Membership SuperMod
for Miva Merchant™

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

Product Manual

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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 storeowner 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

- User Interface Independent: Utilizes standard features of Miva Merchant for setting discounts and availability. Can be used with MMUI and OpenUI.
- 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 storeowner 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
  - 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

When the Membership SuperMod is used with Dynamic Templates for MMUI-based stores or with the OpenUI SuperMod for OpenUI-based stores, the storeowner can take advantage of the templates and tokens available in these modules thus allowing the storeowner to tailor the module output to his specific needs.

Product Requirements:

The major features of the Membership SuperMod are provided through the standard Miva Merchant API. Thus, this module can be used in any Miva Merchant 4.x store. However, in order to redeem points at checkout and fully customize the module display and layout features, you must be using a UI module that provides templates or tokens- either OpenUI or MMUI with the Copernicus DynamicTemplate Engine. OpenUI users who also have the OpenUI SuperMod can perform additional customizations that are not available when just using OpenUI.

- Uncompiled Miva Merchant 4.00-4.13:
  - OpenUI 4.9+ based stores
  - MMUI based stores
- Miva Merchant 4.14+
  - OpenUI 4.9+ based stores:
  - MMUI based stores

Feature Matrix

Feature	MMUI 4.00-4.13	OUI 4.00-4.13	MMUI 4.14+	OUI 4.14+	MMUI/DYNTMPL 4.14+	OUI/OUISM 4.14+
Automatic group memberships based on purchase history	X	X	X	X	X	X
Display discounts from price groups in basket	X	X	X	X	X	X
Update price of all items in basket after logging into account	X	X	X	X	X	X
Accumulate points based on purchase history	X	X	X	X	X	X
Track customer total purchases in dollars	X	X	X	X	X	X
Apply previous customer purchase history in customer account on first use	X	X	X	X	X	X
Create Time-Expired Sales	X	X	X	X	X	X
Create "Progressive" Membership Programs	X	X	X	X	X	X
Permit Membership sign-up via Membership Code	X[1]	X	X[1]	X	X	X
Permit membership sign-up via purchase of a named product	X	X	X	X	X	X
Automated sign-ups based on purchase history, points accumulated or points spent	X[2]	X	X[2]	X	X	X
Redeem Points at CheckOut		X		X	X	X
Display number of points earned and number available to spend at checkout		X		X	X	X
Display current membership groups and expiration dates		X		X	X	X
Customize all screen displays using headers/footers and tokens		X		X	X	X
Customize all screen displays using templates					X	X

*Note 1: The membership sign-up form must be created manually in a header or footer. No signup feedback is possible since tokens are not available. Further, the signup code must be associated with a product for purchase, as MMUI will not allow checkout without a product in the basket.

*Note 2: Spending of points is generally not available for MMUI based stores without the DynamicTemplate Engine.

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. 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 storeowner 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 storeowners utilize templates or tokens (either via the DynamicTemplate Engine for MMUI or OpenUI) 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.

Availability Groups

An availability group allows the storeowner 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.

Template and Token Engine Theory

In order to provide maximum flexibility and customization capability, the display portions of this module are provided in the following formats: static HTML for MMUI headers and footers, OpenUI token based HTML for OUI Headers and footers, and templates for use with either the DynamicTemplate Engine for MMUI or with the OpenUI SuperMod (DynamicTemplates are a combination of HTML and OpenUI™ compatible tokens). Further, a set of Virtual Modules have been provided for easy placement of the included template files at the default locations in an OpenUI/OpenUI SuperMod based store. Since the HTML is directly editable by the store administrator, these screens provide a level of customization potential never before seen in compiled Miva Merchant stores.

Note: The Copernicus DynamicTemplate Engine is only available for Miva Merchant 4.16+.

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 storeowner a tangible way to reward customers for their loyalty and to provide discounts and sales to customers. This SuperMod allows the storeowner 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 storeowner 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. In order to provide redemption capabilities, the storeowner must be using a token-enabled display module such as the Dynamic-Template Engine for MMUI 4.16+ or OpenUI.

