Silverbear 365

Memberships, Subscriptions and Products – Advanced Module

Empowered Association™

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Approval

Approver	
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Version History

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1.0	September 2020	SUSANNAH PATRICK	CREATED	

Video

Video guide available	Video URL	Last updated

Guide Purpose and Usage

GUIDE PURPOSE

- To accompany the Memberships, Subscriptions and Sales training course
- To continue from the Membership, Subscriptions and Sales Introductory guide
- To help Silverbear clients familiarise themselves with the more detailed functionality of memberships, subscriptions and product sales

INCLUDED

This guide includes

- Creating products to sell
- Setting pricing and payment options
- Creating and managing packages and draw-down membership products
- Enabling product sales on the portal and enhancing a web shop

Please note that the screens and layouts on your Silverbear environment are dependent on your organisation's unique configuration and business requirements, and each individual's access and security settings. Therefore, some of the screenshots and menu options you see will not exactly match up with those on your own screens.

PREREQUESITE GUIDES/COURSES	RECOMMENDED PRIOR GUIDES/COURSE	RECOMMENDED FOLLOW UP COURSE(S)
Fundamentals – Introductory Contacts and Organisations – Introductory Module Memberships, Subscriptions and Products: introductory module Memberships, Subscriptions and Products: Intermediate Module	Finance – intermediate Module	

1. Creating products to sell

In this section we focus on how to create products (tangible products and membership and subscription products) to sell in the CRM and portal. There are further sections which will help you to enhance sales on the portal using additional tools and techniques.

As at the time of this guides creation (August 2021) some aspects of the product setup are accessed through the older style of 365 Navigation.

1.1. Product setup stages

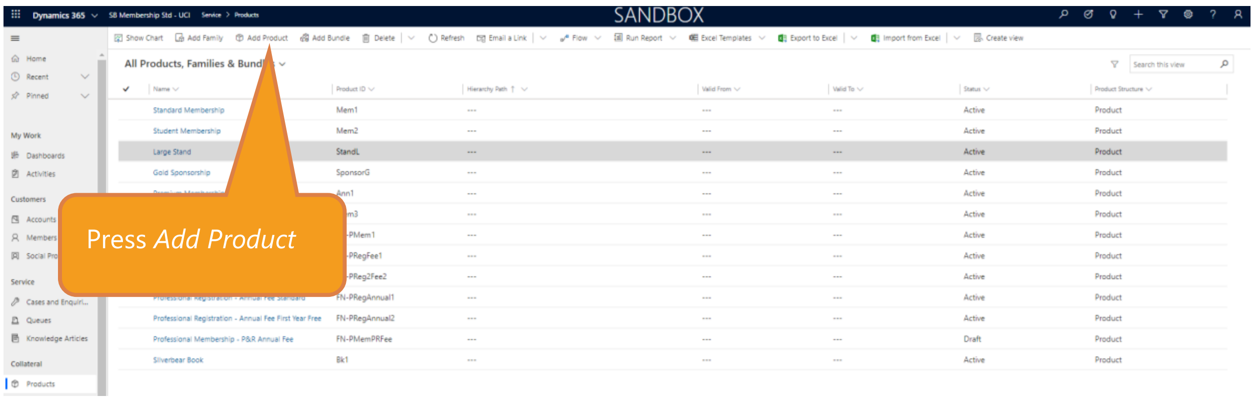
There are several stages to product setup, which will change depending on the type of product you are creating.

- First create the basic product details, e.g. the name, the type of product
- After entering the basic product details go to the relevant section of this guide, e.g. memberships, subscriptions or purchased goods
- Once you have created your product you need to add the its price(s) to your price lists(s). Price Lists are your menus of products and services. You will have more than one price list, for different periods – e.g. this year and next year, but also you can have price lists for different currencies or also different types of customers, e.g. members and non-members
- You can specify payment types (e.g. Direct Debit) that can be used to buy the products
- There are additional setup tasks for products which will appear on the portal
- Your system may be set to Auto Publish and if so, you will see a message at the top of the product setup screen, if it is not then press Publish once you are happy for your new product to be available to sell.

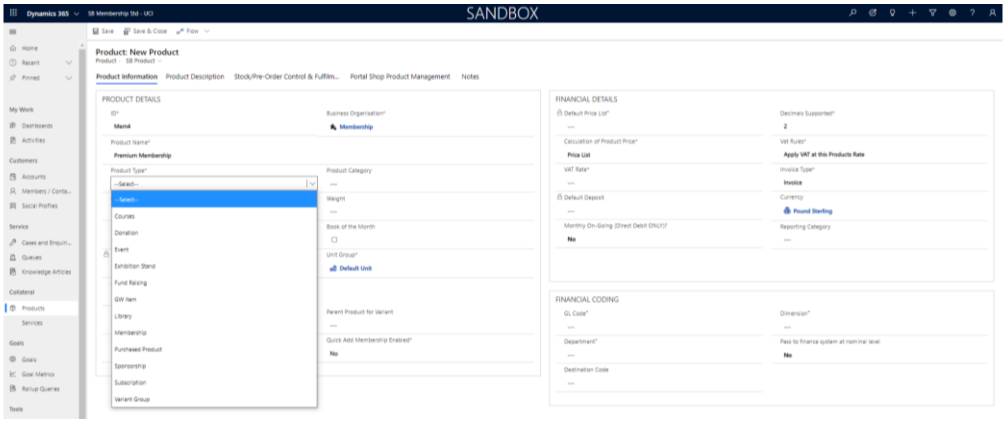
Please note that exhibition stand products, sponsorship and Fundraising products are not included in this guide, they will be included in the Events and Fundraising modules when available.

1.2. Creating the basic product details

- Find the *Products* menu option. This is normally stored in the *Service* work area or the *Marketing* work area. You will be shown a list of your existing products. You may want to access the details for similar products to check how they have been set up, if so, just click on them to view. You can choose to Clone a product if it is very similar to the one you are setting up. Choose *Clone* from the Command Bar and update the ID and Name. Please then use this guide to help you change any unique information for your new product (e.g. the pricing)
- To create a product press, *Add Product* on the command bar



- Enter an *ID* and *Product Name* (you can format these in any way, but please bear in mind that the *Product Name* will appear on your portal if this is to be sold online), and the relevant *Business Organisation* that sells this product
- Then click on the arrow next to *Product Type*, as below. The choice made for the *Product Type* will affect which additional tabs/fields open (e.g. you will see a membership/subscription tab appear if you choose **Membership**).
- The *Product Category* is mainly for reporting purposes; choose the most relevant one
- Choose a *VAT Rate* and the Financial codes which you would like sales of this item to be attached to
- Before you can *Save*, you may need to enter additional fields depending on the type of product you are adding. Please see the relevant section (Membership, Subscription or Purchased product for the next steps)



1.3. Creating Membership Products

After adding the basic information (as described above) there are some specific membership fields that you will need to complete:

- *Membership Category*. Choose the most relevant category; this field is mainly used for reporting purposes
- *Duration/ Month start and end*. These fields are used to define the period of your memberships. Some organisations have memberships which last a number of months from the date of purchase, e.g. 12 months, regardless of when they are bought. Those organisations would enter a Duration (e.g. 12). Some organisations run their memberships from and to specific months (e.g. all memberships start in January and finish at the end of December). Those organisations would enter a Month Start of 1 and Month End of 12
- *Is renewable?* Can this membership be renewed? A typical non-renewable membership could be a graduate membership that members could have once only, and then they are asked to buy a different product, or an entry level reduced fee.
- *Non-lapsable?* Can this membership lapse? A typical non-lapsable membership might be a lifetime or honorary membership.
- *Post Nominal*. If membership grants the holder letters after their name, completing this field means that the post nominal field on a contact record will be populated if a contact holds this membership
- *Upgrade Product*. If you would like the members who buy this product to renew but the product, they renew at is a different product. (e.g. your customers can have a reduced-price membership for a year but at the point of renewal they will automatically be moved on to the full price membership) then make sure *Is Renewable* is ticked but choose the upgrade product in this field. E.g. the Standard Membership. When the discounted membership is sold a PM

Opportunity for the Standard Membership will be created, and this will be used in the renewal process (unless your customer cancelled or regrades it).

- *Expiry/Start Cut off Modes and Cut off dates.* This allows you to define the dates a membership starts and finishes. Some organisations are happy for their memberships to begin immediately, they will start on the date they are purchased and end a certain number of months later. (if Duration is used). Or start immediately and end at the end of the current membership period. If that is the case, then leave these dates blank. If, however you want to ensure that a member's membership always finish at the end of the month, set the Expiry mode to Integer Cut off to 2. That way a 12-month membership purchased on for example the 2nd January will run from 2nd^{h} January to 31st January the next year
- Press Save. You will then be promoted to choose a price list. Choose your standard default price list (likely to be called something like Price List (current year). You may need to change the view in order to select this price list
- If your Silverbear CRM is not set to auto publish (you will see a message if auto publish IS enabled), you will need to press *Publish* on the Command Bar.
- Once you entered this information the next stage is to set the pricing, and if necessary, enable and update for portal sales, please see the later sections on these areas

1.4. Creating Subscription products

- Subscriptions are similar in set ups to memberships. Subscriptions are used in range of different ways, often when there is a product you are offering that is either a non-tangible product that you don't wish to class as one of your membership offerings (e.g. a guest subscription to some of your basic materials on your website for interested parties in your profession). Subscriptions can also be used for purchase of periodicals, e.g. magazines either on or offline. Subscriptions have a separate record type in CRM to memberships, but have some identical fields
- Create the basic product details (*Name, ID, Business Organisation* etc and choose **Subscription** as the *Product Type*). The membership and subscription tab will then become available
- Click on the *Membership/Subscription information* tab
- Use the *Duration/Month End and Date and Cut off* dates exactly as in the membership product
- Use the *Is Renewable* and *Is Lapsable* fields exactly as the membership product

- If your subscription is for a magazine (digital or online) there is specific information you can complete which can appear online depending on your portal design (skinning):

Frequency	-	A drop-down list which defines the frequency of the subscription releases.
Weekly Day of Week	-	For weekly subscriptions, which day of the week is the subscription available.
Price per Issue	-	This field is for reporting purposes only. When adding this product to the price list you will define the actual price for the subscription purchase.
No. of issues per year	-	A numeric value which represents how many issues there are per subscription purchase.
Twice Monthly 1st Day	-	If the frequency has been set to "Twice per month" this indicates which date of the month the first subscription is available. The second subscription is automatically scheduled to be available 14 days later.
Pro-Rata based on No. of Issues	-	A yes/no field of which the default setting is No. If the subscription is made available for monthly purchase, this will allow for pro-rata pricing to be calculated should the transaction occur part way through a subscription cycle (i.e. causing a missed subscription and therefore a reduced price).
Subscription Type Paper	-	Defines if the subscription is paper based.
Subscription Type Digital	-	Defines if the subscription is digital.
Subscription Type ISSN Paper	-	Defines if the paper subscription has an ISSN reference (this is the subscription equivalent to a book's ISBN).
Subscription Type ISSN Digital	-	Defines if the digital subscription has an ISSN reference (this is the subscription equivalent to a book's ISBN).
ISSN Number	-	Set the ISSN here.
Subscription Overseas	-	A yes/no field which indicates if the subscription is offered overseas.

- Once you have entered all the relevant information for your product press *Save*.
- You will then be promoted to choose a *Default Price List*. Choose your standard default price list (likely to be called something like "Price List (current year)". You may need to change the view in order to select this price list
- Press *Save*
- If you want to set up the subscription issues at this stage, continue with the next section, otherwise, if your Silverbear CRM is not set to auto publish (you will see a

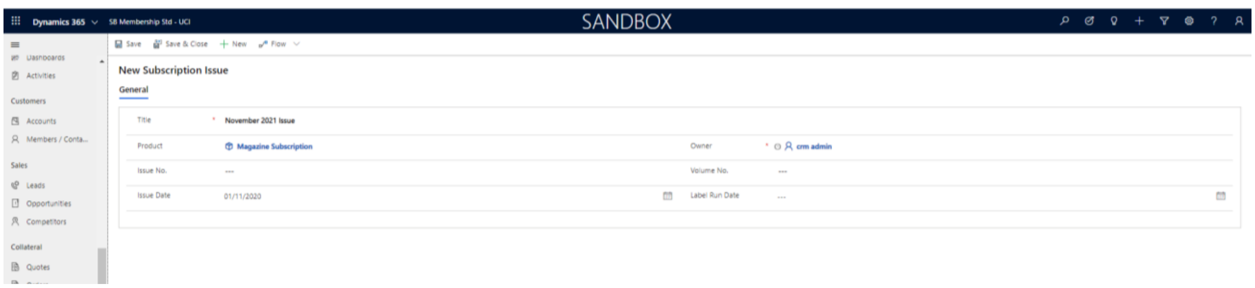
message if auto publish IS enabled) you will need to press Publish on the Command Bar.

- The next step is to set the pricing for your product.

1.5. Creating Subscription Issues

If your subscription product is periodical you can create a record for the individual issues. From the Subscription product, go to *Related* and then choose *Subscription Issues*.

- Click +*Add New Subscription* and complete the *Name* and *Issue date* and volume no if relevant.
- The label run date can be completed later if you are mailing out periodicals and want to keep a record of when the mailing list was created.
- *Save & Close* and then repeat the process for any planned future issues
- If you have not set up pricing yet for your Subscription product, please see the Pricing section for the next steps.

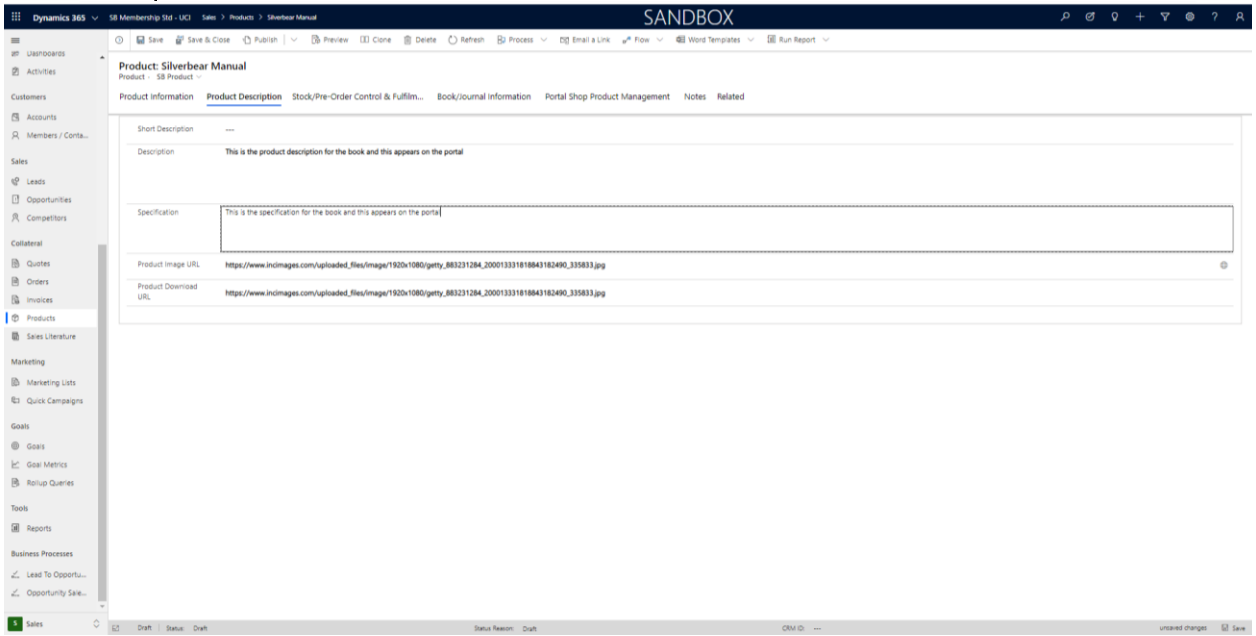


1.6. Purchased Products (one off goods and services)

Purchased products do not have durations. They are usually one-off products such as books and guides, but also can be professional services (e.g. a coaching session). There are lots of optional fields in the product setup screens, mainly concerning stock control and publication information; to what degree you use these depends on how your organisation works in terms of maintaining and monitoring stock levels and records.

