

Etail Systems Tip Sheet

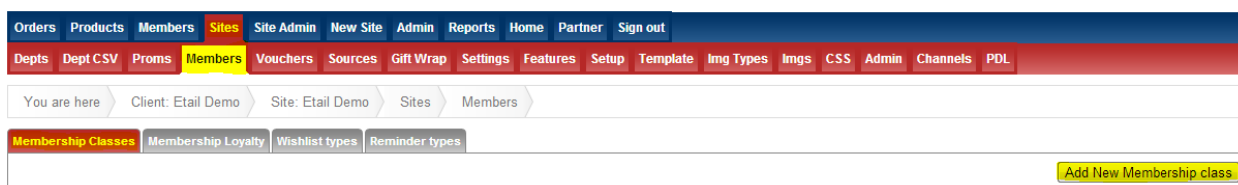
Objective: To add a membership class in COMS, for trade registration purposes or loyalty discounts.

The following tells you how to achieve this;-

Membership classes are very handy, either for controlling trade accounts & discounts, or if you have a loyalty scheme in place, you can set different discounts for different member levels (the loyalty scheme for your customers is at an extra cost, please contact us if you're interested in this).

Creating a membership class

To create a new membership class, you'll need to do to Sites > Members & the first tab you land on, Membership Classes. Click 'Add New Membership Class' to start adding a customer's information.



You'll see this screen. See below for more information on each option:

A screenshot of the 'Add/Edit Membership Class' form in the Etail Systems application. The form has a 'Return to listing' button at the top left. The main section is titled 'Add/Edit Membership Class'. It contains several fields and checkboxes: 'Membership class description:' with a text input field; 'Trade Prices:' with four checkboxes (1, 2, 3, 4) and a 'Price break:' checkbox; 'Credit Account:' with a checkbox; 'Quick order on basket:' with a checkbox; 'Hide basket info page:' with a checkbox; 'Zero value checkout:' with a checkbox; 'Minimum order value:' with a text input field set to '0.00' and a label 'Minimum value of PRODUCTS (after discounts) in basket to allow checkout'; and an 'Add new Membership class' button at the bottom left.

Membership class description – Call this whatever you wish, for your reference.

Trade Prices – Tick box 1 “Allows Members in this class to checkout using Wholesale prices (with discounts applied to the wholesale prices)”.

This means that if you have any products that are on a retail site as well as a trade site, you input a

‘Wholesale Price’ which will only be shown on your trade site to approved members. You can also have a ‘Wholesale Offer Price’ if any of your trade products need to go on sale.

NB: If you need more than one Trade Membership Price, please contact us.

Price Break – You’ll need to set up price breaks against your products. This is so when they buy X amount of cartons at Wholesale Price 1, they’ll get bumped to Wholesale Price 2 etc. Please ask for the Price Breaks walkthrough if needed.

Credit Account – Ticking this allows members in this class to checkout with an option not to pay and to receive an invoice instead.

Quick order on basket – Members can order items from the basket page by entering the Model No.

Hide basket info page – If any of the following are set up, members automatically bypass these: gift wrap, gift text and delivery date pages.

Zero value checkout – Allow members to checkout with a ‘Zero’ value basket.

Minimum order value – This is the minimum value of the **PRODUCTS (after discounts)** in the basket to allow members to checkout. e.g. 100.00 – it doesn’t need the £.


You can then click ‘Add New Membership Class’.

Additional Extras

Promotion codes - Once you’ve created a membership class, you can add vouchers & promotion codes which will automatically apply at the checkout when the membership is signed in. Please ask for a voucher walkthrough if you need to know how to set them up.

Promotion codes

Add Promotion codes to be applied to this Membership role

Promotion Code	Description	Valid	Valid from	Valid to	
Please select Promotion code					Add Promotion
	£5 off voucher	Live	01/04/2010	30/06/2010	

To add a voucher to your membership class, select one from the dropdown & click ‘Add Promotion’. To remove a voucher from that class, click the red ‘remove’ button.

Product Attribute Restrictions

If you have lots of super attributes against your products but you don’t want certain members to have these options available to them, you can set this up here.

Product attribute restrictions

Adding Product attribute restrictions will remove these attributes from a product when this Membership role is applied

Remark	Name	Type	Status	
Select Product Attribute				Add Restriction
No Product Attribute restrictions have been applied to this Membership role				

Follow the same instructions as the voucher to add & remove.

Assigning a membership class

If you're setting up a membership class for a trade site, we activate the function where members who register have to be approved in COMS before they can see prices & purchase from the site. When creating/editing a member, you need to assign a class to them.

Product attribute restrictions

Adding Product attribute restrictions will remove these attributes from a product when this Membership role is applied

Remark	Name	Type	Status
Select Product Attribute			

No Product Attribute restrictions have been applied to this Membership role

If you're **adding a new member** from Members > Members, you can assign them a class to by selecting from the dropdown 'Membership class'.

Where did you see us? Please select...

Membership class: Please select a Membership Role

If you're **editing a member**, find them through Members > Members, & click the 'edit' button.

Registered Members

Surname... From Date... To Date... Email address... Search

PostCode... All Sites Status Company...

Membership: All Membership roles Affiliates: Any Results order: Date Joined

Source:

No of results: 17 Results per page: 20 Page: 1

	Email	Name	Info	Site	Type	Status	Date joined
1	kim.ross@etailsystems.com	Miss Kim Ross		Etail Demo	Webshop	Live	16/01/2013 11:47

You'll then need the mini tab 'Status Details'.

Miss Kim Ross Address Information **Status Details** Notes Order Information Wishlists Forms and Enquiries

Last update: 11:47 Wednesday, January 16, 2013 (Joined: 11:47 Wednesday, January 16, 2013)

Status: Live

Where did you see us? Please select...

Affiliate: No

Affiliate status: New

Membership: Internet

Membership class: Please select a Membership Role

Minimum order value: 0.00

Select a Membership class for this member

Minimum value of PRODUCTS (after discounts) in basket to allow checkout

Title	Description
Please select	

External Client Code:

Update Member

Send Password Reset Email Create Order

Select which membership class to assign, then click 'Update Member'.

If you need help adding membership classes, please call 0844 482 0908 or email support@etailsystems.com