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 tokenized HTML necessary to provide point-redemption on the Order Payment Information screen of the Miva Merchant store.

The storeowner 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 storeowner collects these necessary expenses from the customer during checkout. Further, the storeowner 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 storeowners, others would like to tell the customer about the discounts they are receiving. Certain display modules such as the OpenUI SuperMod can also be utilized to display strike-through pricing on product pages. 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.

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 storeowner 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.

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

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 storeowner: 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.

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. You also must have the OpenUI SuperMod installed in this store. You will then need to install the included templates and Virtual Modules (VMods) into the OpenUI SuperMod.

Module Domain Installation

1. Go into the Miva admin (*admin.mv)*
2. Open the **Modules** branch
3. Click on the **Add Module** link and the screen pictured below will appear
4. Click the **Upload** button
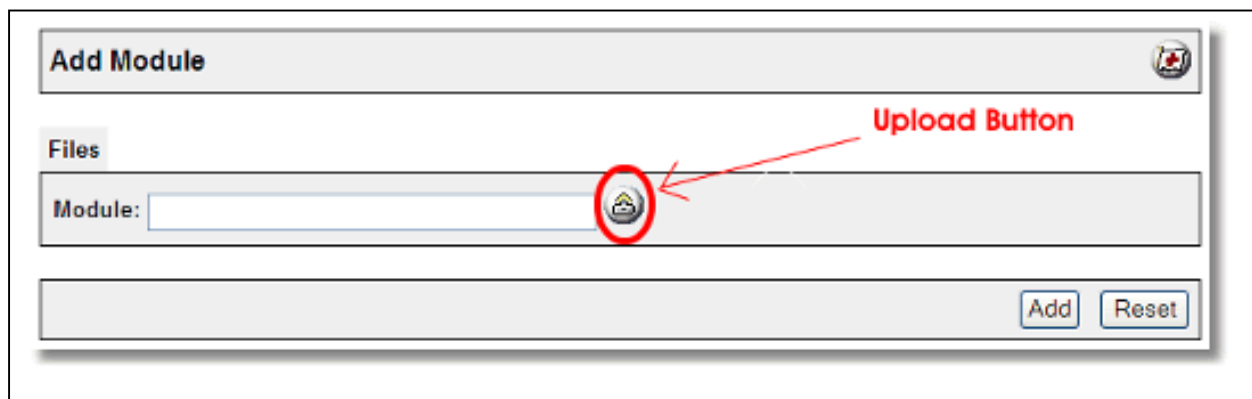
5. A Pop-Up window, like the one pictured below, appears and allows you to either **Browse** to find the module on your local drive or enter the filename of the module.
6. Press the **Upload** button
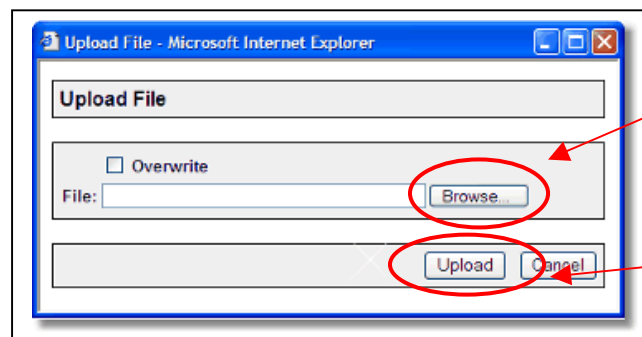
7. Once you press the Upload button, the Upload File PopUp box disappears and the Add Module box is again visible. Press the **Add** button

8. Now the module has been installed in the domain. Next you need to install the module in the store

7. This is the Add button

Store Installation of Module

1. Go to the Miva admin *(admin.mv)*
2. Open the **Stores** branch
3. Click on the arrow next to the store name
4. Click on **(Store) Utilities**
5. Check the checkbox next to the module name. (For this module it is *CBS – Membership SuperMod)*

5. Click the checkbox next to the module name

6. Press the **Update** button at the bottom of the screen.
7. A PopUp box appears that looks like the picture below. Enter the *Membership SuperMod* license key you got when you purchased the module license.
8. Read the *License Agreement*
9. Check the box next to **I ACCEPT THE TERMS AND CONDITIONS OF THE LICENSE AGREEMENT**
10. Press the **Update** button. Now you have successfully installed the module in the storefront and you are ready to use it!