- Create your basic product details but choose **Purchased Product** for *Product Type*. Additional fields/tabs should open, including *Book/Journal Information*.
- If you are planning to sell this product on the Portal go to *Product Description* and complete the *Description*
- On this screen you can also include a *Product Image URL* to appear on the portal – this is a link to an image of your product online. You can store images on your Silverbear portal

- If this is a downloadable product (e.g., a guide on a pdf, or a mp4 you can include the link for the product.

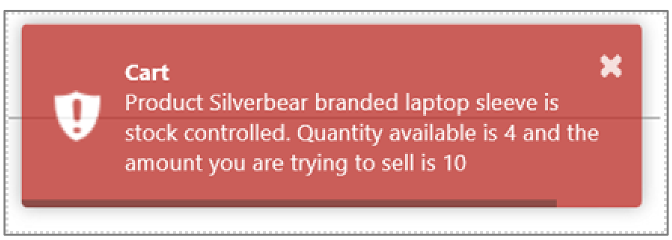


- Next click on the *Stock/Pre Order Control & Fulfilment* section. Much of this is optional but using the fields will prevent the sale of out-of-stock items. Please see below for a guide on the different fields.

Under Stock Control	-	If you wish to add stock control, select Yes. This will ensure that alerts appear if items are out of stock.
Stock Quantity for Sale	-	Your starting stock levels. As orders are taken this value will decrease. When new stock arrives, this total needs to be increased by the number of new stocks
Requires Stock Alert	-	A yes/no option with the default setting being No. Change this to Yes if you would like an automated communication when stock levels are low.
Stock Administrator	-	The CRM user that will receive the automated communications when stock levels are low.
Stock Quantity Alert	-	The stock administrator will receive notification when stocks reach this level.
Stock Supplier	-	For record keeping – if your supplier has been set up as an organisation in your CRM you can choose them here.
Available for Pre-Order?	-	If left as no, you will not be able sell any more items than are available (as indicated by the Stock Quantity for Sale field). Change this to Yes if you would like to allow orders of greater value than are physically available.

Pre-Order Limit	-	A numeric value which indicates how many items can be ordered in excess of the Stock Quantity for Sale field.
Estimated Delivery	-	A text field which allows you to enter data which indicates how long it takes to receive stock from your stock supplier. For your internal use.
Requires Fulfilment	-	Indicates if this product requires fulfilment, this can be used in an Advanced Find/View to produce lists of items which need to be shipped
Fulfilment Administrator	-	Indicates the CRM user that is responsible for the fulfilment of this product, this can be used in a view created for fulfilment purposes
Fulfilment Supplier	-	Choose an organisation which has been created in CRM to indicate they are the company which fulfils your stock needs. This could be the same organisation as the stock supplier or a different organisation.
Minimum Quantity Restriction	-	The minimum quantity for an order to be placed. Note that this only works for portal sales
Maximum Quantity Restriction	-	The Maximum quantity accepted for an order. Note this is required for portal sales. Does not affect the Cart

- When you purchase a stock-controlled product which has insufficient stock via the Cart, you will see an error message when you attempt to *Checkout.*

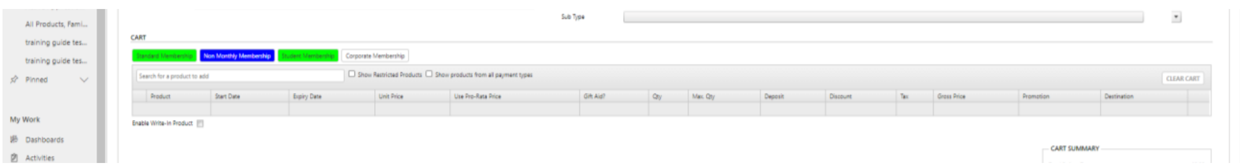


- For Books there are further fields on the tab *Book/Journal Information* which by default are for information only, unless you have customised web design to include them
- Once you have entered all the relevant information for your product press *Save.*
- You will then be prompted to choose a *Default Price List*. Choose your standard default price list (likely to be called something like “Price List (current year)”. You may need to change the view in order to select this price list

- If your Silverbear CRM is not set to auto publish (you will see a message if auto publish IS enabled, you will need to press *Publish* on the Command Bar.
- The next step is to set the pricing for your product. Products cannot be sold through the Cart or the CRM unless they are visible on at least one price list.

1.7. Quick Add Products (Favourites)

The Quick Add Product facility allows you to create some shortcut buttons above the bottom Cart section, so that you can choose those rather than searching for regularly sold products each time you use the Cart. Different team members and/or teams can have different Quick Add Products. For example, the Membership team would see the Membership products, a Sales or Customer Services team might instead have Purchased Products.



- Open the Product for which you would like a shortcut, and press *Related* and then *Quick-Add Products.*
- *Press +New Quick Add Product and* complete the form using the guide below

Name	-	The name as it will display on the Quick-Add area of the CART. This can be the internal name used for the product.
Product	-	The associated product that will be added to the CART when using the Quick-Add button. Do not change this field
User	-	The user who will see this Quick-Add product. <u>If empty, the Team field is mandatory as you need to select either an individual user or a Team.</u>
Order	-	An optional field. Defines the sequence in which the buttons appear. If not populated will simply add the buttons in the order, they are created.
CSS Class	-	Used to enter a colour that you'd like the Quick-Add product button to appear as (otherwise it will be left as white). When adding a colour name, you will need to choose from the following list exactly as shown below (no capitals / punctuation).

		Colours available are silver, grey, black, red, maroon, yellow, olive, lime, green, aqua, teal, blue, navy, fuchsia, purple.
Team	-	The team that will see this Quick-Add product. <u>If empty, the User field is mandatory</u>

- Once you have completed the Quick-Add product setup, click on the *Save & Close* button
- You can then repeat the process for other users or teams
- Please note that you may need to refresh your browser and/or there may be delay before you see the new button(s) as the Cart updates

2. Pricing

There are many elements to pricing on Silverbear.

- All products that you sell through the portal or your CRM need to appear on at least one Price List, however the standard practice is to have Price Lists covering different periods, e.g. a 2020 Price List and a 2021 Price List to ensure accurate renewal pricing information. After these Price Lists are created, products can be added to them with the correct price attached. Price Lists are covered in the next section
- You can also have different Prices for different currencies
- Membership may give preferential prices; you can have separate prices lists for members or other select groups
- Discounts can be applied on the CRM or on the Portal using discount codes.
- Products can be sold as packages, giving a fixed price for a bundle of goods.
- Memberships and subscriptions can be paid for in instalments; a separate monthly price can be set for these products

The next section covers creating Price Lists. If you are confident that Price Lists have already been set up for your product you can skip the sections on creating Price Lists and go straight to the section on "Adding a new product to a price list"

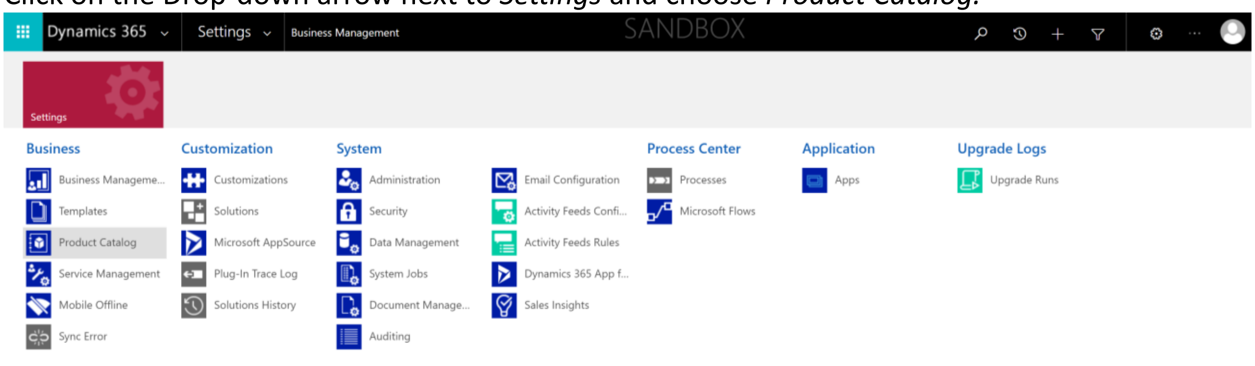
2.1. Viewing existing price lists

After the recent upgrade to the Unified Client Interface, functions to create and edit price lists, have not by default been included in the new UCI menus (in other words they may not be included in your menu choices in your left hand navigation bar). Instead they are accessed through the Advanced Settings. However, you should be able to add products to existing price lists through the standard navigation. If your

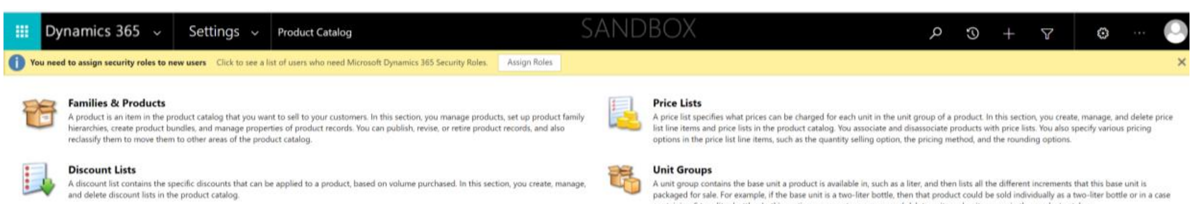
Silverbear environment does have Price Lists as an option on your left-hand Navigation Bar, then please use this option. In the steps that follow if you are asked to click on a drop-down arrow on the top bar, instead look for the same option but under the *Related* Tab.

- Click on the Settings icon (the cog) on the Top Menu Bar and choose *Advanced Settings*

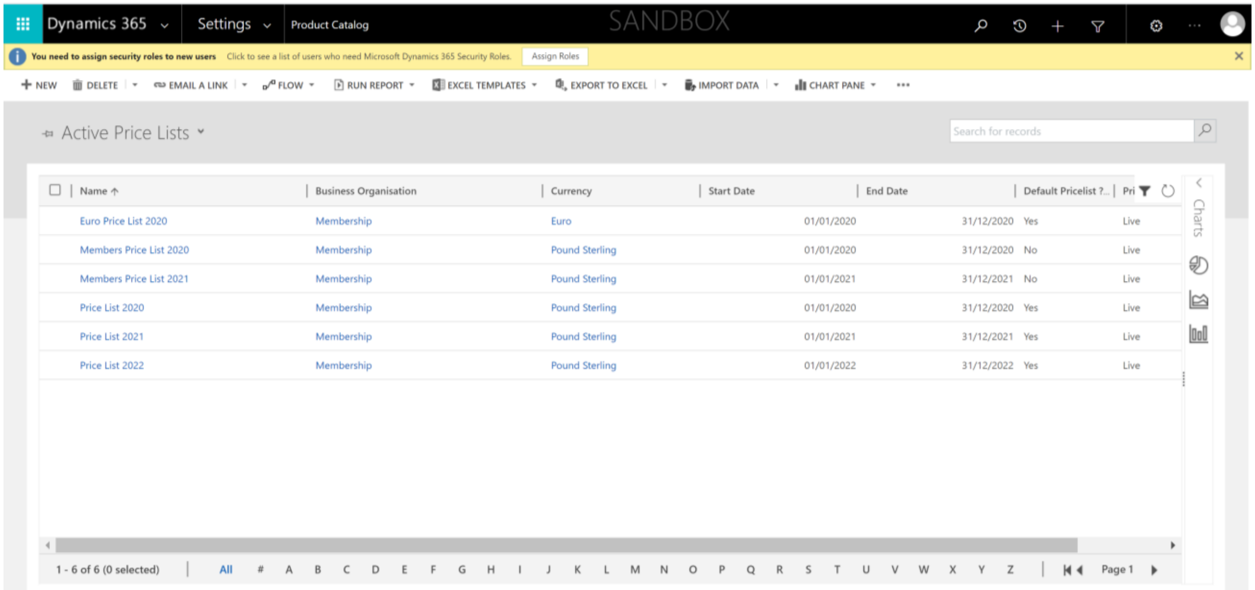
- Click on the Drop-down arrow next to *Settings* and choose *Product Catalog.*



- Select the *Price Lists* icon



- Your existing Price Lists will be displayed. These are your menus of goods and services for particular periods/customer types/currencies. If you have created a new product and you can see that all the price lists you need have already been created, you can go to the section on adding products to a price list. Otherwise follow the steps to add a new price list



2.2. Creating a new Price List.

You will need to create new Price Lists if you:

- Do not have one set up for the following year (we recommend you have one or two years set up ahead of the year/period you are in for membership renewal pricing
- Do not have a price list for the currency you are trying to sell in
- Want to create a new set of prices based on a customer's relationship with your organisation (e.g. a discounted list for members or other stakeholders).

The following section describes how to create a new price list from scratch. It may be quicker to clone an existing price list (particularly useful if you are creating price lists for future periods based on an established list which has already been set up). If so, please go to the "Clone A Price List" section.

- To manually create a brand-new list, press + *New* on the Command Bar
- Complete the *Name* of your Price list (something that will be easy to understand when you are setting prices for products).
- The Default Pricelist should be set at *Yes if <u>this is the standard default price list for the period it runs for and this currency and this business organisation</u>*. If it is a price list which is only available to selected user roles (e.g. members), you should set it as default = No.
- Unless for some reason you want to leave the price list in a draft state (perhaps it is for a new global region that you are not yet working in, or a new type of member price offering that you haven't launched yet) then the *Status* should be

set to **Live.** This is the case even if the price list is for a future year, as it will be used to calculate renewal prices and create PM Opportunities. If a Price List is left in **Draft** *Status,* then it will not be used in the Cart, the portal or for creating PM Opportunities. Further details on how to attach user roles e.g. "Member" to a price list are covered later in this Module

- Define the *Start Date* and *End Date* for this list
- Set the *Currency* if it is different to your default currency. In the example below we have created a new Euro currency price list for the year 2021. Please note that currencies will only be able to be set for price lists if that currency already exists in your CRM. If you need to add a new currency this can be done by pressing +New when looking for the currency in the currency field
- Choose the relevant *Business Organisation*
- Press *Save*
- If you now want to add existing product to this list, you can follow the steps in the next section. If you want to do this later, or if you need to add/edit your products first, you can do this through the product setup instead, please see the second part of the Adding Products to Price Lists section

2.3. Adding Products to Price Lists

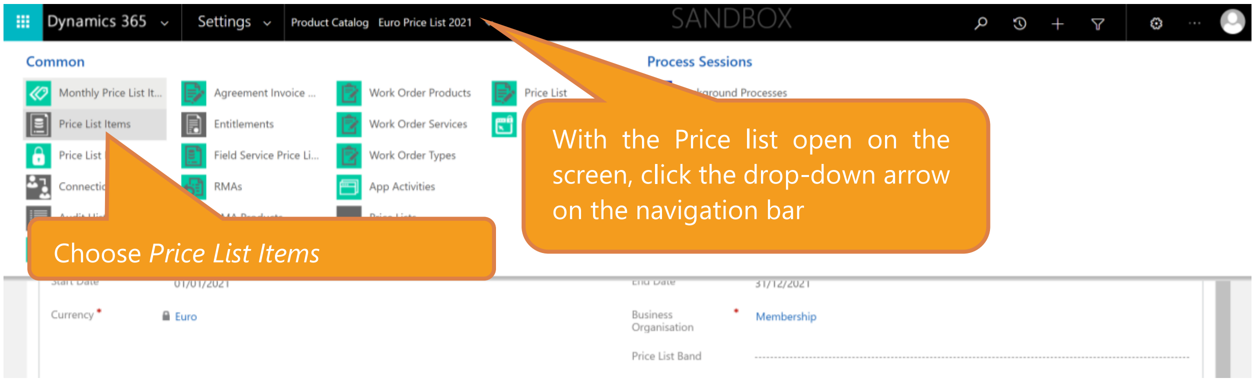
A price list without any products attached is basically a blank menu; you will need to add the relevant products to it so that you can sell those items in the Cart and through your Portal. There are two starting points for adding products to Price Lists.

