgrading

- Go to the Miva admin. (*admin.mvc*)
- Open the **Global Settings** branch and click on **Modules**
- Click the Edit button next to the **CBS – Membership SuperMod** module
- Click on the **Files** link in the content area of the screen

**4. Click on the Files link**





**Edit Module: CBS - Shipping SuperMod 5** EXTRAS HELP

Information **Files**

**Code:** cbs-supshipping5  
**Name:** CBS - Shipping SuperMod 5  
**Provider:** Copernicus by eMediaSales  
**Supported API Version:** 5.00  
**Version:** 5.5005  
**Usage Count (Number of Stores):** 1  
**Module Features:** component,data\_store,shipping,system,vis\_product,vis\_productbe,vis\_shipping  
 Active

Update Delete Reset

Click the **Upload** graphic button

**5. Click on the Upload button**

**Edit Module: CBS - Shipping SuperMod 5** EXTRAS HELP

Information **Files**

**Module:** modules/shipping/shippingsuper5.mvc UPLOAD

Update Delete Reset

- The Upload file PopUp box will appear. Check the **Overwrite** box so that the updated module will overwrite the old version.

Upload File - Mozilla Firefox

emediasales.com https://demo.emediasales.com/mmm5/admin.mvc?Scr

**Upload File**

**Overwrite**

file: Browse

Upload C

**6. Click the Browse button to find the file.**

**7. Press the Upload button**

**5a. Check the Overwrite checkbox**



- Enter the filename of the module on your local drive or use **Browse** to find the file.
- Press the **Upload** button this will take you back to the “Files” screen.
- Press the **Update** button and you are finished!

**9. Press the Update button**

**Edit Module: CBS - Shipping SuperMod 5**

Information **Files**

Module:



## Module Usage

### Module Configuration

Once you have installed the module, you'll want to configure it. The administrative interface for this module is located in the System Extensions section of the Miva admin:

1. Go to the Miva admin (admin.mvc)
2. Click on the arrow next to the name of the store in which you have installed this module.
3. Click on the System Extensions and in the content area of the Miva admin, you will see all of the tabs specific to the modules installed in this section. It will look similar to the picture below.
4. Click on the CBS – Membership SuperMod tab.

**System Extension Settings**

Modules: CBS - Membership SuperMod 5, **CBS Membership Manager Templates**, CBS Membership Manager Totals

**Membership SuperMod**  
Version: 5.5000 ([check for update](#))  
License Key: 7842cc950c297743bdba7c11ff696ee3  
Docs: [Membership SuperMod docs](#)  
FAQ: [FAQs at MvtRocks!](#)  
Support: [my.emediasales.com](#)

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Remove	Code	Name		
<input type="checkbox"/>	Level1	10% Off Level 1 Membership	<a href="#">EDIT HERE</a>	<a href="#">EDIT</a>
<input type="checkbox"/>	Level2	20% Off Level 2 Membership	<a href="#">EDIT HERE</a>	<a href="#">EDIT</a>
<input type="checkbox"/>	Level3	30% Off Level 3 Membership	<a href="#">EDIT HERE</a>	<a href="#">EDIT</a>

1-3 500

**Membership Points Configuration**  
 Enable Points System

### CBS – Membership SuperMod Tab (Global Configuration)

The Membership SuperMod is first configured in the CBS-Membership SuperMod tab in the System Extensions Configuration. It is in this tab that you initially configure the global settings, then create and configure the Membership Templates that are used to establish different levels of membership in your store.