7. Enter the license key here

9. Accept the license agreement here

10. Press the Update button

Templates, OpenUI Footers and/or VMod Installation (Optional)

If you desire to edit the default display or provide code-based membership signups and point redemptions, you should install the templates, Virtual Modules or OpenUI headers and footers described below. To use the template files, you must be using either the OpenUI SuperMod or the DynamicTemplate engine for MMUI. The templates included with the module distribution should be placed in your "mivadata" directory.

OpenUI Token Based Standard Installation

Three OpenUI-token based headers and footers are provided for OpenUI users. Each of these headers and footers are optional, but provide features for use by your customers. Insert each of these into the indicated header section of your store configuration. These headers and footers are easily customizable to meet your specific membership system needs.

*Note: a text file is included in the distribution for simple copy-and-paste editing of your OpenUI headers. **Do not use the OpenUI Token Based display if you are using full screen templates for the customer account screen via the OpenUI SuperMod or DynamicTemplate Engine.**

```
Edit Customer Account Footer: Show Current Memberships
============================================================================
%module|SUPMEMBER|OPENTABLES%
<TABLE BORDER = 0 CELLPADDING = 2 CELLSPACING = 0 WIDTH = "100%">
<TR><TD ALIGN = "left" VALIGN = "middle" NOWRAP>
    <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE = "%VAR(OUI_Store.d.body_fsize|ee)%">
    You have accumulated a total of %module|SUPMEMBER|PTSMEMBERSHIP_CANREDEEM% unspent
points.<br>
    You can redeem a maximum of %module|SUPMEMBER|PTSMEMBERSHIP_MAXREDEEM% points on this order,
saving you %module|SUPMEMBER|PTSMEMBERSHIP_MAXVALUE%.
    </FONT>
</TD><TD ALIGN = "left" VALIGN = "top" WIDTH = "99%">
     
</TD></TR>

<TR><TD ALIGN = "left" VALIGN = "middle" COLSPAN = "2">
    <BR>
</TD></TR>

%module|SUPMEMBER|MEMBERSHIP_FINDFIRST%
%IF(g.CBSMS_okay)%
    <TR><TD ALIGN = "left" VALIGN = "middle"  COLSPAN = "2" NOWRAP>
        <TABLE BORDER = 0 CELLPADDING = 2 CELLSPACING = 0 WIDTH = "100%">
        <TR><TD ALIGN = "left" VALIGN = "middle" BGCOLOR = "%VAR(OUI_Store.d.lhdr_bg|ee)%"
NOWRAP>
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"%VAR(OUI_Store.d.lhdr_fsize|ee)%" COLOR = "%VAR(OUI_Store.d.lhdr_fg|ee)%">
            <B>Status</B>
            </FONT>
        </TD><TD ALIGN = "left" VALIGN = "middle" BGCOLOR = "%VAR(OUI_Store.d.lhdr_bg|ee)%"
NOWRAP>
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"%VAR(OUI_Store.d.lhdr_fsize|ee)%" COLOR = "%VAR(OUI_Store.d.lhdr_fg|ee)%">
            <B>Membership</B>
            </FONT>
```

```
        </TD><TD ALIGN = "left" VALIGN = "middle" BGCOLOR = "%VAR(OUI_Store.d.lhdr_bg|ee)%"