- From the Price List screen
- From the Product Setup.

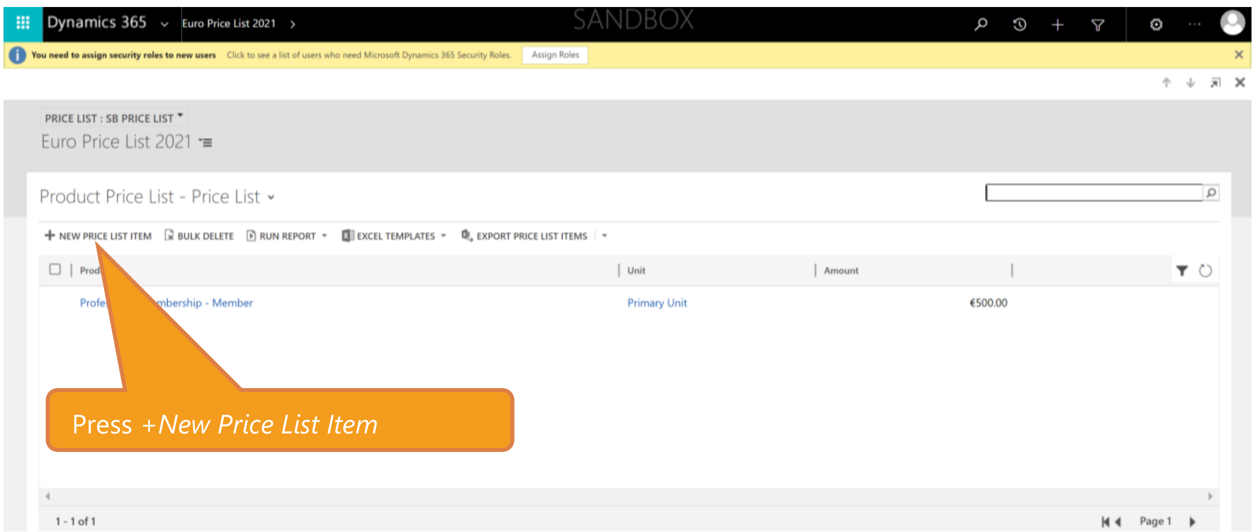
Both have the same result; it often just depends on your starting point as to which is more efficient

Adding products to a price list from the Price List screen

- With the price list you are adding to on the screen, press the drop-down arrow next to the name of your Price List and choose *Price List Items*



- If this is a price list you are editing or adding to then there may be some products attached already and these will be displayed, on the example below there is already a Professional Membership product on this list
- Press +*New Price List Item*



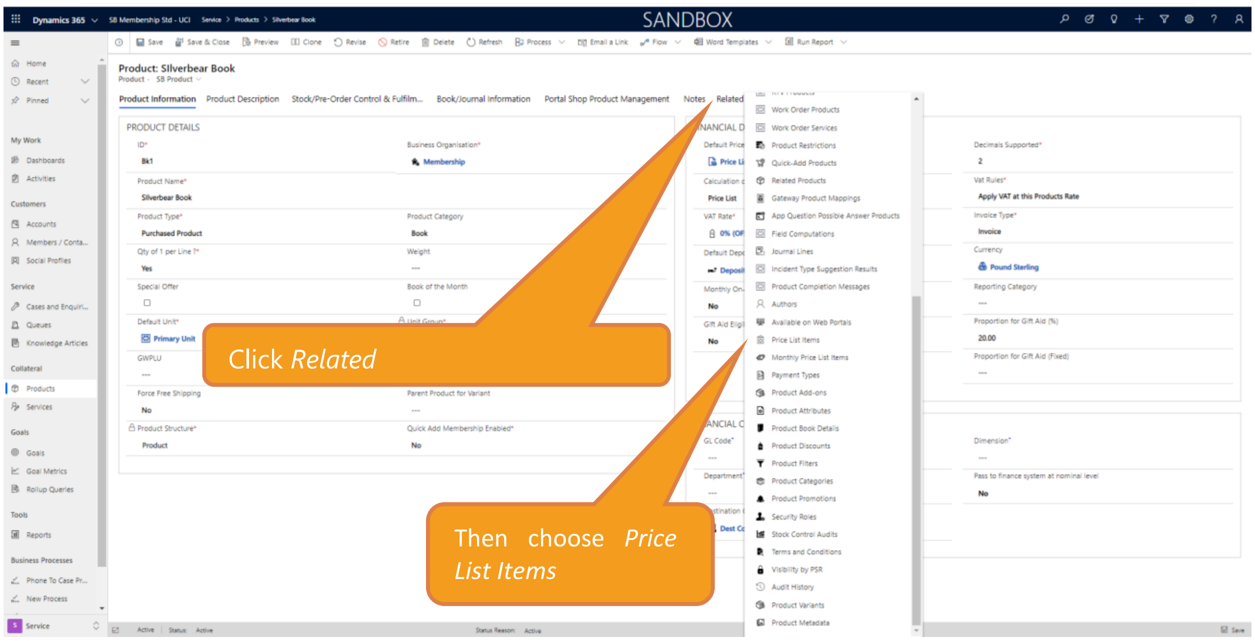
- You should then find yourself in a standard UCI form.
- Select a product to appear in the *Product* field (you can only add one product at a time to the list so you will need to repeat this process for the other products you offer)
- Set the ***Unit*** field, normally to Primary Unit. However, if you sell products in different types of units, e.g. cases or boxes you may need to choose a different option
- Set the price for this product (for that period and currency and price list type) in the *Amount* box. This should be the price exclusive of VAT if VAT is being charged for this product
- Click on the *Save & Close* button on the Command Bar

- Repeat this process for the other products which should appear on this price list

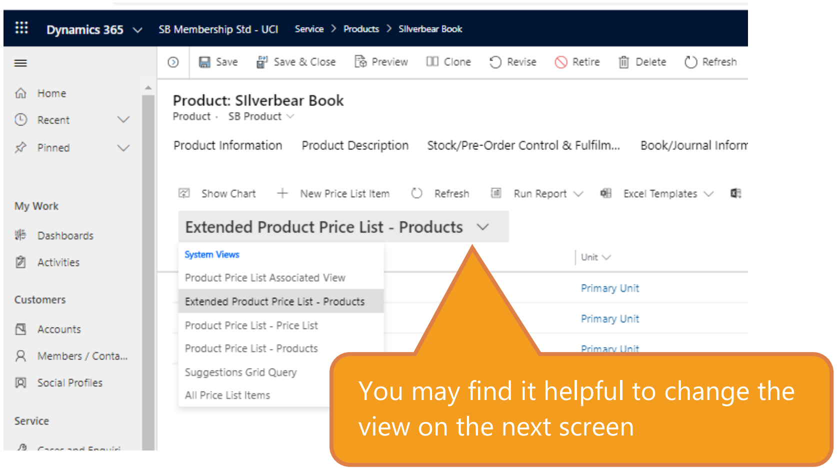
2.4. Adding products to a price list from the Product Setup Screen

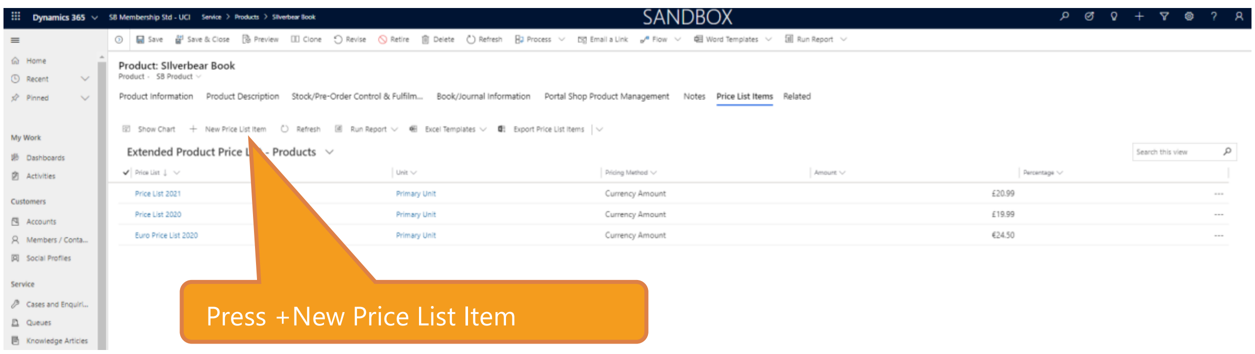
If you have established Price Lists but have created a new product and just need to set up the prices for it, it may be easier to do this from the product setup screen.

- Go to the *Products* menu option (normally found in the *Service* Work Area) and click on or create your product
- Click *Related* and then choose *Price List Items*

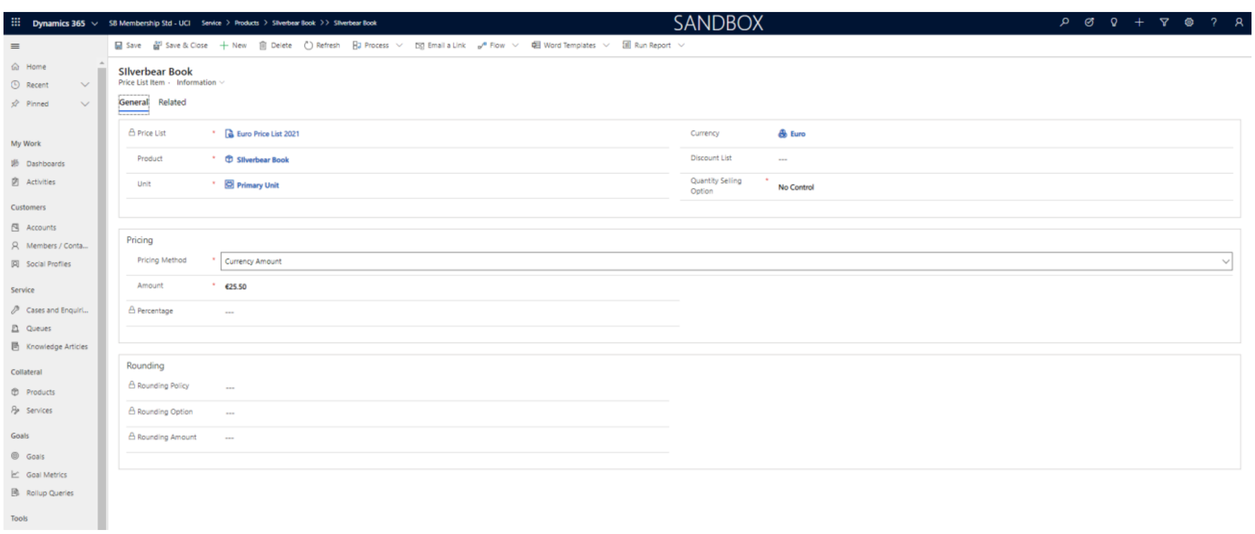


- If this product already appears on any price lists, the entries will be displayed. On the example below the view was changed to Extended Product Price list – Products so that the details of those price list entries would be shown





- Press +*New Price List Item*
- Now select the Price List to add this product to, in this case the Euro 2021 price list, and define the price



- Press *Save & Close* and then repeat the process to add this product onto any further lists

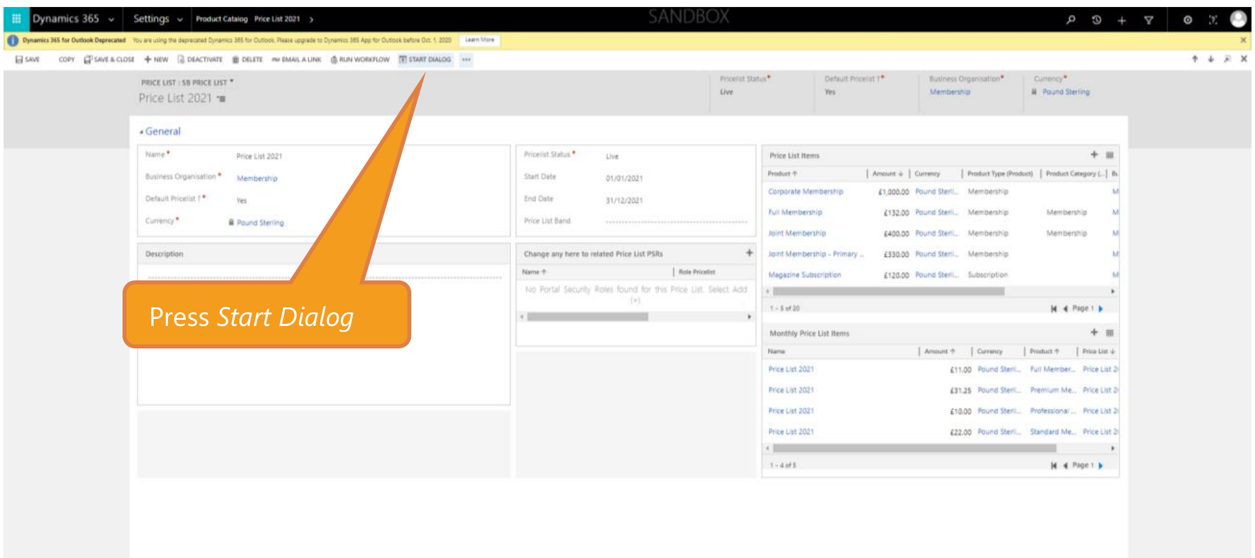
2.5. Changing price list entries

- If a price that is already set on a price list has changed, then follow either of the processes above to access the prices on a price list – or the prices that a product has set up for it– and then click through to them and update the price.

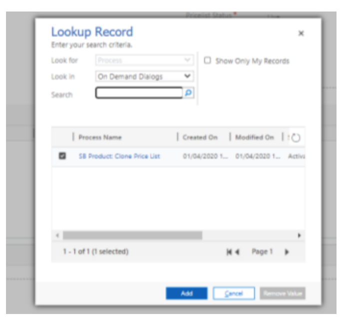
2.6. Cloning Price Lists

The PM Opportunity process demands that there are prices for both the current and the subsequent year to be set up for any renewable products. Therefore, you should have at least two versions of your price lists on your Silverbear system, this year and the next. If you have established a price list and added all your products to it, it can be much quicker to just clone and edit this list rather than starting anew

- Open the price list you would like to Clone

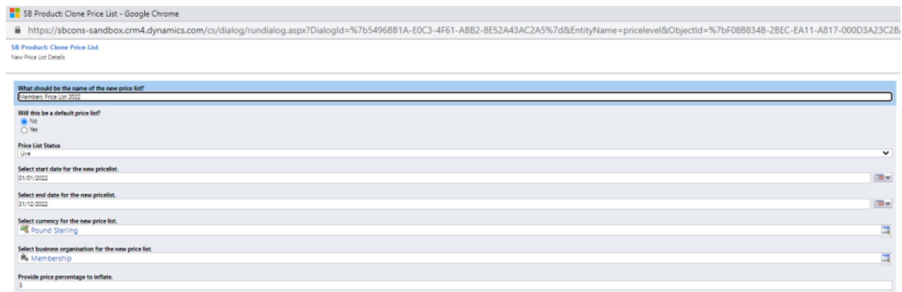


- Press *Start Dialog*



- Check that the process name **Clone Price List** is selected and choose *Add*
- A pop-up form should appear, work through this list – this is a similar form to the one you use to create a price list from scratch. If you are creating a future version of a default list, then change Default Price List to Yes.