Individual Membership templates are displayed at the TOP of this screen and global settings are configured beneath those. A description of the global configuration items follows:



<b>Membership Points Configuration</b>	
<input checked="" type="checkbox"/> Enable Points System	
<input type="checkbox"/> Pay Tax With Points	
<input type="checkbox"/> Pay Shipping With Points	
Points Earned Per Dollar:	<input type="text" value="1"/>
Points Spent Per Dollar:	<input type="text" value="100"/>
Price Group Points Exclusions:	<input type="text" value="Level1"/> <input type="text" value="Level2"/> <input type="text" value="Level3"/>
<small>*Note: This allows you to assign certain products to a special price group. Products that exist in this price group will not be permitted to be purchased with points. Thus, the storeowner can configure a special sale that requires true payments rather than points payments.</small>	
<b>Special Features</b>	
<input checked="" type="checkbox"/> Show Discounts in Basket	
Global Membership Prerequisite:	<input type="text"/>
Availability Group Exclusions:	<input type="text" value="Wholesale"/>
Price Group Exclusions:	<input type="text" value="Level1"/> <input type="text" value="Level2"/> <input type="text" value="Level3"/>
<small>*Note: Specify a global Free Membership Template Prerequisite to further restrict new membership signups into otherwise "free" groups to only those customers who are already a member of a specific Membership Template, or to charge a "one-time" signup fee for access to all free Membership Templates. The prerequisite Template should have a fee, and must use a product purchase for signup. This allows you to configure a site-wide membership fee for users who wish to sign up for any of the free memberships. **NOTE: This prerequisite does NOT apply to AutoJoin Memberships, only those Memberships that are acquired via product purchase or signup code. *Note: Upon each login, the membership system will verify what availability groups the customer belongs to based on the customer's current memberships. All other availability groups will be removed from the customer account. This exclusion list allows you to specify that certain availability groups should remain assigned to the customer even if the customer is not part of a membership template that includes this availability group. *Note: Upon each login, the membership system will verify what price groups the customer belongs to based on the customer's current memberships. All other price groups will be removed from the customer account. This exclusion list allows you to specify that certain price groups should remain assigned to the customer even if the customer is not part of a membership template that includes this price group.</small>	

## Membership Points Settings

- **Enable Points System:** Checking this box enables the accumulation of points in the customer account and redemption of points at checkout (if the Points Spent Per Dollar is configured with a non-zero number).
- **Pay Tax With Points:** When this box is checked, the customer may pay for tax using point redemption. When unchecked, the customer must provide a valid form of payment for tax charges.
- **Pay Shipping With Points:** When this box is checked, the customer may pay for shipping using point redemption. When unchecked, the customer must provide a valid form of payment for shipping charges.
- **Points Earned Per Dollar:** This setting determines the number of points accrued by customers as they shop in your store. For each dollar spent, this number of points will be assigned to the customer account. Setting this to zero stops points accrual. Points are only assigned for products purchased; all other basket charges (shipping, tax, point-redemption discounts, etc.) are removed from the dollar amount spent prior to assigning points
- **Points Spent Per Dollar:** This setting determines the point redemption value - how many points are used for each dollar discount provided. A higher number indicates a point is worth a lower dollar value during redemption. For example, 10 Points Spent Per Dollar effectively gives each point a value of \$0.10.
- **Price Group Points Exclusions:** Any price groups selected here will cause the points system to disallow paying for products assigned to this price groups with points. This allows the



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store owner to designate certain groups of products that must be paid for with a valid payment method other than points.

### Special Features Configuration:

- **Show Discounts in Basket:** When enabled, this setting causes the module to recalculate any price-group based discounts to be displayed as discounts in the basket. The line-item price is set to the retail price of the product and a discount amount is added as a line-item option to the product. This causes the retail price and discount to be shown both in the basket as well as in the customer invoice. **\*NOTE: This feature may conflict with other non-standard price discount systems that do not use Price groups for discounts (eg: bulk pricing, etc).**
- **Global Membership Prerequisite:** This feature is discussed in the theory section of the manual. It allows you to specify a “global” membership template that a customer must be a member of prior to gaining access into any of the “free” membership templates in your site.

This allows you to charge a “one-time” (and potentially recurring) fee for access to the otherwise free memberships you provide. Please see page 9 regarding the requirements of the prerequisite template and the purchase product for this template. To configure a prerequisite template, simply enter the template code here.