NOWRAP>
            <FONT FACE = "%VAR(OUI_Store.d.lhdr_font|ee)%" SIZE =
"%VAR(OUI_Store.d.lhdr_fsize|ee)%" COLOR = "%VAR(OUI_Store.d.lhdr_fg|ee)%">
                <B>Start Date</B>
                </FONT>
        </TD><TD ALIGN = "left" VALIGN = "middle" BGCOLOR = "%VAR(OUI_Store.d.lhdr_bg|ee)%"
NOWRAP>
            <FONT FACE = "%VAR(OUI_Store.d.lhdr_font|ee)%" SIZE =
"%VAR(OUI_Store.d.lhdr_fsize|ee)%" COLOR = "%VAR(OUI_Store.d.lhdr_fg|ee)%">
                <B>Expire Date</B>
                </FONT>
        </TD><TD ALIGN = "left" VALIGN = "middle" BGCOLOR = "%VAR(OUI_Store.d.lhdr_bg|ee)%"
NOWRAP>
            <FONT FACE = "%VAR(OUI_Store.d.lhdr_font|ee)%" SIZE =
"%VAR(OUI_Store.d.lhdr_fsize|ee)%" COLOR = "%VAR(OUI_Store.d.lhdr_fg|ee)%">
                 
                </FONT>
        </TD><TD ALIGN = "left" VALIGN = "middle" BGCOLOR = "%VAR(OUI_Store.d.lhdr_bg|ee)%" WIDTH
= "99%">
            <FONT FACE = "%VAR(OUI_Store.d.lhdr_font|ee)%" SIZE =
"%VAR(OUI_Store.d.lhdr_fsize|ee)%" COLOR = "%VAR(OUI_Store.d.lhdr_fg|ee)%">
                 
                </FONT>
        </TD></TR>

        %WHILE(g.CBSMS_okay)%
            <TR><TD ALIGN = "left" VALIGN = "middle" NOWRAP>
                <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE =
"%VAR(OUI_Store.d.body_fsize|ee)%">
                    %module|SUPMEMBER|MEMBERSHIP_STATUS%
                    </FONT>
            </TD><TD ALIGN = "left" VALIGN = "middle" NOWRAP>
                <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE =
"%VAR(OUI_Store.d.body_fsize|ee)%">
                    <I>%module|SUPMEMBER|MEMBERSHIP_NAME%</I>
                    </FONT>
            </TD><TD ALIGN = "left" VALIGN = "middle" NOWRAP>
                <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE =
"%VAR(OUI_Store.d.body_fsize|ee)%">
                    %module|SUPMEMBER|MEMBERSHIP_ORGDATE%
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            </TD><TD ALIGN = "left" VALIGN = "middle" NOWRAP>
                <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE =
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                    %module|SUPMEMBER|MEMBERSHIP_ENDDATE%
                    </FONT>
            </TD><TD ALIGN = "right" VALIGN = "middle" NOWRAP>
                <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE =
"%VAR(OUI_Store.d.body_fsize|ee)%">
                     
                    </FONT>
            </TD><TD ALIGN = "left" VALIGN = "top" WIDTH = "99%">
                 
                </TD></TR>

            %module|SUPMEMBER|MEMBERSHIP_FINDNEXT%
        %WHILEEND%
        </TABLE>
    </TD></TR>

    <TR><TD ALIGN = "left" VALIGN = "middle" COLSPAN = "2">
        <BR><BR>
    </TD></TR>
%IFEND%
</TABLE>
```

```
Edit Customer Account Footer: Show Membership Join Form
================================================================================