- If you are happy to have these prices accessible in the cart/portal/for renewal purposes then make the List **Live** so that those prices can be used for renewal purposes.
- The unique field on this form is the *Provide Price Percentage to Inflate* field. This will allow you to instantly update all the prices for this future list by a percentage – to save you needing to edit them yourself. This is optional; if you don't enter a number then the existing prices will be replicated on the new list



- Press *Next* and then *Finish* when the confirmation message appears
- The Price list will now appear in your list of available price lists. If you have increased your prices by a percentage you may need to edit some for rounding purposes; if you have not increased your prices automatically then at some point you will need to change these, particularly if the start of that period is approaching for renewal purposes. Please see the Price List and PM Opportunity refresh section for more information

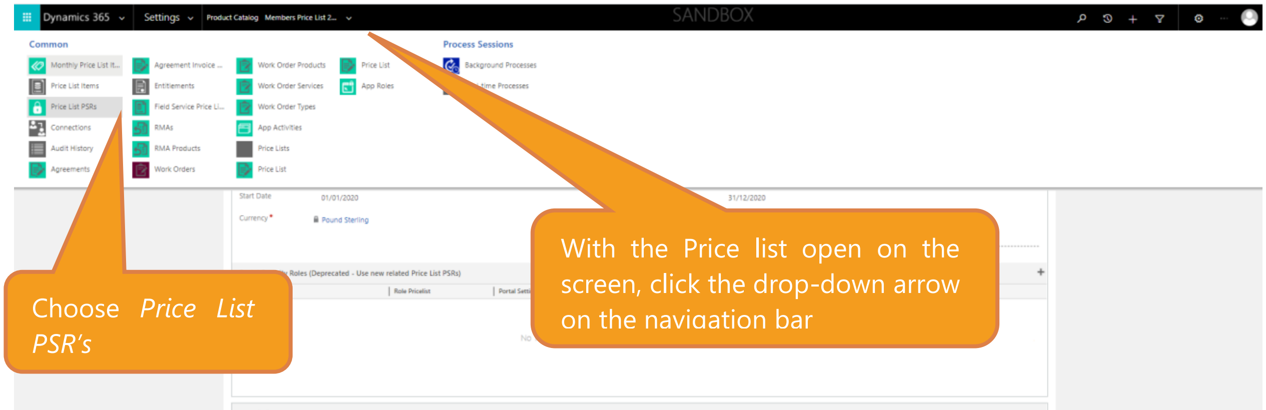
2.7. Members only (or other user type) price lists

Many organisations offer selected products at a reduced rate for members. For example, they might have a member price for their in-house magazine or for professional coaching. Please note that members pricing for events is set up in the Events system and is covered in the Events Modules.

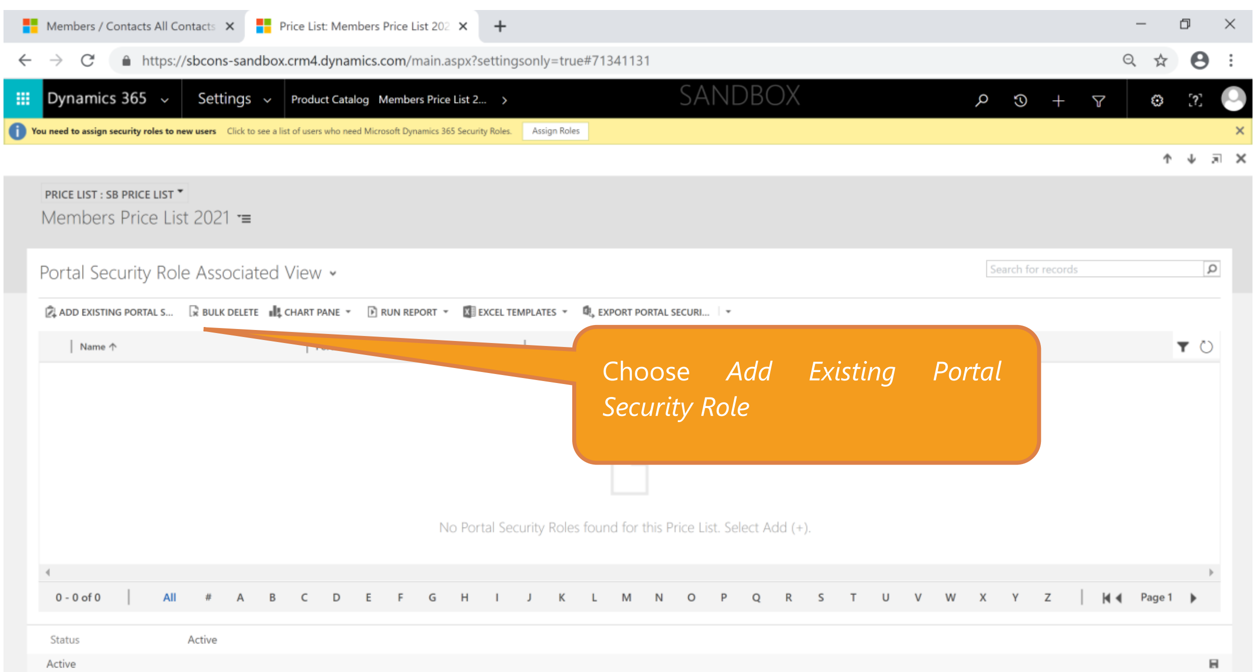
In addition to a separate Members price list you could also have other price lists for other types of customers and stakeholders, for example Trustees, lifetime members, students etc. These specific exclusive prices list work with the Portal Security Roles which are normally created and defined on your system through consultation with Silverbear. By default, price lists are available to all users unless you specify at least one role they are valid for. In the example below, we have a Portal Security Role named Member and we have created a Members price list which we are going to link to that Role.

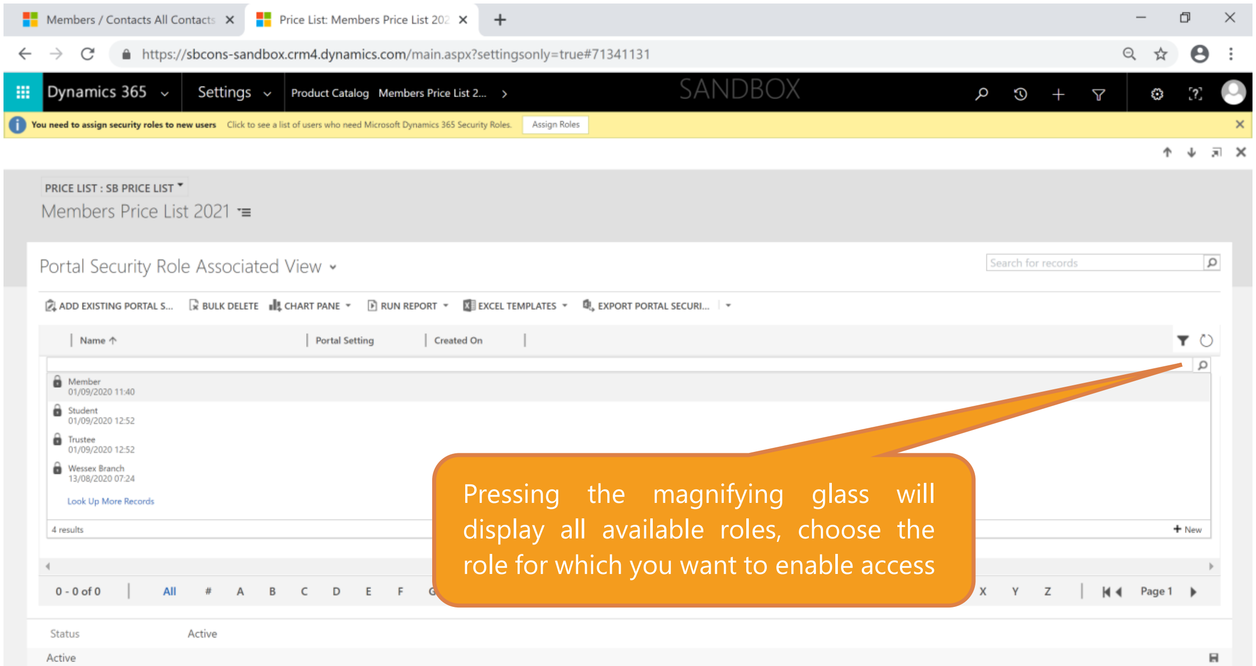
- Access the *Price List* and then click on the drop-down arrow next to the name of that list on the top navigation bar.

- Choose *Price List PSRS*. (If your Price List menu option appears in the standard UCI navigation, you should be able to click *Related* and then *Price List PSR's* instead)

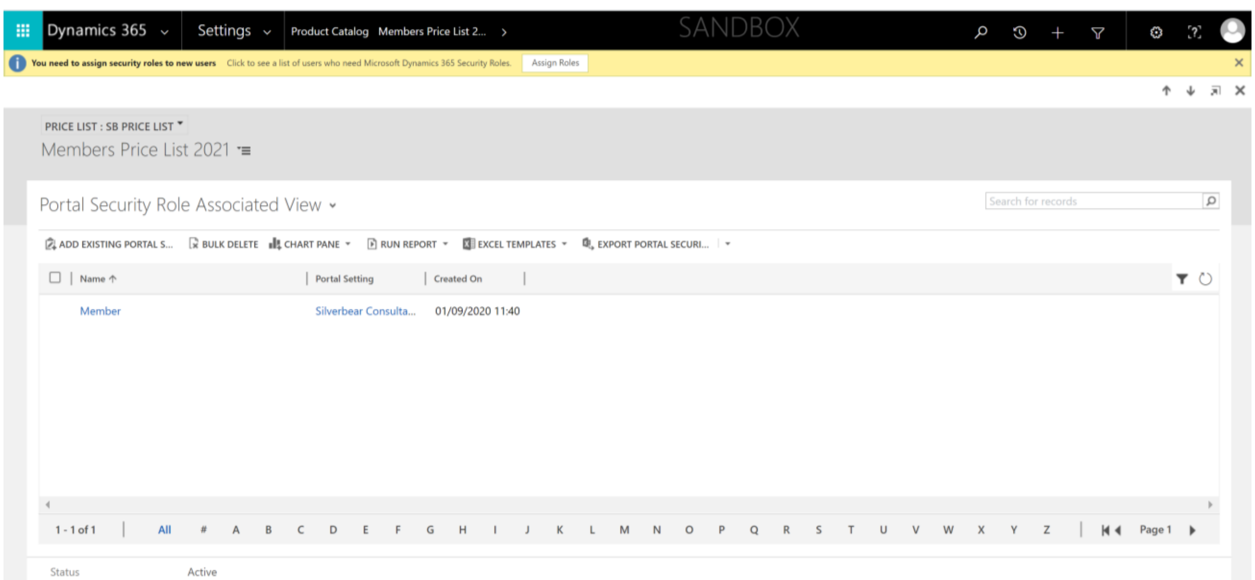


- If this list already has any security roles attached to it, they will be listed. If there are no roles listed, then this price list (if made default) would be available to everyone
- To add a security role to this list, press +*Existing Portal Security Role*
- Press the Magnifying glass at the end of the first line and choose the relevant role. If you cannot see a suitable security role then please consult your Systems Administrator or Silverbear





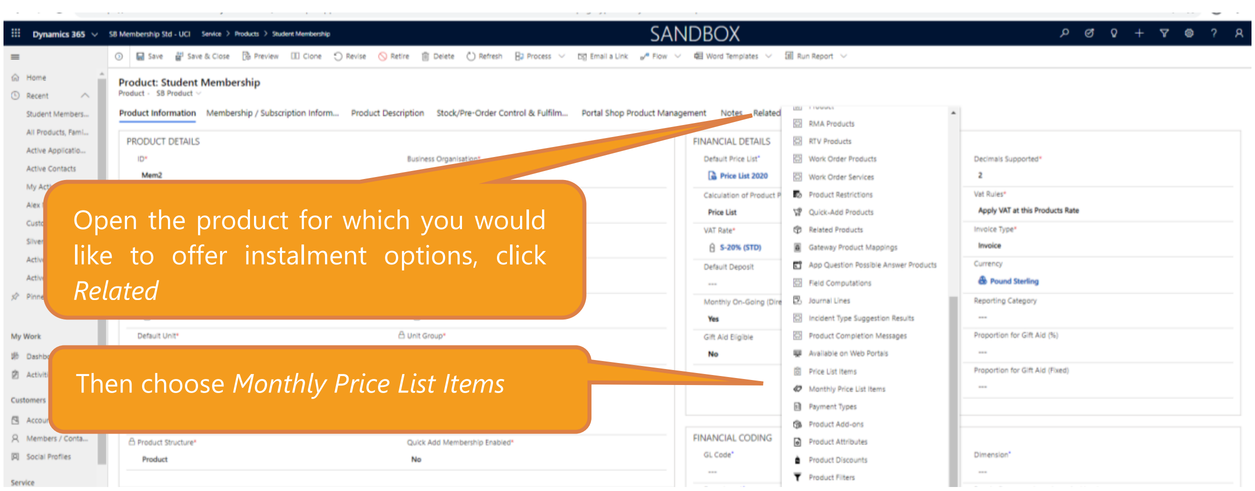
- Click on the *Role*. You can also add further roles to this price list. For example, for a VIP price list with heavily discounted/free products you might want to add several different roles such as Staff, Lifetime Member and Patron (if you have such roles set up)
- Press the *Save* icon in the bottom right hand corner, this price list is now restricted to users with the Member security role



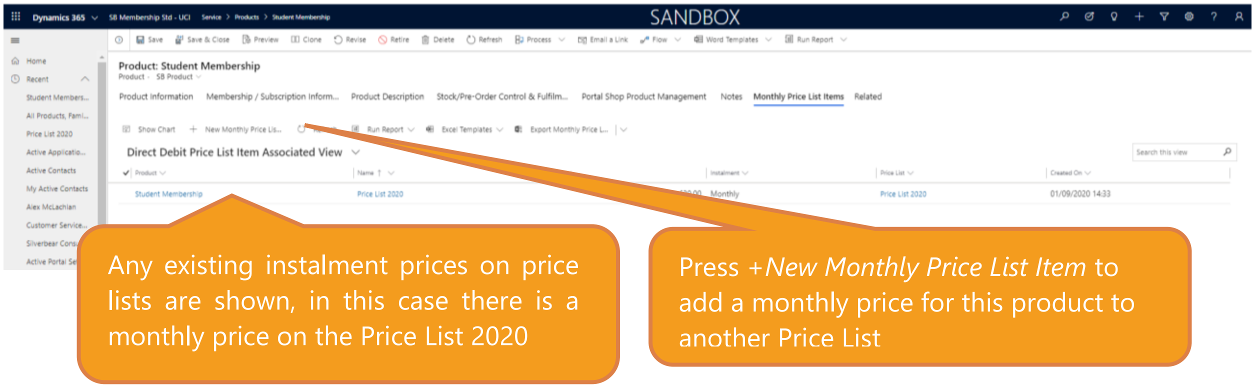
- We recommend that you check the pricing by using an appropriate test account (e.g. a member) in the *Cart*. If you are doing this in your Live system, then you can start the transaction in the Cart but not finish it. For online sales, you should start the purchase process with an appropriate test account in the portal to check the prices

2.8. Payment by Instalments

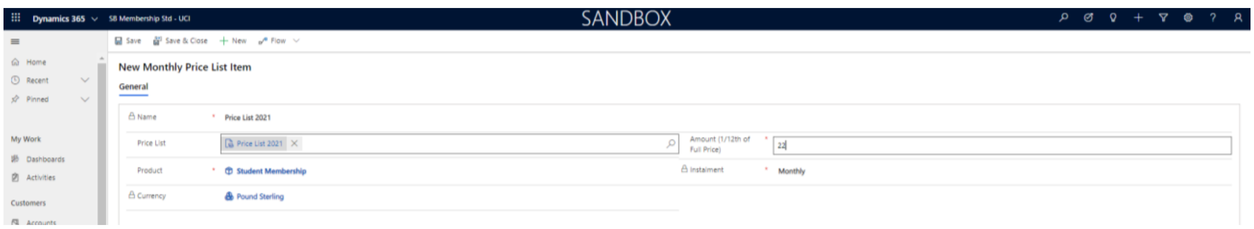
- Your organisation may offer your clients the choice of payment by monthly instalments for some products, normally for payment by Direct Debit
- Access the product for which you would like to offer this option.
- The only change you potentially may need to make on the product setup screen itself is the *Monthly Ongoing Rows, Direct Debit only*. This field affects the creation of Direct Debit collection lines after the product duration has finished. If ticked then rather than renewing the product after the end of the initial term, you continue to create Direct Debit Collection lines (continue taking monthly payments) through the use of the a semi-manual process in the Direct Debit Tool, effectively managing a rolling monthly contract. This process is described in the Finance Direct Debit Module. Please check with your Systems Administrator or finance department if you are unsure of whether to tick this box as in most cases it would not be used.
- Regardless of whether you clicked that field or not, next click on the *Related* tab and then *Monthly Price List items*