- **Availability Group Exclusions (Pre-existing Conditions):** The membership system verifies all customer availability groups immediately upon customer login. Effectively, all availability group assignments are revoked from the customer, and then only those specified by the customer’s memberships are re-assigned to this customer. This exclusion list indicates that certain availability groups should **not** be revoked from the customer during the availability group validation process. This allows customers to remain in certain availability groups that have been assigned manually prior to the membership system going into effect.
- **Price Group Exclusions (Pre-existing Conditions):** The membership system verifies all customer price groups immediately upon customer login. Effectively, all price group assignments are revoked from the customer, and then only those specified by the customer’s memberships are re-assigned to this customer. This exclusion list indicates that certain price groups should **not** be revoked from the customer during the price group validation process. This allows customers to remain in certain price groups that have been assigned manually prior to the membership system going into effect.

### Runtime Templates

These are StoreMorph Templates that are displayed when you call them using the `mvt:item` StoreMorph display code additions in your store as described in the installation section above. You may edit these templates directly to alter the look and feel of the display to match your store design.



## CBS – Membership SuperMod Tab (Membership Template Configuration)

**\*Note:** This tab will appear when you click “EDIT” next to a membership template in the main configuration tab of the module.

### Creating New Membership Templates

First, create a template by clicking on the New Membership Template Button. Set the Code and the Name of this Membership Group and click “Update.” You can add as many Membership Templates as needed.

Once you have added a Membership Template you will want to configure it. To do so, click on the “Edit Template” button. There are many variables to configure for each template and each is described below.

### Membership Template Specifications

The upper portion of the Edit Template screen contains configuration options of what privileges are provided to the Membership Group as well as how long or when those privileges are available.

### Membership SuperMod

Version: 5.5000 ([check for update](#))  
License Key: CBS-SUPMEMBER5-0512869715537620442

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Docs: [Membership SuperMod docs](#)  
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Support: [my.emediasales.com](#)

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**Template Code:**

**Template Name:**

Membership Length:  Days

Begin Date:  (MM)  (DD)  (YYYY)

End Date:  (MM)  (DD)  (YYYY)

Membership Product:

Exclusive

Automatically Enroll All Customers

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#### **Availability and Pricing Groups**

Availability Groups:

Pricing Groups:

- **Template Code:** This is the code associated with the template for internal tracking.
- **Template Name:** This is the name of the membership template.



- 
- **Membership Length:** This configures the maximum duration that a customer can be a member of this group. Upon entry into the group, the customer's membership is set to expire this number of days later. Upon expiration, the customer is removed from the price and availability groups provided by this membership. When set to zero, the membership does not expire.
  - **Begin Date:** This specifies the earliest date on which customers can join this membership group. Prior to this date, the membership code will not function.
  - **End Date:** Specifies a "hard-end" date after which all memberships in this group are revoked.
  - **Membership Product:** Specifies a product code that can be purchased to gain entry into the group. When a customer checks out of the store with this product in their basket, the customer automatically becomes a member of the group with all associated privileges of this group (ie: price and availability groups).
  - **Exclusive:** Indicates that upon entry into this group, a customer will have **all** other memberships revoked so that this is the only group they remain a member of.
  - **Automatically Enroll All Customers:** Creates a group that is automatically applied to all customers immediately upon login. This is useful for specifying either default price and/or availability groups for all logged-in customers; or, when used in conjunction with a Begin Date and End Date, specifies a date-specific sale for the store (ie: 20% off sale, etc).
  - **Availability Groups:** Specifies the availability groups that will be granted to customers as soon as they join this Membership Group.
  - **Price Groups:** Specifies the price groups that will be granted to customers as soon as they join this Membership Group.



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## Membership Template Signup Options

The lower portion of the Edit Template screen contains configuration parameters that describe how a customer becomes a member of the group.