%module|SUPMEMBER|OPENTABLES%
<TABLE BORDER = 0 CELLPADDING = 2 CELLSPACING = 0 WIDTH = "100%">
<TR><TD ALIGN = "left" VALIGN = "middle" COLSPAN = "3" BGCOLOR = "%VAR(OUI_Store.d.lhdr_bg|ee)%">
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= "%VAR(OUI_Store.d.lhdr_fg|ee)%">
  <B>Become A Member?</B>
  </FONT>
</TD></TR>

%module|SUPMEMBER|MEMBERSHIP_OPENJOINFORM%
%IF(g.CBSMS_joinmsg)%
  <TR>
    <TD ALIGN = "left" VALIGN = "middle" COLSPAN = "2" NOWRAP>
      <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE = "%VAR(OUI_Store.d.body_fsize|ee)%"
COLOR = "red">
      %VAR(g.CBSMS_joinmsg)%
       </FONT>
    </TD><TD ALIGN = "left" VALIGN = "top" WIDTH = "99%">
       
    </TD>
  </TR>
%IFEND%

<TR><TD ALIGN = "left" VALIGN = "middle" NOWRAP>
  <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE = "%VAR(OUI_Store.d.body_fsize|ee)%">
  <B>Membership Code:</B>
  </FONT>
</TD><TD ALIGN = "left" VALIGN = "middle" NOWRAP>
  <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE = "%VAR(OUI_Store.d.body_fsize|ee)%">
  <INPUT TYPE="text" NAME = "CBSMS_Membership" VALUE = "%VAR(g.CBSMS_Membership)%">
  </FONT>
</TD><TD ALIGN = "left" VALIGN = "top" WIDTH = "99%">
   
</TD></TR>

<TR><TD ALIGN = "left" VALIGN = "middle">
   
</TD><TD ALIGN = "left" VALIGN = "middle" NOWRAP>
  %module|SUPMEMBER|MEMBERSHIP_JOINBUTTON%
</TD><TD ALIGN = "left" VALIGN = "top" WIDTH = "99%">
   
</TD></TR>

</TABLE>
%module|SUPMEMBER|MEMBERSHIP_CLOSEJOINFORM%
```

```
Checkout: Order Payment Information Footer: Redeem Points Form:
========================================================================
%module|SUPMEMBER|OPENTABLES%
%module|SUPMEMBER|MEMBERSHIP_OPENREDEEMFORM%

<TABLE BORDER = 0 CELLPADDING = 2 CELLSPACING = 0 WIDTH = "100%">
<TR><TD ALIGN = "left" VALIGN = "middle" COLSPAN = "3" BGCOLOR = "%VAR(OUI_Store.d.lhdr_bg|ee)%">
    <FONT FACE = "%VAR(OUI_Store.d.lhdr_font|ee)%" SIZE = "%VAR(OUI_Store.d.lhdr_fsize|ee)%"
COLOR = "%VAR(OUI_Store.d.lhdr_fg|ee)%">
    <B>%module|SUPMEMBER|PTSMEMBERSHIP_NAME%</B>
    </FONT>
</TD></TR>

<TR><TD ALIGN = "left" VALIGN = "middle">
    <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE = "%VAR(OUI_Store.d.body_fsize|ee)%">
    %module|SUPMEMBER|MEMBERSHIP_REDEEMBUTTON%
    </FONT>
</TD><TD ALIGN = "left" VALIGN = "middle" NOWRAP>
    <FONT FACE = "%VAR(OUI_Store.d.body_font|ee)%" SIZE = "%VAR(OUI_Store.d.body_fsize|ee)%">
    You have accumulated a total of %module|SUPMEMBER|PTSMEMBERSHIP_CANREDEEM% unspent
points.<br>
    You can redeem a maximum of %module|SUPMEMBER|PTSMEMBERSHIP_MAXREDEEM% points on this order,
saving you %module|SUPMEMBER|PTSMEMBERSHIP_MAXVALUE%.
    </FONT>
</TD><TD ALIGN = "left" VALIGN = "top" WIDTH = "99%">
     
</TD></TR>

<TR><TD ALIGN = "left" VALIGN = "middle" COLSPAN = "3">
    <BR><BR>
</TD></TR>
</TABLE>

%module|SUPMEMBER|MEMBERSHIP_CLOSEREDEEMFORM%
```