- You should now see a list of any existing monthly prices which have been added to Price Lists for this product. You might want to change the view to one that shows you the detail of these entries as below:
- In this next stage you will be adding a monthly price to existing Price Lists. (you do not need to create new Price Lists for these monthly instalments). If you offer payment by instalments, then you should always have prices added to the current year's Price List(s) and the next one(s).
- Press +*New Monthly Price List Item*



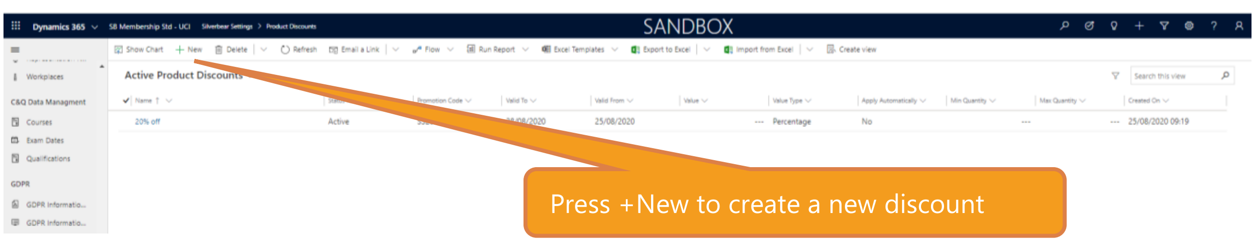
- In the *Price List* field choose the first price list you need to add this monthly price to
- In the *Amount* box choose the monthly price for this product. It may be precisely 1/12th of the yearly price or the monthly price may be different (overall the price may end up higher or lower than the equivalent single annual payment).
- Press *Save & Close* and then repeat the process if necessary. (You should make sure this product and its price appears on your generic and any special exclusive lists as well as additional currency lists if required)



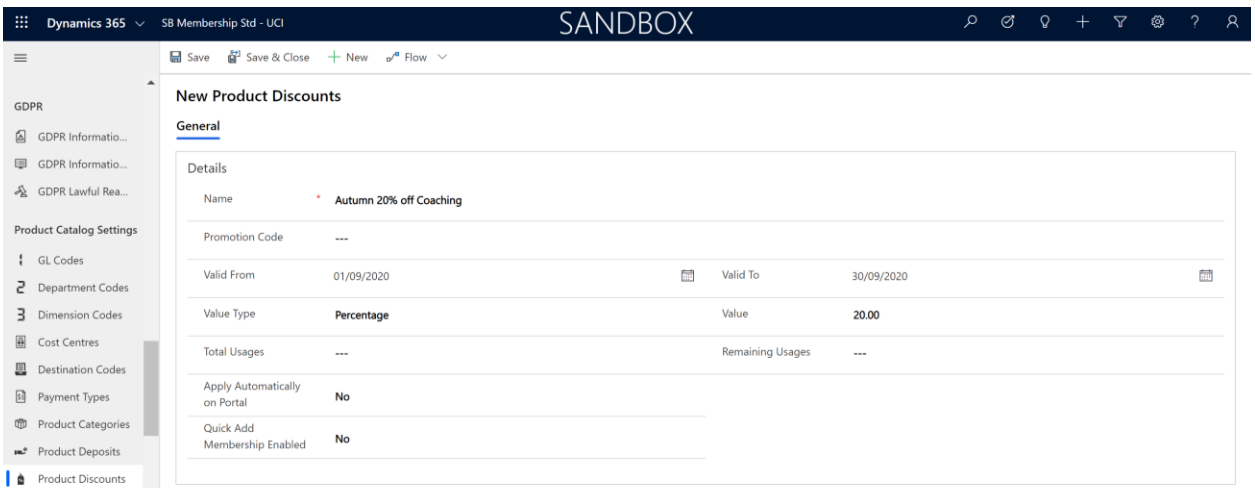
2.9. Discounts

A further way of varying the price of a products is with discounts which can be used by your team members in the CRM or by your customers on the portal. Discounts are created in your CRM and then are attached to the products you wish them to be used with. They can be removed at any time. A product can have various discounts enabled for it, but only one can be used with any given transaction.

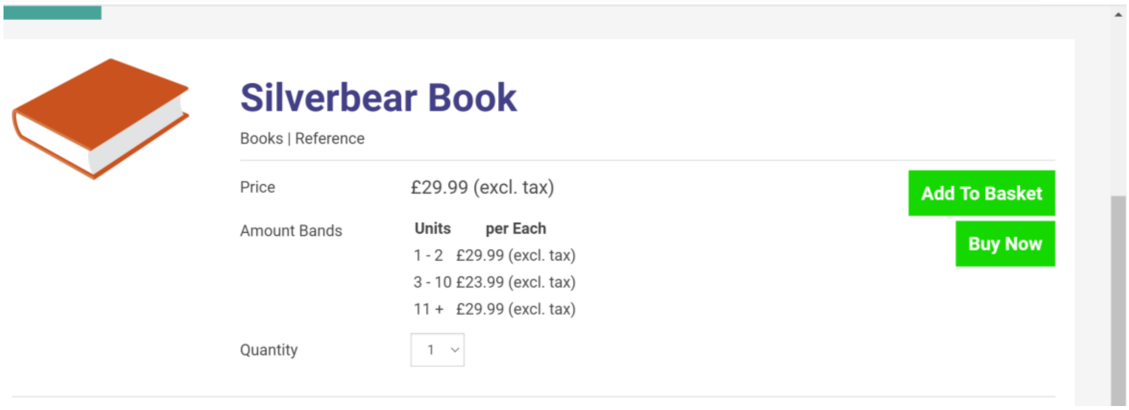
- To view your discounts and to create new ones, go to the *Silverbear Settings* Work Area and choose *Product Discounts*
- Click +*New* to create a new discount, or click on existing discounts to view or edit them



- Enter a *Name* and *Promotion Code* (if you are publishing this discount to clients or potential customers then the promotion code will need to be made public so it's helpful if it is easy to recognise)
- Enter a *Valid From* and *Valid To* date
- The *Value Type* can be a **percentage** discount, a set amount of money off (**discount**), or the discount can change the price to a new reduced rate **(Fixed)** e.g. £100 rather than £135
- After choosing the type, enter the appropriate amount in the *Value* box
- If you are restricting the number of times you want this discount to be used overall, enter an amount in the *Total Usages*. The *Remaining Usages* field will update as the discounts are redeemed



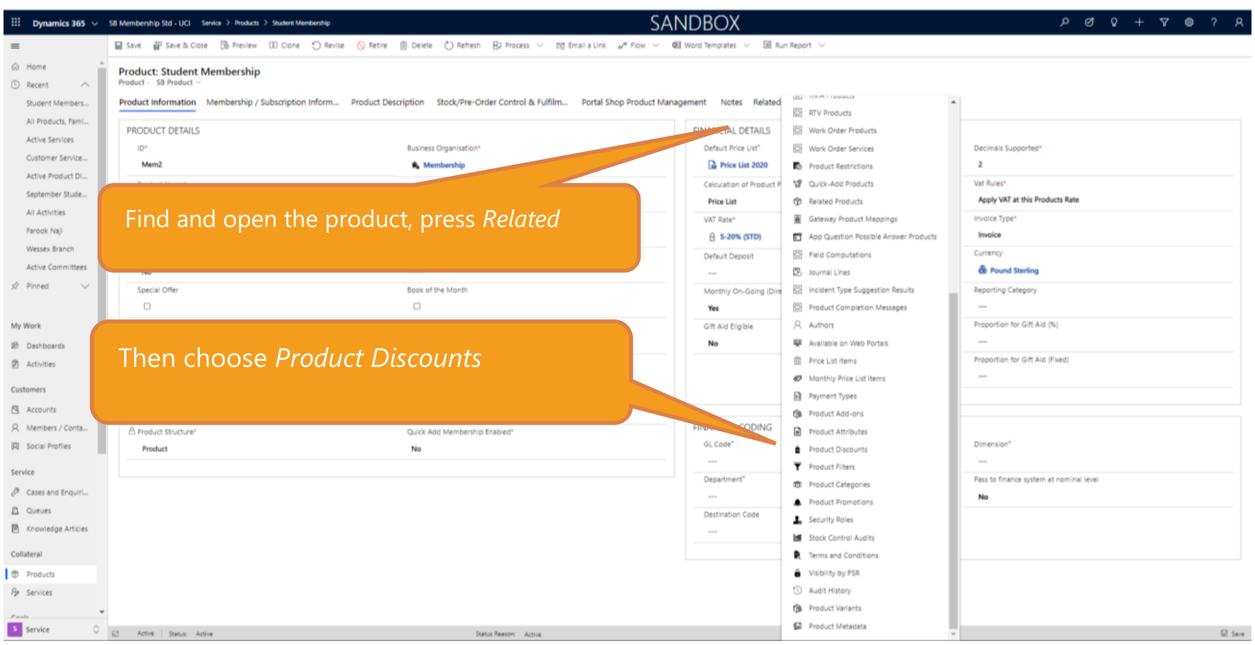
- *Apply Automatically On Portal* will mean that any portal sales of products which have this discount enabled will be automatically discounted. If you want to restrict your discount to certain groups e.g. to a mailing list or those responding to an advert, then do not tick this box. If *Apply Automatically* is ticked, then new fields will appear giving you the chance to specify a Maximum and Minimum quantity of the products which the discount will apply to. For example, if your offer was "get 10% off when you buy 5 or more books, discount can be used on up to 50 books", you would set the minimum quantity to 5 and the maximum to 50. In the example below an automatically applied discount was set with a minimum of 3 and the maximum 10



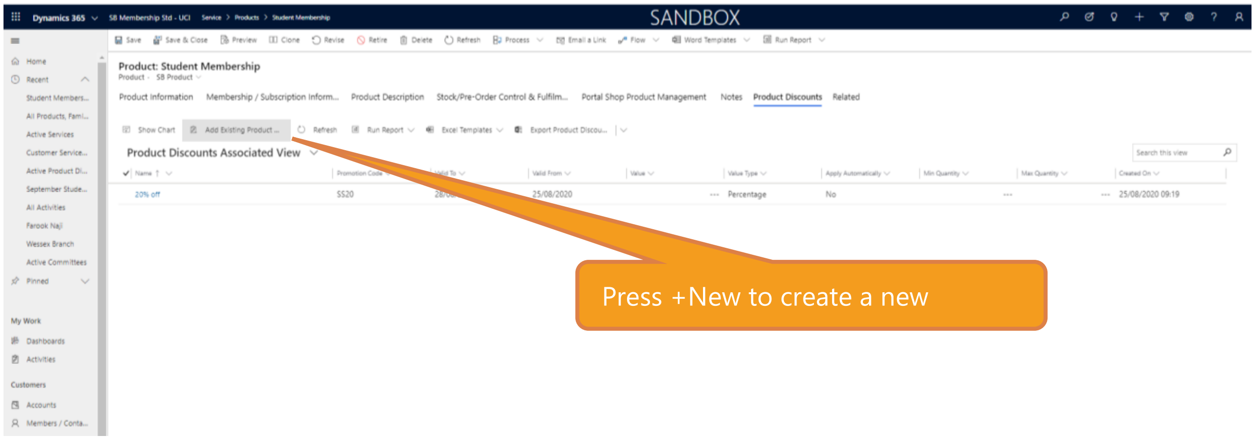
- Press *Save & Close* and continue for any further discounts

2.10. Enabling a discount for a product

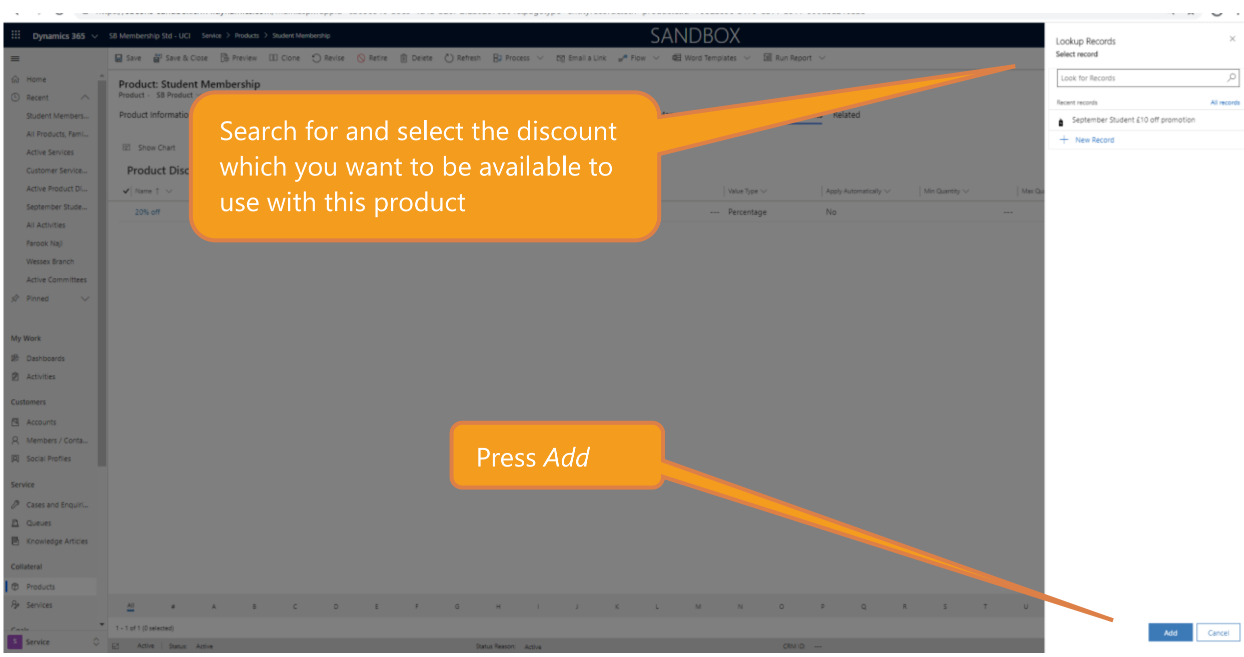
- To enable the use of a discount or discounts for a product, go to the *Product* Menu option and find the product. Click on *Related* and then *Product Discounts*.