<b><u>Membership Code Signup Options</u></b>	
Signup Code:	<input type="text"/>
Signup Fee:	<input type="text" value="0.00"/>
<b><u>Automatic Signup Options</u></b>	
Minimum Purchase Level:	<input type="text" value="10.00"/>
Maximum Purchase Level:	<input type="text" value="19.99"/>
Minimum Accumulated Points:	<input type="text" value="0"/>
Maximum Accumulated Points:	<input type="text" value="0"/>
Minimum Used Points:	<input type="text" value="0"/>
Maximum Used Points:	<input type="text" value="0"/>
Availability Groups:	<input type="text" value="Wholesale"/>
Pricing Groups:	<input type="text" value="Level1"/>

- **Manual Signup Options:** Customers can signup for a membership group by entering a membership code into their account screen.
  - **Signup Code:** Specifies the secret code used to gain access to this group
  - **Signup Fee:** Specifies the fee to be charged to customers that use the code to enter the membership group. The customer must then check out of the store prior to gaining access to the membership privileges. If the signup fee is zero, the customer is immediately entered into the group. \*Note: If you configure both a signup fee and a membership product (from above), the membership product takes precedence; and the fee collected will be based on the price of the product, not the fee set here.
- **Automatic Signup Options:** Customers can be given entry into various membership groups by way of meeting certain criteria. When a membership is granted due to any of these specific criteria, no membership fees are applied. This is useful for providing “progressions” from a lower membership level to a higher membership level with improved benefits. Note: Any customer that meets any of the following criteria will be automatically provided membership in this group.



- 
- 
- **Minimum/Maximum Purchase Level:** Specify a lower and upper bounds of a membership group based on the customer purchase history.
  - **Minimum/Maximum Accumulated Points:** Specify a lower and upper bounds of a membership group based on the customer accumulation of points.
  - **Minimum/Maximum Used Points:** Specify a lower and upper bounds of a membership group based on the total number of points spent by the customer.
  - **Availability Groups:** Any customers that are already assigned to a specific availability group will be given immediate access to this membership group (and all price and availability group privileges of this membership). This is useful for migrating “old” membership program members into the new program(s).
  - **Pricing Groups:** Any customers that are already assigned to a specific price group will be given immediate access to this membership group (and all price and availability group privileges of this membership). This is useful for migrating “old” membership program members into the new program(s).



## CBS-Membership SuperMod Totals Tab (System Extensions Section)

This tab allows the store owner at a glance to view the combined statistics of all Membership Groups in the store. This screen can only be viewed; you can not make edits to this screen. This screen is a snap shot of the store's Membership Statistics at the point in time when this screen is viewed.

**Membership SuperMod**

Version: 5.5000 ([check for update](#))

License Key: CBS-SUPMEMBER5-0512869715537620442

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by eMediaSales

Docs: [Membership SuperMod docs](#)

FAQ: [FAQs at MvtRocks!](#)

Support: [my.emediasales.com](#)

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**Statistics**

Total Purchases:	10.80
Total Discounts:	1.20
Total Points Earned:	11
Total Points Spent:	0

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- **Total Purchases:** This is a record (at the moment this tab is viewed) of the total dollar amount of purchases made by all members of all Membership Groups in the store.
- **Total Discounts:** This is a record (at the moment this tab is viewed) of the total dollar amount of discounts provided to all members of all Membership Groups in the store.
- **Total Points Earned:** This is a record (at the moment this tab is viewed) of the total points earned by all members of all Membership Groups in the store.
- **Total Points Spent:** This is a record (at the moment this tab is viewed) of the total points spent by all members of all Membership Groups in the store.



## CBS-Membership SuperMod Templates Tab (Customer Section)

For each customer record in your store you will find a CBS-Membership SuperMod Templates Tab. This tab contains a list of all of the Membership Templates created in the store. You can view which of those templates the customer is currently enrolled in. You can also add or remove the customer to/from each of the Membership Templates in the list. Finally you can set a membership “end date” for each Membership Template in which the customer is enrolled. There are also variables in this tab that are not editable but for information only. Below is a list of each of the variables in this tab.