OpenUI with OpenUI SuperMod Templates and Virtual Modules

Several OpenUI SuperMod based templates and Virtual Modules (VMods) are provided for OpenUI users who also have the OpenUI SuperMod. Each of these VMods and templates are optional, but provide features for use by your customers. Insert the VMods into your OpenUI SuperMod to place the display sections in pre-determined locations that are slightly different from the OpenUI Header and Footer display. These VMods and templates are easily customizable to meet your specific membership system needs.

1. Locate the template file(s) that must be added to the mivadata directory. They are:
    a. supmember.stats.tmpl – Current member statistics on Account screen
    b. supmember.join.tmpl – Code-based membership join form
    c. supmember.redeem.tmpl – Point redemption on Order Payment Information screen
2. Using your favorite FTP client with the "binary transfer" option enabled, FTP the .tmpl files to your "mivadata" directory. Please note: your host may have named this folder something different than "mivadata" therefore if you do not have a directory specifically called "mivadata" you will need to ask your host what this folder is named. For reference, typically, the Merchant2 folder is inside the mivadata directory.
3. Insert the following VMod Virtual Packet Strings into your OpenUI SuperMod
    a. Membership SuperMod Join
    b. Membership SuperMod Redeem
    c. Membership SuperMod Stats

```
OSM:Membership+SuperMod+Join^09117000BasketList.d.cust_id%7E0%7E52%7Cg.CBSMS_
anyJoin%7E%25module%7CSUPMEMBER%7CMEMBERSHIP_ANYJOIN%25%7E9%7Cg.CBSMS_anyJoin
%7E0%7E52%7C%7Esupmember.join.tmpl%7E8^09120000g.OUIX_text%7Eg.CBSMS_joinmsg%
7E2

OSM:Membership+SuperMod+Redeem^14063000BasketList.d.cust_id%7E0%7E52%7Cg.CBSM
S_maxRedeem%7E%25module%7CSUPMEMBER%7CPTSMEMBERSHIP_MAXREDEEM%25%7E9%7Cg.CBSM
S_maxRedeem%7E0%7E52%7C%7Esupmember.redeem.tmpl%7E8

OSM:Membership+SuperMod+Stats^09025000BasketList.d.cust_id%7E0%7E52%7Cg.CBSMS
_okay%7E%25module%7CSUPMEMBER%7CMEMBERSHIP_FINDFIRST%25%7E9%7Cg.CBSMS_okay%7E
0%7E52%7C%7Esupmember.stats.tmpl%7E8
```

*Note: The mivadata directory is sometimes called "htsdata" and is generally **not** in your main website directory. If you cannot find your mivadata directory, contact your host for assistance.*

Note 2: The templates and VMod strings are included in a text file in the distribution for simple cut-and-paste use.

Follow these steps to install a VMod Virtual Packet String into the OpenUI SuperMod

1. Inside your Miva admin, go to the System Extension Configuration section
2. Click on the tab that says CBS-OpenUI SuperMod
3. You will see a large blank box at the top of the screen with the words "Virtual Packet String" above it
4. Copy and paste one VPS (from a text file, email, website) into this blank box.
    a. Be sure you copy only the code of the VPS including the "OSM" letters and all the subsequent code.
5. Click Update
6. The VPS then will become a Virtual Module in the OpenUI SuperMod.
7. Repeat this process for each individual VPS you want to install into the OpenUI SuperMod

Add the Virtual Packet String here and click Update.

MMUI Based Installation – Standalone

While this module can be used with MMUI, the display sections for the following features will not be available or will only have limited display capabilities. The module uses special forms for joining membership groups and points redemption during checkout; they should be displayed on the Customer Account and Order Payment Information screens respectively. Template and token-based forms are available when using a token-enabled user interface. In order to use the templates and tokens in your MMUI store, use the DynamicTemplate Engine for MMUI (available for MM4.16+ and sold separately).