- Any discounts which have already been enabled for this product will be shown
- Press *Add Existing Product Discount*



- A search window should appear on the right-hand side of the screen. Use this to search for your discount. If you have recently added this discount it should appear in the Recent Records area.
- Click on the discount and press *Add*



- Repeat the process for any further discounts
- Press Save & Close
- We recommend that you check your discount by starting a sale in the CRM and/or portal and applying the discount in the Cart/entering the discount code online

3. Payment options

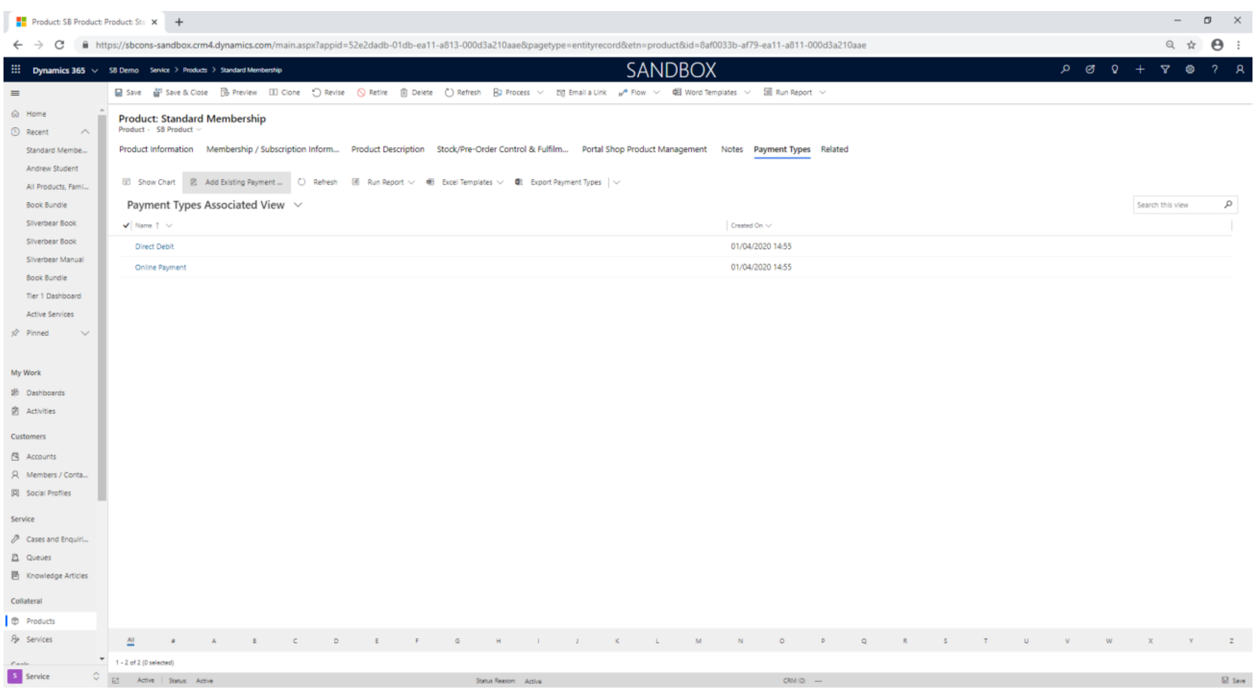
We have seen how the use of *Monthly Price List Items* allows you to enable monthly payments for a product. There are two other factors to consider regarding payment choices when creating products. Please note that in certain releases of Silverbear UCI payment type restriction will affect both the portal and CRM, but on other releases they will only affect Portal purchases. We recommend you check this functionality in UAT if you are making changes to your payment types.

- You can control the payment methods available for purchases.
- You can request a deposit at the time of purchase, with the balance to be settled later

3.1. Setting Payment Methods

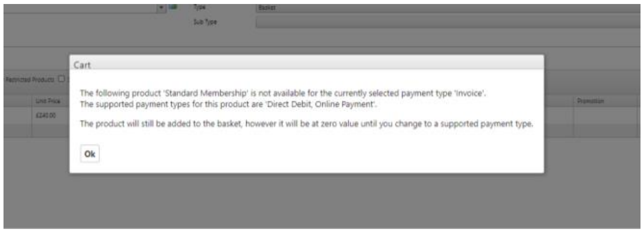
For some products you may want to restrict the payment options available (e.g. Direct Debit only, or Online payment only). If you don't restrict the payment method, then all available payment methods will be available by default.

- To do this, open the product and choose *Related* and then *Payment Types*
- Press *Add Existing Payment Type* and choose one of your payment options (e.g. Direct Debit)
- Repeat the process for any accepted payment types for that product
- Press *Save & Close*



- We recommend you check your product can be purchased by the methods you expect in both the Cart and the Portal once completed

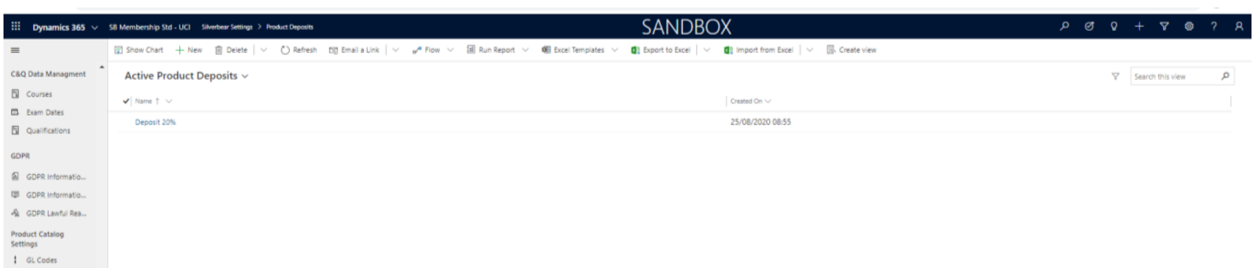
- If an invalid payment type is selected, you should see this message in the cart:



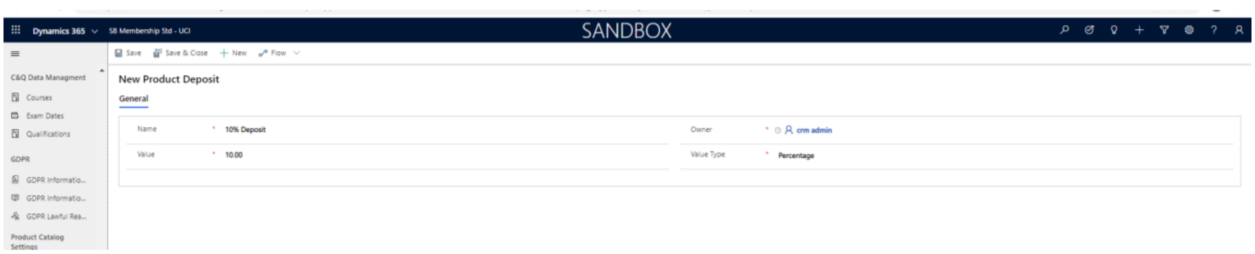
3.2. Deposits

For products where you are allowing payment later, you might want to request a deposit at the time of purchase, with the remaining amount then invoiced

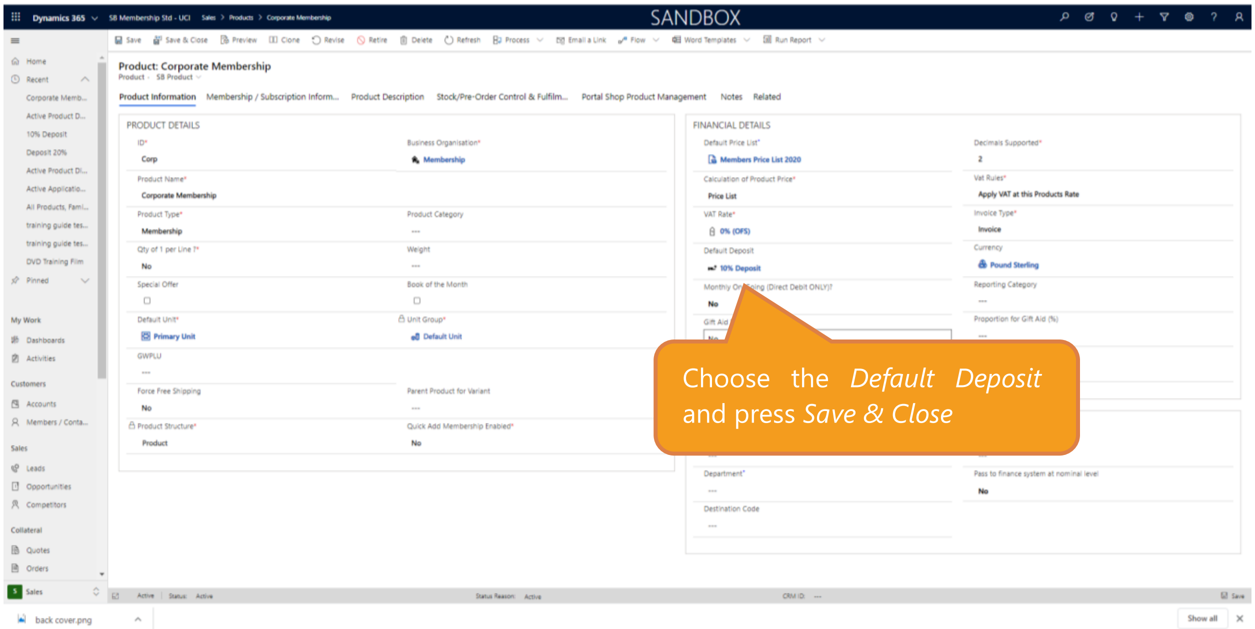
- To enable deposits, the accepted deposit percentages need to be created first, and then these can be enabled for suitable products
- Go to *Silverbear Settings* work area, and choose *Product Deposits*
- Click on +*New* to create a new Deposit percentage



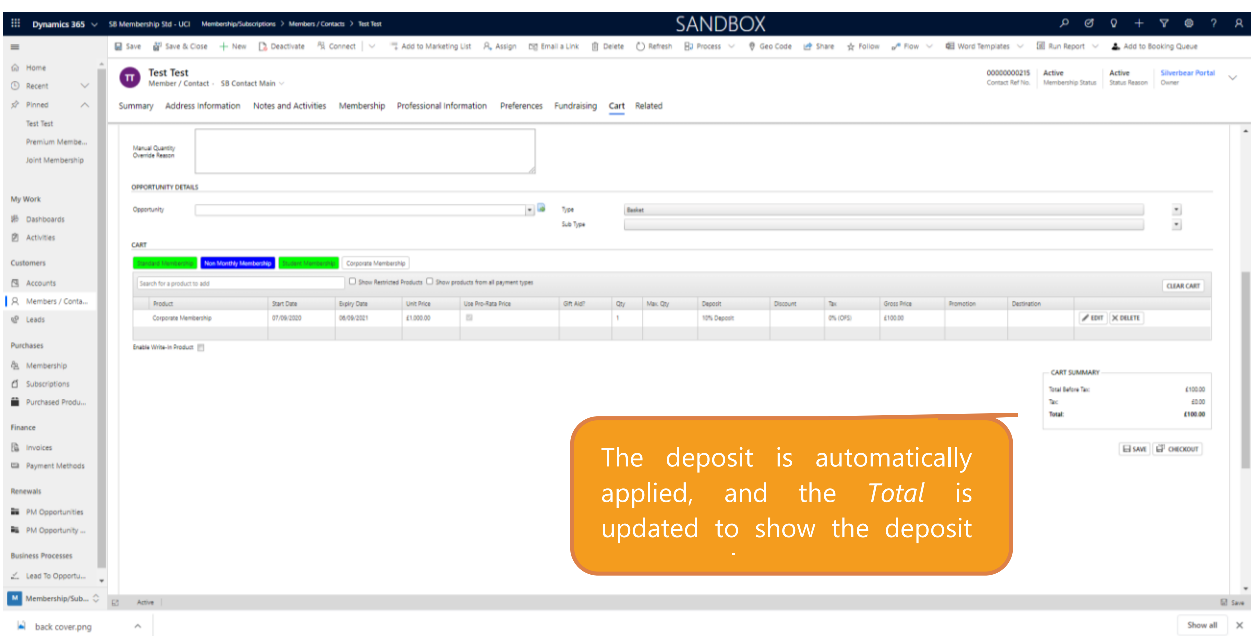
- Enter a suitable name and the deposit percentage
- Press *Save & Close*



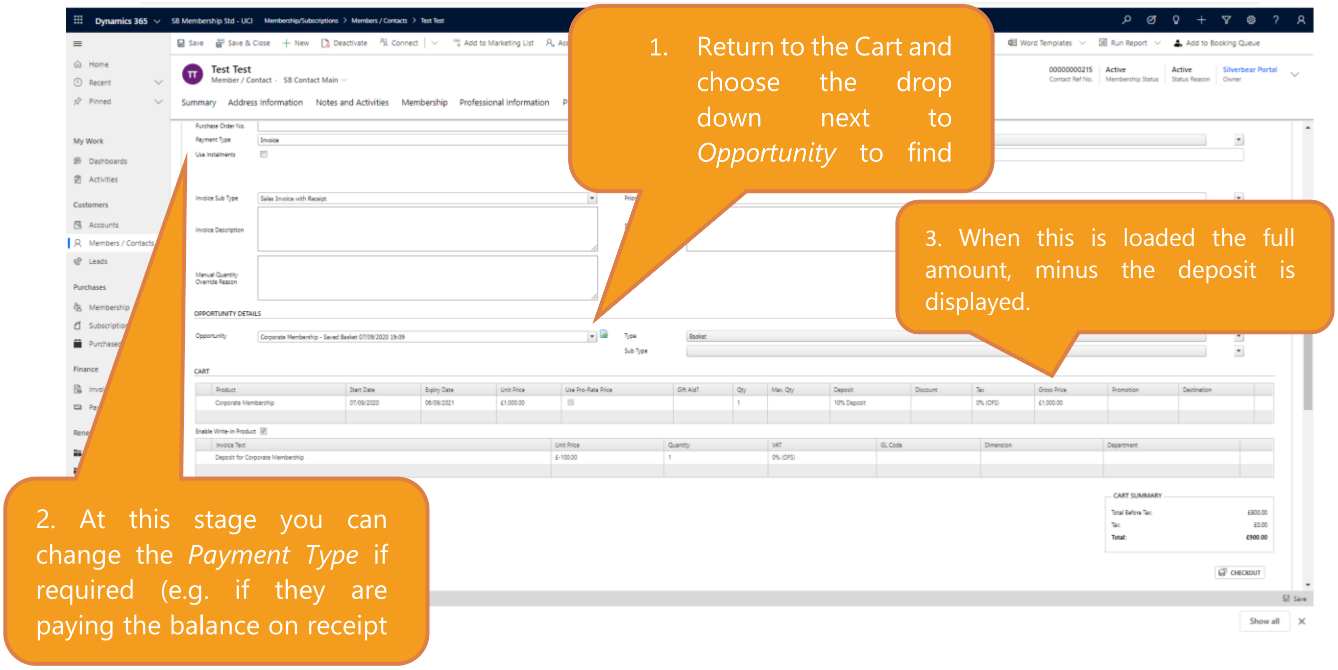
- Find and open a product for which you would like to take deposits
- Add the deposit in the Default Deposit field
- Press *Save & Close*



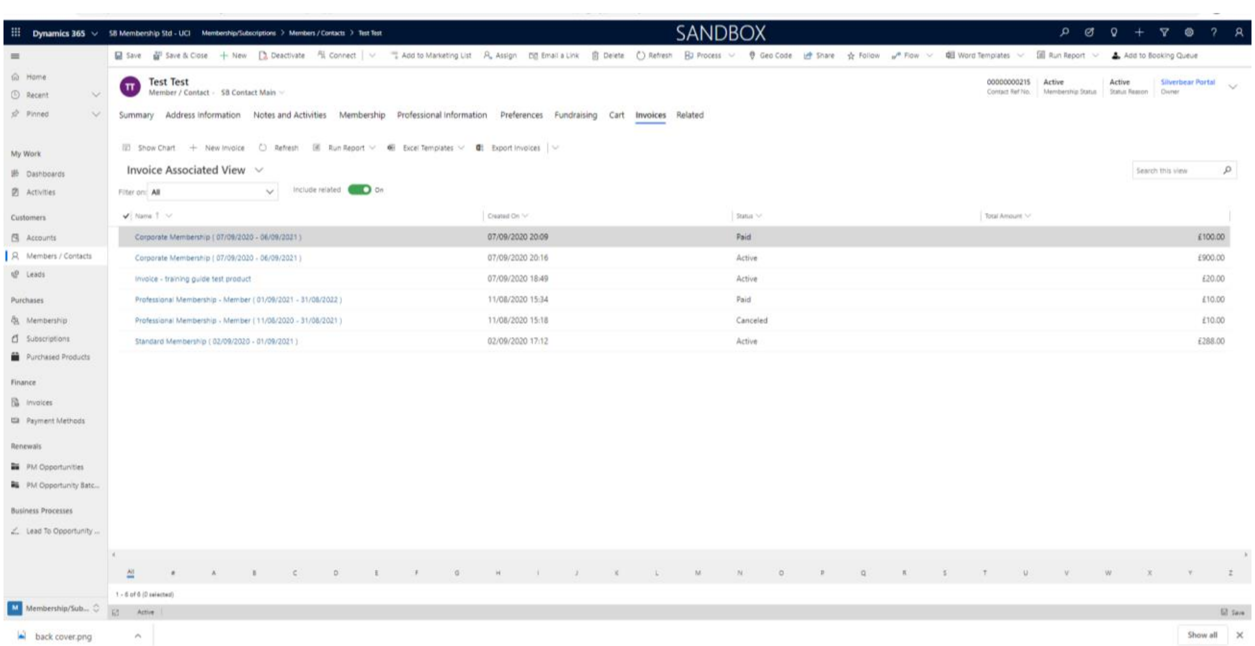
- In the Cart, the deposit will be automatically applied, and the Total will reflect the deposit amount only



- The remaining amount for this client is stored as a PM Opportunity. If you then wanted this to be payable by invoice, this can be loaded into the basket in the CART and the payment type changed to invoice (if you took the deposit by credit card)



- There will be two invoices for the purchase overall, one for the deposit and one for the balance.