**Edit Customer: james** EXTRAS HELP

Identification    Shipping/Billing Information    **CBS - Membership SuperMod 5 Member Templates**    CBS - Membership SuperMod 5 Member Totals

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**Membership SuperMod**  **Docs:** [Membership SuperMod docs](#)  
Version: 5.5000 ([check for update](#))    **FAQ:** [FAQs at MvtRocks!](#)  
License Key: CBS-SUPMEMBER5-0512869715537620442    **Support:** [my.emediasales.com](#)

Select	Code	Name	Status	Original Start	Start Date	End Date	
<input type="checkbox"/>	Level1 10% Off Level 1 Membership	Level 1 Membership	Expired	10/13/2010	10/13/2010	10/13/2010	<a href="#">EDIT HERE</a>
<input checked="" type="checkbox"/>	Level2 20% Off Level 2 Membership	Level 2 Membership	Current	10/13/2010	10/13/2010	11/12/2010	<a href="#">EDIT HERE</a>
<input type="checkbox"/>	Level3 30% Off Level 3 Membership	Level 3 Membership					<a href="#">EDIT HERE</a>

1-3    500    

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- **Select:** Check (or uncheck) this box to subscribe a customer to a membership group or to expire them from the group.
- **Code:** Identifies a particular membership template.
- **Status:** Indicates the current status of the customer’s membership. Will either be empty (customer has never entered this group), Current, or Expired.
- **Original Start:** Displays the date at which the customer first entered the membership group.
- **Start Date:** Indicates the most recent date when the customer subscribed to this group.
- **End Date:** Shows the date at which the customers membership will expire.



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## **CBS-Membership SuperMod Totals Tab (Customer Section)**

For each customer record in your store you will find a CBS-Membership SuperMod Totals Tab. This tab presents a summary account of the customer's purchases and points while a member of any of the Membership Groups in the store. This is a cumulative amount and therefore reflects information about all of the customer's past and current memberships within the store. The majority of these variables is for information purposes only and cannot be edited.

- **Customer ID:** This is the ID number created when this account was established as a customer in the store.
- **Member ID:** This is the ID number created when this account was established for the first time as a member of a Membership Group within this store.
- **Total Purchases:** This is a record (at the moment this tab is viewed) of the total dollar amount of purchases made by this customer while a member of any Membership Groups in the store. This information is not editable.
- **Total Discounts:** This is a record (at the moment this tab is viewed) of the total dollar amount of discounts received by this customer while a member of any Membership Groups in the store. This information is not editable.
- **Total Points Earned:** This is a record (at the moment this tab is viewed) of the total number of points earned by this customer while a member of any Membership Groups in the store. The storefront owner can edit this amount giving him control over the total number of points the customer has earned.
- **Total Points Spent:** This is a record (at the moment this tab is viewed) of the total number of points spent by this customer while a member of any Membership Groups in the store.



## Customer Page (The Account Screen)

[Home](#)[All Products](#)[Account](#)[Basket](#)[Search](#)[Checkout](#)

### Edit Account Information

[Logout](#)

**Bold** = Required

*Italic* = Optional

**Username:**

**Email Lost Passwords To:**

**Password:**

**Confirm Password:**

You have accumulated a total of 0 unspent points.  
You can redeem a maximum of 0 points on this order, saving you 0.00.

Status	Membership	Start Date	Expire Date
Current	10% Off Level 1 Membership	10/13/2010	11/12/2010

#### Ship To:

**Bill To:**  same as shipping

**First Name:**

**Last Name:**

**Email Address:**

**Phone Number:**

*Fax Number:*

*Company:*

**Address:**

*Address 2:*

**City:**

**State/Province:**

*Other State/Province:*

**Zip/Postal Code:**

**Country:**

Become A Member?

**Membership Code:**



When a customer places a Membership Code into the text box above, clicks on Join Now and checks out of the store, he will be entered into the corresponding Membership Group and will be charged the Membership Sign Up fee established in the template for this membership Group. If a customer wants to join more than one group, he must return to the Account Screen and add another Membership Code to this box, click on Join Now and check out of the store. Once a customer is a member of all available Membership Groups, the “Become a Member” section of this Screen will no longer be available to this customer.