1. Membership Join via secret code: Customers will still be able to join membership groups by purchasing the named membership product from the membership template. The storeowner may be able place a static HTML form in any header or footer in an MMUI based store that allows membership signups, though no feedback will be available to the customer indicating success or failure of the join code.
2. Membership Statistics: This is merely a display feature that shows the customers what groups they have joined, when they joined and when the membership will expire. No functionality is lost when not displaying this information in the account screen.
3. Points redemption at CheckOut: The storeowner may be place a static HTML form at checkout that will permit users to redeem points. However, no display of the number of points *available* to the customer is possible. Redeemed points are added to the basket allowing the customer to see how many points are redeemed. Simply paste the supplied HTML (editing the FORM ACTION element as necessary) in the Customer Payment screen footer.

The supplied form template can be used and modified for direct insertion into the code of your MMUI for improved processing. When used as-is in a global footer, the customer may be required to re-enter their shipping and payment information.

Note: Sample static HTML forms are included in a text file in the distribution for simple cut-and-paste use.

```
MMUI Checkout: Order Payment Information Footer: Static HTML Redeem Points Form Example:
===============================================================================
<FORM METHOD = "post" ACTION = "https://www.yourstore.com/Merchant2/merchant.mvc?">
<INPUT TYPE = "hidden" NAME = "Action" VALUE = "">
<INPUT TYPE = "hidden" NAME = "Screen" VALUE = "OPAY">
<INPUT TYPE = "hidden" NAME = "Store_Code" VALUE = "test">
<!--
        Note: These items should be included in the form (and populated correctly)
        if you create this form Via MMUI edits.
        <INPUT TYPE = "hidden" NAME = "ShippingMethod" VALUE = "">
        <INPUT TYPE = "hidden" NAME = "PaymentMethod" VALUE = "">
//-->
<INPUT TYPE = "hidden" NAME = "CBSAction" VALUE = "CBS-SUPMEMBER">
<INPUT TYPE = "hidden" NAME = "CBSSubAction" VALUE = "REDEEMPTS">
<TABLE BORDER = 0 CELLPADDING = 2 CELLSPACING = 0 WIDTH = "100%">
<TR><TD ALIGN = "left" VALIGN = "middle" COLSPAN = "2" BGCOLOR = "#000080">
<FONT FACE = "Arial,Helvetica" SIZE = "" COLOR = "#ffffff">
<B>Redeem Earned Points</B>
</FONT>
</TD>
</TR>
<TR><TD ALIGN = "left" VALIGN = "middle">
<FONT FACE = "Arial,Helvetica" SIZE = "-1">
<INPUT TYPE = "submit" VALUE = "Redeem Points">
</FONT>
</TD><TD ALIGN = "left" VALIGN = "middle" width="80%">
<FONT FACE = "Arial,Helvetica" SIZE = "-1">
When making purchases in our store, you collect points for every dollar spent. If you have
purchased before, you may have points available that can be used for a discount on this order.
Click the "Redeem Points" button above to see if you qualify for a discount.</FONT>
</TD></TR>
<TR><TD ALIGN = "left" VALIGN = "middle" COLSPAN = "2">
<BR><BR>
</TD></TR>
</TABLE>
</FORM>
```

MMUI Based Installation – Miva Merchant 4.16+ with DynamicTemplate Engine

The dynamic template engine provides templates and tokens to compiled Miva Merchant 4.16 stores that utilize MMUI. The following template files should be placed in your mivadata directory in order to display and use the module features that are unavailable to MMUI users without the DynamicTemplate Engine. These template files can be modified to suite the particular needs of the membership system:

1. screen.acnt.tmpl, supmember.stats.tmpl, supmember.join.tmpl – Provides a full screen template for the Account screen with includes for membership signup form and statistics.
2. screen.opay.tmpl, include.order.tmpl, include.basket.tmpl, supmember.redeem.tmpl – Provides a full screen template (with necessary included files) for the Order Payment details screen with points redemption form.