4. Product Packages and multiple memberships

Products can be bundled together to create packages or multiple memberships A package is made up of a main product and then additional add on products. Some examples are as follows:

- A free book with every membership
- A package made up of a number of different products where the price changes if the numbers of those products increases
- A Joint membership giving two memberships for a cheaper price than if bought individually
- A Corporate membership which includes individual memberships for the company's staff members.

The first two options are covered in this section under product packages. The second two options require a process known as Draw-Down Memberships, and they are covered in a dedicated section

4.1. Product Packages

There are two pricing options with packages:

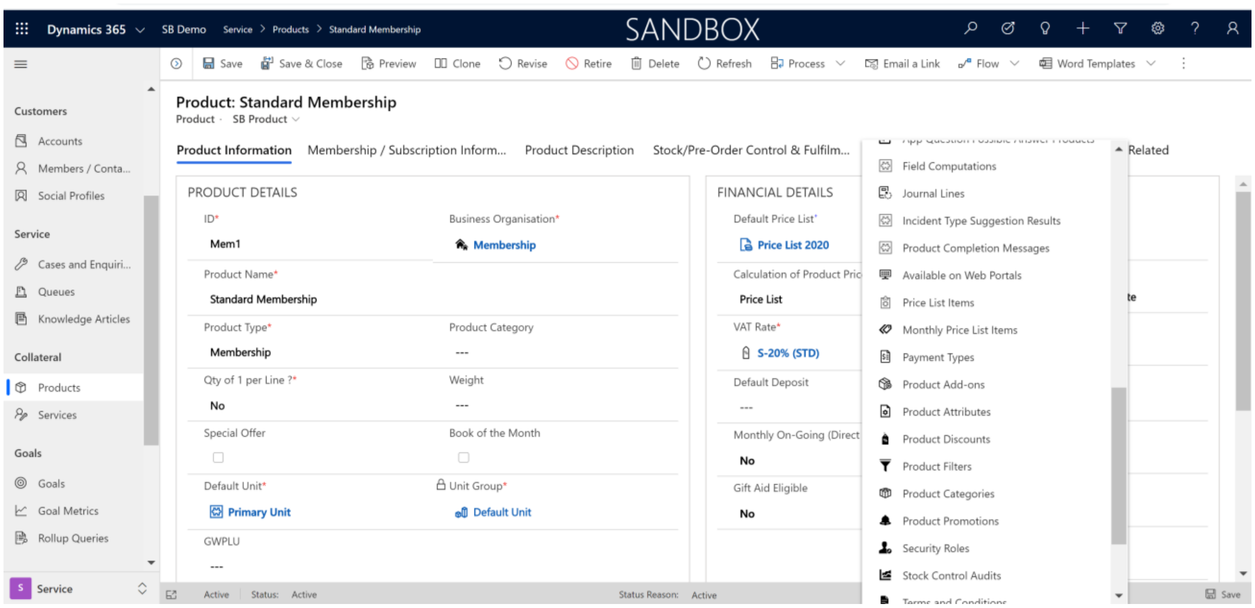
1) The complete package has a standard price
2) The number of component pieces determines the total price.

Example 1 - where a standard Price is used - Free Silverbear Book with every Standard Membership

- Before building the package, each of the components needs to be created as a separate product. We currently have Standard Membership and Silverbear Book setup as products with prices attached, as they can be bought separately.
- Standard Membership is going to be our main product. As the Standard Membership is a product we already offer we could consider creating a new version to attach the free book to. We would probably want to do if we are running a particular promotional membership with the special offer book only offered to certain groups (rather than giving it to anyone who buys it.) In that case I would set up a new product named Standard Membership Promotion or similar and would follow the steps described in the previous sections to set up the membership normally. However, in this example we are offering our free

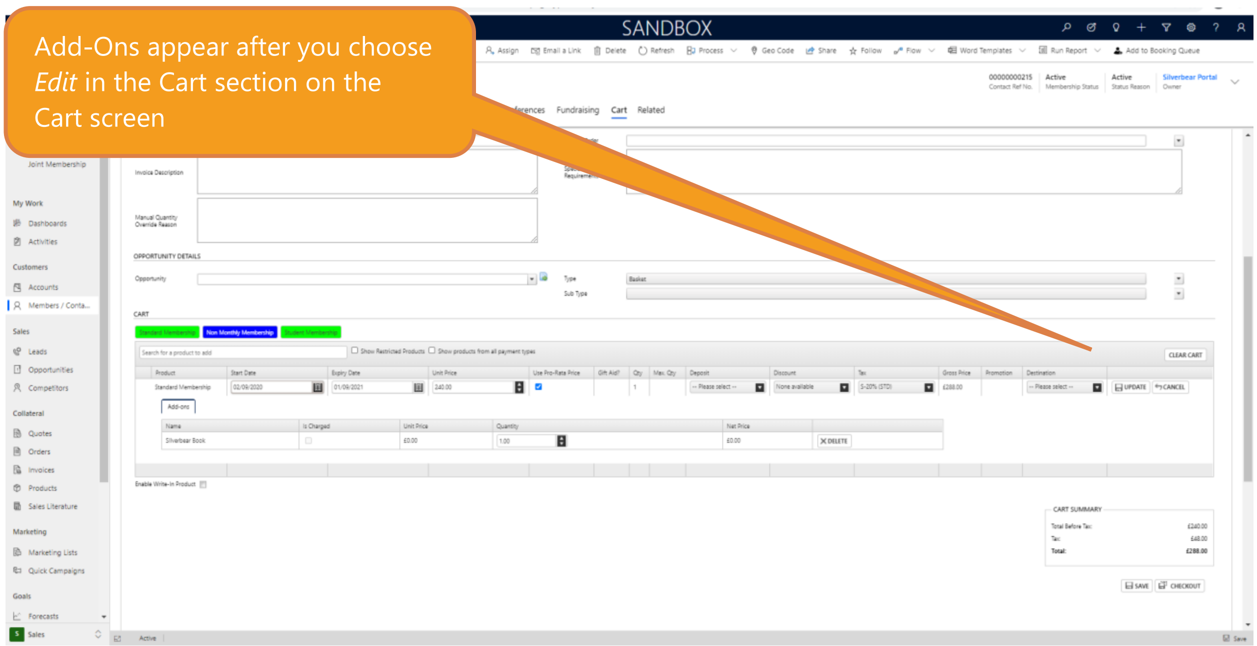
book to anyone who buys the Standard Membership, and I would remove the book when I finish the promotion.

- Find the product you are updating to be the main product or remain in the product setup for the new product if you are making one from scrath
- Because I am charging a set price for this bundle, I will leave the field *Calculation of Product Price* as Price List. The CRM will use the price as it appears on the price list(s) to give the price of the Standard Membership. The Standard membership is the primary product in this bundle so the standard membership price on the price list(s) will be the cost of the bundle
- The Book is currently priced at £10, as it can be bought separately. However, for this offer the book will be free. As the option Price List is chosen in the field Calculation of Price List, and as the book will be an add on product, it does not matter that there is a charge for the book on the price list(s). The CRM will ignore the price as it will just apply the price for the main product which is the Standard Membership, so there is no need to change the details for this secondary product in this case
- To attach the Book to the Membership, open the Membership Product (in this case Standard Membership) and click *Related* and then *Product Add-ons*

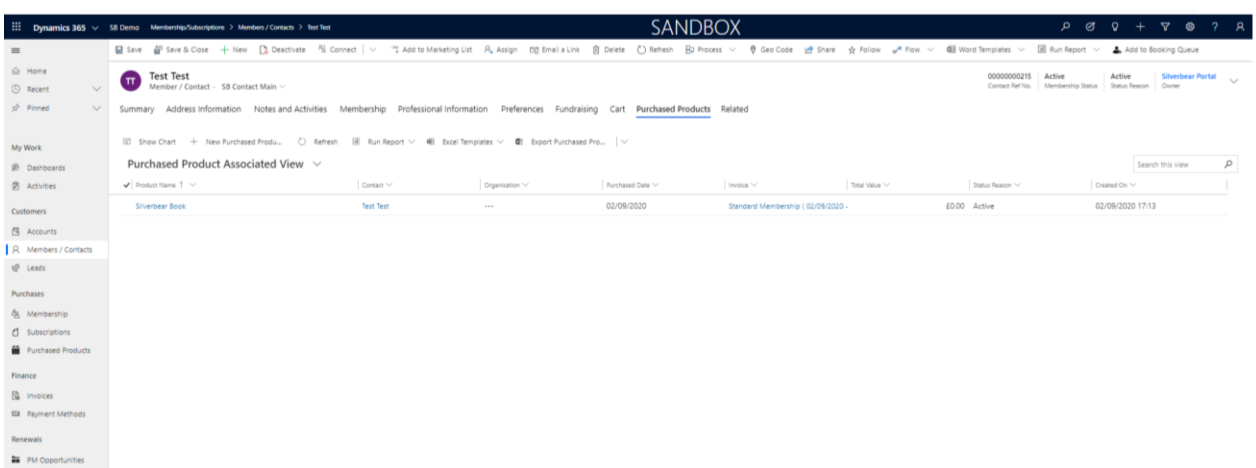


- Press +New Product Add-on
- In the Product Add-on field search for the item to be bunded up with the membership
- Enter the number of free products that the customer will receive (in this case 1)

- If you want to track these products (which is most likely if you will need to fulfil them and send them out and may need to have your stock control figures updated), then set the Create Product Record option to **Yes**.
- Press Save & Close
- When the Standard Membership is sold the price in the cart remains at the price of the Standard Membership. The free book is not instantly visible but does appear if you press Edit in the Cart section at the bottom



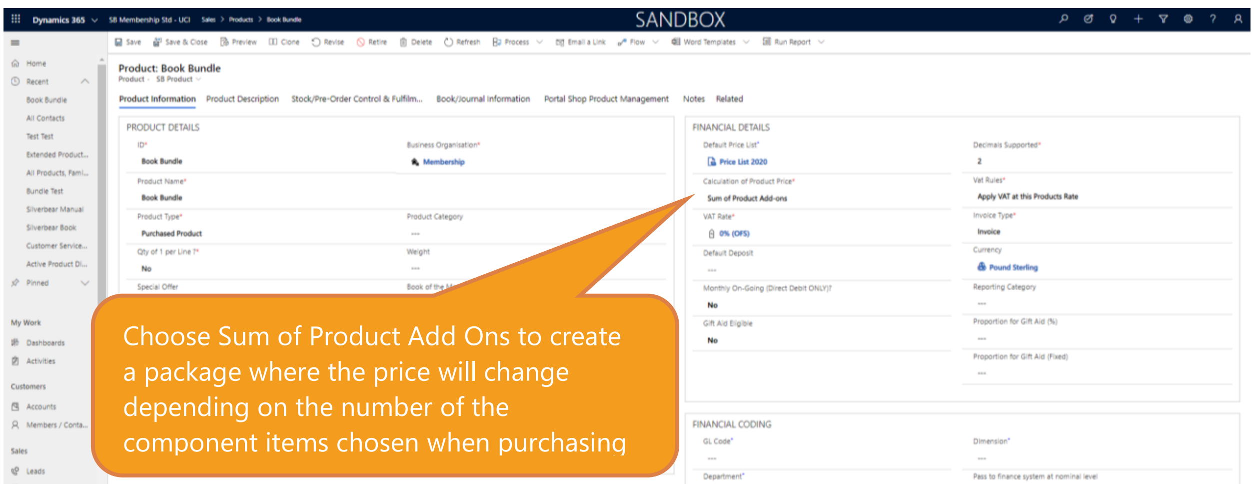
- Checking out as normal then processes the membership and the book "sale" is visible on the Related- *Purchased Products* view.
- Note that if the membership product renews before the free book is removed as an add-on then another Purchased Product for the book will be created at the renewal date



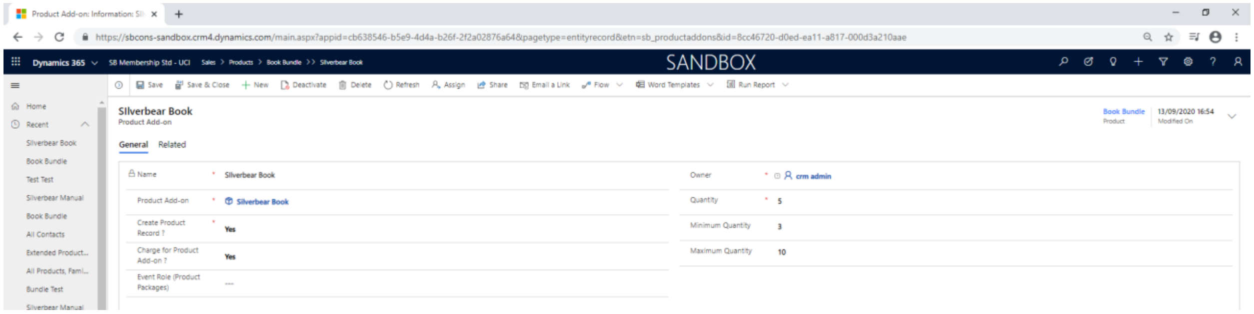
Example 2 where the number of component pieces determines the total price – bundle of books and manuals

This type of package allows you to bundle together items to be sold under one heading, in this case Book Bundle. The price in the Cart or Portal will be the total of all the items that make up the bundle, using their individual prices from the price list(s)

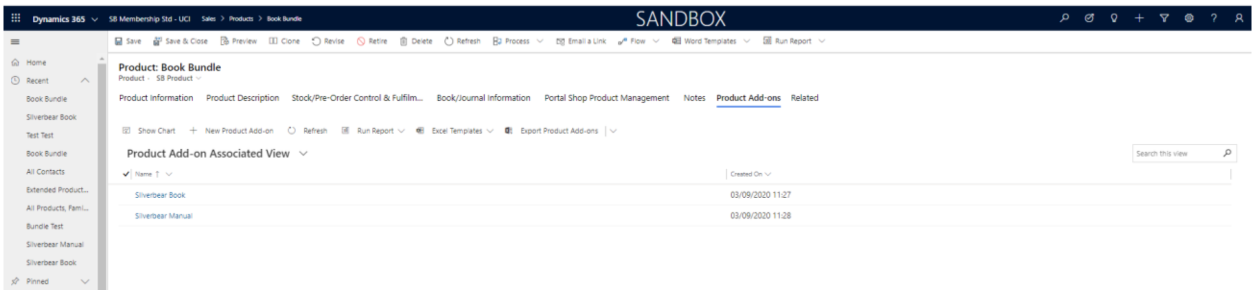
- Create the Primary (main) product, in this case we have created a product named Book Bundle.
- In the *Calculation of Product Price* field, chose **Sum of Product Add-ons**.
- You will still need to choose a default price list, and this item will need to be added to your Price List(s) but the price can be £0, as the price in the Cart will be calculated by adding together the prices of the products that make up this package