## Customer Page (Redeem Points / Payment Screen)

<a href="#">Home</a>	<a href="#">All Products</a>	<a href="#">Account</a>	<a href="#">Basket</a>	<a href="#">Search</a>	<a href="#">Checkout</a>
----------------------	------------------------------	-------------------------	------------------------	------------------------	--------------------------

### Order Details

Item	Qty.	Item Price	Total Price
Test1 - Test1	25	\$1.00	\$25.00
Special: Discount		(\$0.10)	(\$2.50)
		<b>Total:</b>	<b>\$22.50</b>

### Payment Method: American Express

**Bold** = Required  
*Italic* = Optional

Name on Card:

Card Number:

Expiration Date:  /

[Continue](#)

[Redeem Points](#)

You have accumulated a total of 0 unspent points.  
You can redeem a maximum of 0 points on this order, saving you 0.00.

A customer who has accumulated points that he can use to pay for purchases will see a screen similar to the one above as he checks out of the store. He can choose to redeem points for the current purchase or he can choose to pay for the entire order using the normal payment methods.

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n this section, he can also view the total number of points he has accumulated in the program. If he is purchasing products that are not permitted to be paid for using points, he will not be given



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the option to Redeem Points for checkout. If a subset of products that he is checking out with may be paid for with points but not all of the items in the order can be paid for with points, he will only be permitted to use points for the total amount in the order that is redeemable. If you have not limited the products that can be purchased using points, then the customer will not be constrained as described above and will be able to apply all of his accumulated points toward the purchase. Please note that the customer may not choose the number of points that he wants to apply to a purchase - this is calculated for him given the constraints determined in the Membership Template by the storeowner and given the total accumulated points available for use for this customer.

If you would like to alter the wording or design pictured above for the Redeem Points section, you can do so by altering the provided StoreMorph template

When the customer chooses to redeem points for the purchase of the items in the order, they may still need to enter payment information if the Membership Template does not allow shipping and tax to be paid for with points.



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## Appendix A: Technical Notes

### Members Must Log In to Receive Discounts

This module makes advanced use of the price and availability group features of Miva Merchant. These features only apply to customers that create an account in the store. Thus, stores that do not use customer accounts will not be able to take advantage of any of the features provided

\*Technical Note: Users can log-in \*after\* filling their basket. The basket prices will be revised to reflect the discount prices after login.

### Membership Fees

Membership signups that require no fee (ie: zero cost of entry) and are performed via "signup code" (ie: on account screen) take effect immediately. Customers then can immediately see the discounts available to this group. Membership signups that require a fee (either via signup code or by purchasing a membership-entry product) require checkout before the entry into the group is processed.

When a member is automatically joined into a group (ie: usually via accumulated points, etc), they will not be charged any fees that may have been associated with joining that group via other means (ie: purchase product or enter membership code).

Creating a group that charges a fee for entry can be accomplished in two ways:

a) Assigning a fee to the Membership Template. This gets applied as a basket charge line-item to the basket.

b) Assigning a membership product. The product get's added to the basket with the price (etc) assigned to this product. It should be an active and available product.

In the event both fields are configured in a membership template, the membership product method applies first (thus the product price in the event they are different prices). If the membership product is not available (ie: in an availability group, not found, etc) then the basket charge method is used (and the fee associated with the entry is charged). Under both mechanisms, the customer **MUST** check out of the store before they are placed in the Membership.

The only way to instantly become a member of a group without checkout is if the membership fee for a template is zero (with no associated product to purchase for entry), or the membership template is designated to automatically apply to all customers.



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## Membership Points

Membership points begin to accrue as soon as the "Enable Points System" is checked. Setting the "Points Spent Per Dollar" allows the customer to redeem these points for discounts. Higher "points-per-dollar" means lower value per point;

ex: 10 points per dollar - Each point is worth 10 cents

ex: 1 point per dollar - Each point is worth \$1

ex: .5 points per dollar - Each point is worth \$2

Setting "points-per-dollar" to zero causes one NOT to be able to redeem points, though the points are still accrued. This allows one to initially accrue points before deciding on the points scheme, or allows one to configure membership levels based on points.