Using your favorite FTP client with the "binary transfer" option enabled, FTP the .tmpl files to your "mivadata" directory. Please note: your host may have named this folder something different than "mivadata" therefore if you do not have a directory specifically called "mivadata" you will need to ask your host what this folder is named. For reference, typically, the Merchant2 folder is inside the mivadata directory.

Module Upgrading

Copernicus publishes updates to its modules when there are significant feature enhancements. Copernicus also published upgrades to its modules for clients who are moving from uncompiled Miva Merchant to compiled Miva Merchant. Both updates and upgrades are added to the storefront in the same way. Once you have saved the update or upgrade to your local hard drive, please follow these instructions to add them to your storefront.

Domain Module Upgrading

1. Go to the Miva admin. (*admin.mv)*
2. Open the **Modules** branch
3. Click on **CBS – Membership SuperMod** module
4. Click on the **Files** link in the content area of the screen

4. Click on the Files link

5.   Click the **Upload** graphic button

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

7. Click the Browse button to find the file.

6. Check the Overwrite checkbox

8. Press the Upload button

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

9. Press the Update button

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 (Stores) Utilities section of the Miva admin:

1. Go to the Miva admin (admin.mv)
2. Click the arrow next to **Stores.** This will open up all of the stores you have in this domain.
3. Click on the arrow next to the name of the store in which you have installed this module.
4. Click on the link "Utilities" 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.
5. Click on the CBS – Membership SuperMod Templates tab.

5. Click this tab to control the module configuration

CBS – Membership SuperMod Tab (Global Configuration)

The Membership SuperMod is first configured in the CBS-Membership Template SuperMod tab in the (Store) Utilities Configuration section. 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.

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

- **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.

- **Global Membership Prerequisite:** This feature is discussed on page 9 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.

CBS – Membership SuperMod Tab (Membership Template Configuration)

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.

- **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.

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.

- **Manual Signup Options:** Customers can signup for a membership group by entering a membership code into their account screen.
  - o **Signup Code:** Specifies the secret code used to gain access to this group
  - o **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 (Store Utilities Section)

This tab allows the storeowner 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.

- **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.

Note: Module provided customer display tabs are only available in compiled versions of Miva Merchant (v4.14+) and uncompiled versions of Miva Merchant if you have installed OpenUI and the OpenUI admin extensions. For more information on OpenUI admin extensions, please visit www.openui.org.

- **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.

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, excluding the customer total points that may be modified here.

Note: Module provided customer display tabs are only available in compiled versions of Miva Merchant (v4.14+) and uncompiled versions of Miva Merchant if you have installed OpenUI and the OpenUI admin extensions. For more information on OpenUI admin extensions, please visit www.openui.org.

- **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 Pages (The Account Screen)

The Customer can join a Membership Group by accessing the Account Screen. It is here that he can place the Membership Code that was provided to him by the storefront owner that signs him up to become a part of the Membership Group associated with the Membership Code.

The customer can join a Membership Group here

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.

Once a customer clicks the Join Now button he will see the following message. If you would like to alter this message, you will need to edit the template that the Membership SuperMod Join VMod refers to. The template is named supmember.join.tmpl. To view instructions regarding VMods and templates used in the OpenUI SuperMod, please consult the product manual for the OpenUI SuperMod.

Upon checkout the subscribing member will see a screen similar to this. Note that the SignUp Code and Membership Template Name are visible to the customer.

Customer Pages (Redeem Points)

A customer who has accumulated points that he can use to pay for purchases will see a screen similar to the one below 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. In 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 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 template that is referred to in the Redeem Point Form VMod. The name of the template that is used in this VMod is supmember.redeem.tmpl. Please consult the OpenUI SuperMod product manual for instructions on how to alter a VMod.

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.

Customers may still be required to enter payment information even if they have paid for all items in their basket with points. The storeowner can set the Membership Template to not allow customer to pay for shipping and tax with points.

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.

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 with $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.

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.

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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