Tracked order totals (and thus number of points accumulated) are based on the order subtotal (ie: total - tax - shipping - redemption discounts). In other words, one does not get points "back" when purchasing with points. Tax and shipping charges are excluded from the points earned. Tax and shipping are \*optionally\* excluded from points redemption (configurable).

## Automatic Membership Signup Processing Order (AutoJoins)

Memberships to groups can be made "automatic" by specifying if a customer has a certain number of points, purchases, belongs to avail groups, etc. This is the "progression" from level 1 to level 2, etc. When these are made "exclusive" as, one must take care to ensure they are displayed (and thus evaluated) in the proper order. The progression happens when a customer logs in. The account is reviewed and each template is processed to determine any new memberships that should be applied due to purchases, etc., and what memberships should be expired due to the same criteria.

These validations occur in Template Order (ie: the view you see when editing Membership Templates- which is alphabetically by template code). Therefore, progressions should use template codes that display from lowest to highest, top to bottom. ie: LEVEL1, LEVEL2, LEVEL3. If you make them LEVEL\_STANDARD, LEVEL\_SILVER, LEVEL\_GOLD, they would display: LEVEL\_GOLD, LEVEL\_SILVER, LEVEL\_STANDARD.

This may cause the membership progression code to be processed out of the presumed template order. A customer would first be progressed to LEVEL\_GOLD (removing them from all other groups), then LEVEL\_SILVER (removing them from all other groups) and finally LEVEL\_STANDARD. In other words, the progression can break due to certain constraints; a customer would never get over LEVEL\_STANDARD, since this is the last one they would be automatically put into.



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The remedy to this problem is to ensure that each level of a membership progression contains both upper and lower constraints (ie: total purchases) that do not overlap, and not to use the “exclusive” flag except when absolutely necessary.

### **Automatic Signup Occurs Once**

Automatic signups to various memberships for any reason (total purchases, member of availability group, etc) only occurs once for any particular customer and group. Meaning if a customer becomes a member of a particular group as a result of being a member of an availability group, this only happens once. After the new membership expires, the customer does **not** automatically re-enter this group at a later date just because he is still a member of the availability group.

### **Exclusive Groups**

The "Exclusive" flag of a membership template only takes affect when a member joins (or is promoted to) the exclusive group. All other memberships are then "expired" automatically. However, automatic group processing **continues** in the membership template order described above. Thus, after becoming a member of an exclusive group, one can **still** join other non-exclusive groups.

This is useful for providing storewide sales that are applied to all members, even **if** they are already a member of an exclusive group. Simply ensure that the sale membership template appears **beneath** all other exclusive templates in the template list.

### **Expiration Dates and Durations**

When both an expiration and a membership duration are used, the lesser of the two determines the actual membership expiration. ie: If a membership Length is 30 days, but the membership expiration date is set to 15 days away, the lesser of the two in duration causes the member to be "kicked out" of the group in 15 days. Vice versa works as well.

\*Technical Note: The Begin Date of a group is 00:00:01AM on the date specified- it includes the full day. The End Date of a group is 11:59:59PM on the date specified- it includes the full end-day.



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## Appendix B: Configuration Tips

### **Configuration of a Holiday Sale**

Here's an example configuration for a date-specific based sale. This sale will automatically apply to all customers that log into the store:

1. Create a Price Group for the sale, ie, Holiday Sale.
  2. Set the Price Group discount to the desired percent.
  3. Assign all products in the store that are discounted for the holiday sale to the Holiday Sale Price Group.
  4. Create a membership template such as SALE1 (Holiday Sale)
- Set the holiday sale begin date (ie: 12/15/2003)
  - Set the holiday sale end date (ie: 12/31/2003)
  - Check the box "Automatically Enroll All Customers"
  - Click the Availability Group "Holiday Sale" in the membership template

Now all customers will automatically be entered into the proper price group (Holiday Sale) beginning on 12/15/2003. They will also be automatically removed from this price group at the end of the day of 12/31/2003.



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