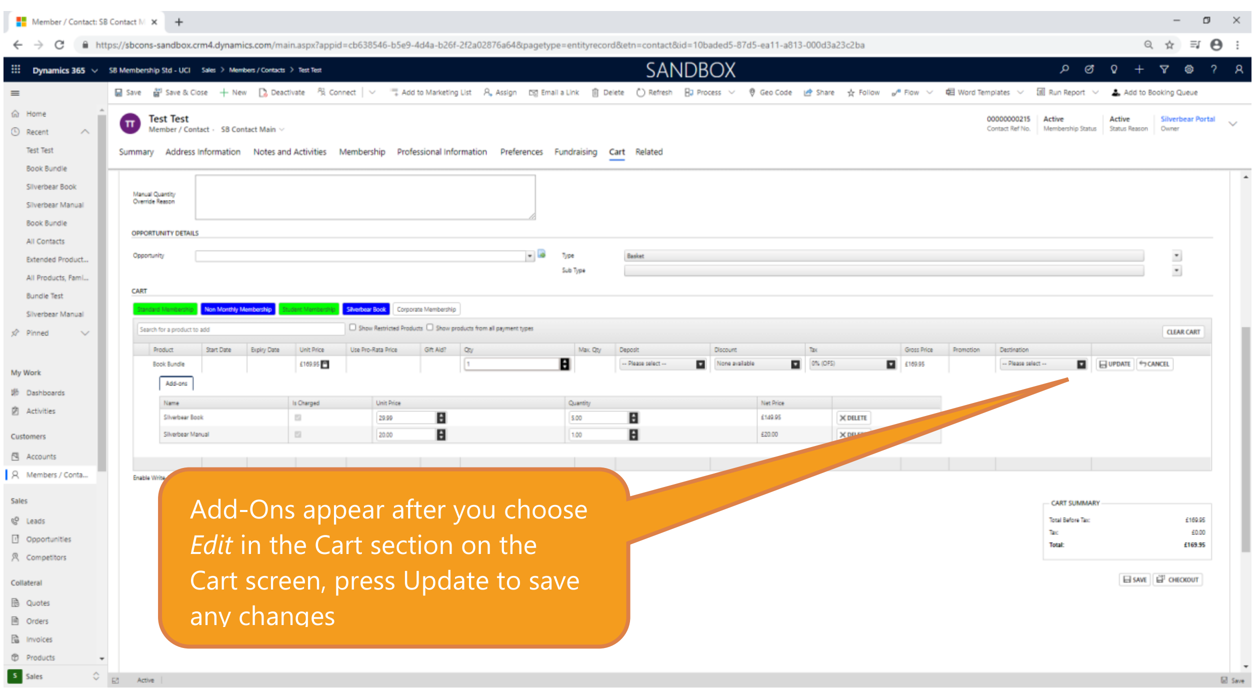
- Once the basic product details are created, and the item has been added to price list(s), go to *Related* and then *Product Add-ons*
- Press +*New Product Add-on*, complete the form as before. If your package consists of multiples of a particular item, the *Quantity* and *Mininum* and *Maximum* quantities can be set. The Quantity will be the default quantity when the package is sold, no less than the *Minimum Quantity* can be purhcased and the *Maximum Quantity* cannot be exceeded



- Press *Save & Close* and then repeat the process for any other products which make up the package



- When the main product is sold in the *Cart*, presing *Edit* will show the Add-ons, the quantities can then be edited (within the boundaries defined by the miniumum and maxiumum levels). Press *Update* to save any changes. The cost of the bundle will change as you change the quantities



4.2. Draw Down Memberships (multiple memberships)

Another form of bundle or package is the Draw Down membership facility, which is a way of providing multiple memberships with one purchase. When purchasing a membership that has been configured for Draw Down, the person or organisation who is paying (the purchaser) will be considered as the main member. Records such as the invoice and the renewal opportunity will be attached to that organisation or member. The secondary member(s) will simply have a membership record which is not renewable individually.

4.3. Draw Down configuration

Draw down memberships are always created in the same way. However, there are configurable options which determine how these memberships are then allocated to the secondary member(s). If you do not already have drawn down memberships configured on your system we recommend you run through these sections on the Configuration/Method of Draw Down section first before you begin setting up your products, as otherwise your draw down memberships may not work in the way you expect them to.

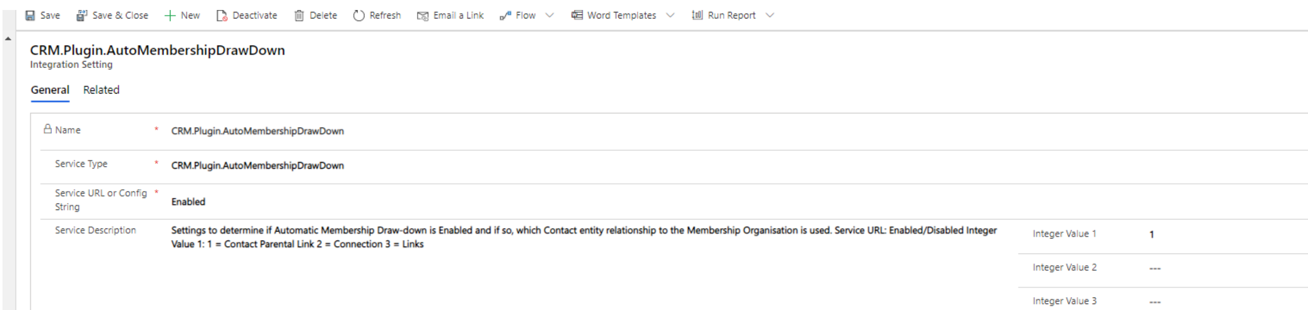
- To check how drawdowns, work in your environment access the Silverbear Settings work area and choose Integration Settings
- In the list of all the Active Integrations, find and open the item named: CRM.Plugin.AutoMembershipDrawDown

Draw down can be configured to use

1) Contact Parental Link
2) Connections
3) Links

- Check which number appears in the Integer Value 1 field. This will show you which of the methods is being applied. Only one of these methods can be active, if the Contact Parental Link is used for Draw Down memberships then the connections approach cannot be used as well

Please note that this configuration should be checked only and should not be amended without the knowledge of a Silverbear Consultant as they may have intentionally designed the Draw Down to occur using another method based on your business requirements.



4.4. Draw Down Method

The following sections briefly describes how these draw down methods work and typical uses. This is followed by some practical examples

Using Contact Parental Link

- This method is typically used for businesses holding corporate memberships to pass employee/individual membership to their staff. To link an individual contact to their organisation, go to the contact record card and choose the relevant organisation in the Parent Customer (or Parent Organisation) field.
- If the organisation is then sold a Corporate membership with individual/employee membership add-ons available, these will be "drawn-down" instantly to any contacts who already have that parent customer/organisation field populated with that company, or to any employees that are updated in that way while the corporate membership is still running.

Using Connections

- The connections function gives you the flexibility of connecting individuals and induvial as well as individuals and companies or companies with other companies.
- This method is typically used when you get a membership derived from someone else membership such as a Joint/couples' membership or a family membership.
- The Connections function is accessible from the Command bar on a Contact or Organisation record card

Using Links

- Links are another way of creating a relationship between contacts and organisation on Silverbear. Unlike connections, which can be used to create a relationship between organisations and organisations, links can only be used to connect members and organisations, as an alternative to being restricted to using the Parental contact link.

- Links are accessed by clicking on the Related drop down from a Contact or Organisation record card and choosing Links

4.5. Creating Draw Down Memberships

Draw down memberships are always created in the same way. However, there are configurable options which determine how these memberships are then allocated to the secondary member(s). If you do not already have drawn down memberships configured on your system you may wish to check the Configuration/Method of Draw Down section above first before you begin setting up your products. The memberships below are examples only, you are not restricted to these types of Draw Downs because of the configuration, you should be able to create different draw-downs with any of the draw down options (links, connections or parental link)

Example 1 - Couples (joint) membership, using Connections draw down

In this example we have a membership aimed at two people. The membership will be sold to one individual

Firstly, you will need to create two membership products, for example Joint Membership – Primary r and Joint Membership – Secondary. The Joint Membership should be set up in a normal way and have prices added to your price lists. The Secondary membership does not need any prices attached. Next, add the Secondary Membership to the Primary one through the Add-on process.

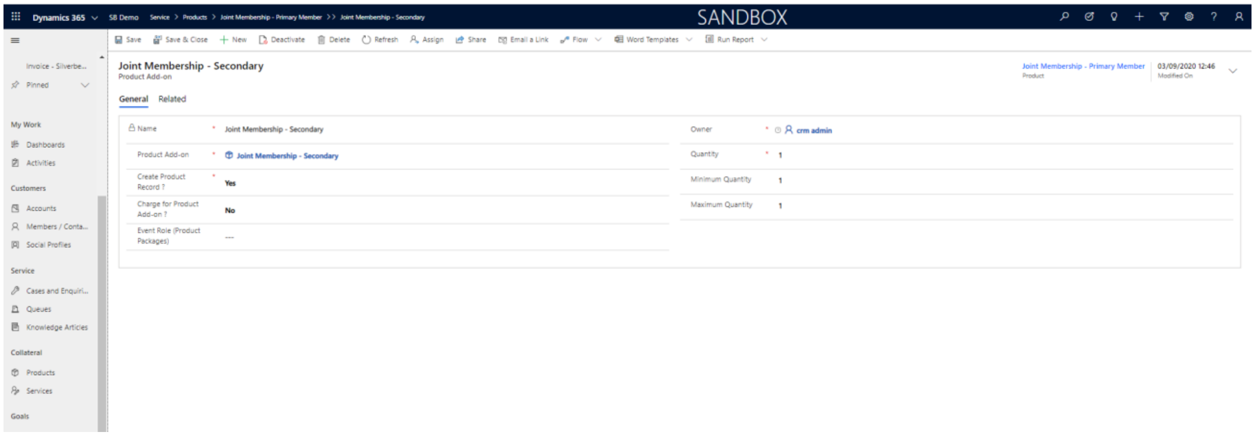
Open the Primary Membership, choose Related and then Product Add-On

The Membership set-up

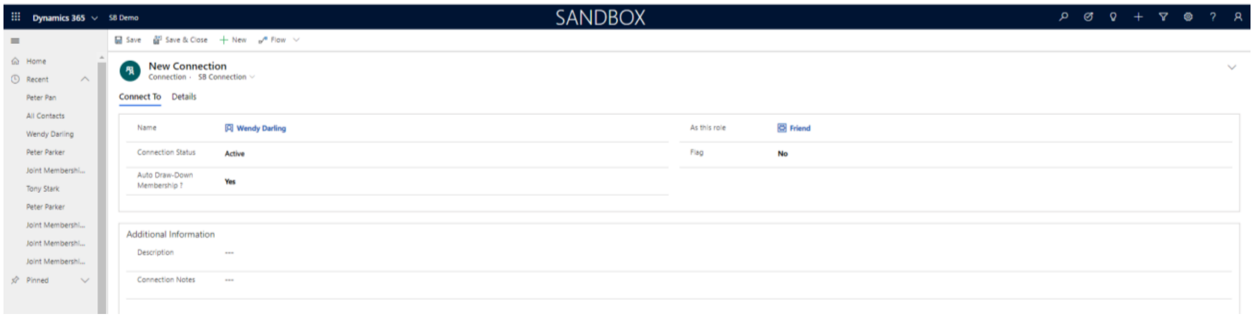
First, you will need to create two membership products: for example, "Joint Member – Primary" and "Joint Member – Secondary". These should be created in the normal way except you will not need to add the Secondary membershp to a price list.

Next, you will attach the "Secondary" membership to the "Primary" membership as an Add-on.

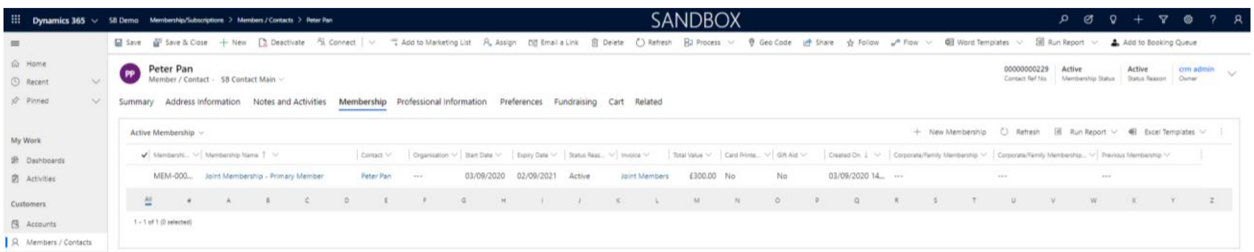
- Open the Primary Membership
- Click *Related* and then *Product Add-ons*
- In *Product Add-On c*hoose the Secondary Membership,
- In *Create Product Record* choose **No**
- For *Quantity* enter the number of secondary memberships given by default. In this case this is a joint membership so there is just one secondary membership,
- *Minimum Quantity*: the default is 1
- *Maximum Quantity*: In this case there is just one secondary membership, so it is set as 1
- Once completed press *Save & Close*



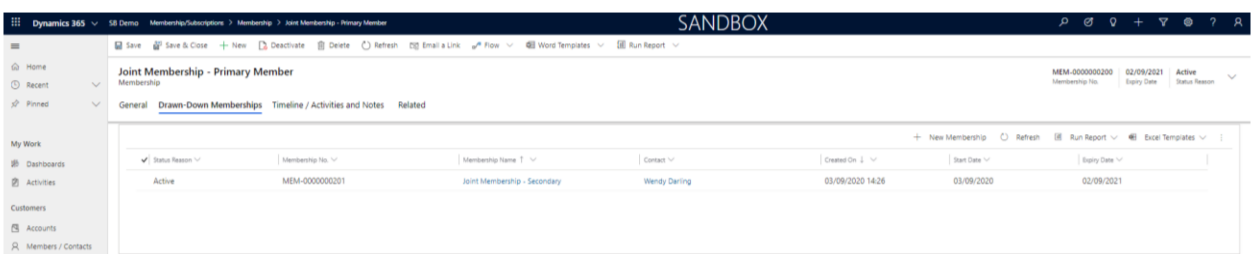
- To sell the membership in the Cart, chose the primary member (the person paying) and access the *Cart*
- Choose the Primary Membership in the bottom section to sell and then click on *Edit* to see the secondary membership appear. This allows you to change the number of secondary memberships being offered, however the price will not change
- Once the sale is completed, the Primary member will have a secondary membership available to draw down.
- Depending on your configuration, this secondary membership will then be applied to individual(s) related to that contact in a specific way. Please see the Method of Draw Down section for further details. In this scenario, draw-downs are controlled by the Connections functionality. Our Contact Peter Pan has bought a Primary Membership and he wants to pass the secondary membership to his friend Wendy Darling who is not yet connected to him on CRM
- You can add Wendy before or after selling Peter the Membership, but she will need to be added and then connected to him in order to provide her with the secondary Membership. We recommend you add the secondary member (if they are not already a contact) using the full contact form before connecting as that will ensure you have all the mandatory information your system requires
- Once the secondary contact is added, open the Primary Contact record and press *Connect* on the Command Bar
- Complete the details as following and make sure Auto Draw Down is chosen for the membership to be automatically allocated to this connection.



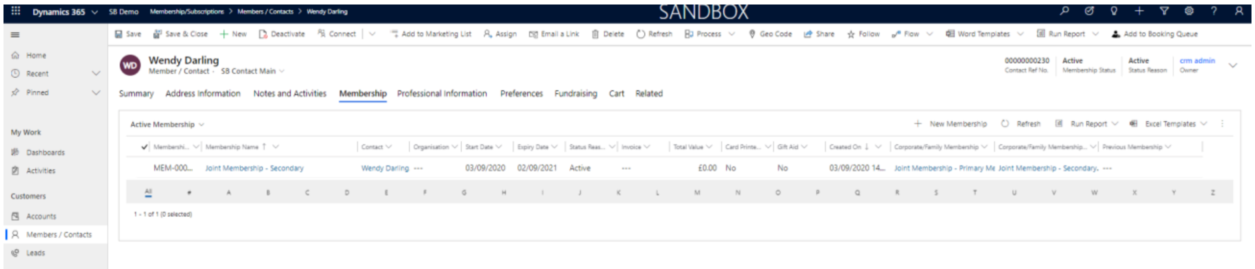
- Once the primary contact (in this case Peter) has bought the Joint membership, and Wendy has been connected to him with an Auto-Draw down connection, then the following will happen:
    - Peter (Primary Contact) will have a Joint Membership- Primary Membership record as below. He will receive an invoice for the full amount. This membership is renewable (assuming you have created it as a renewable membership)



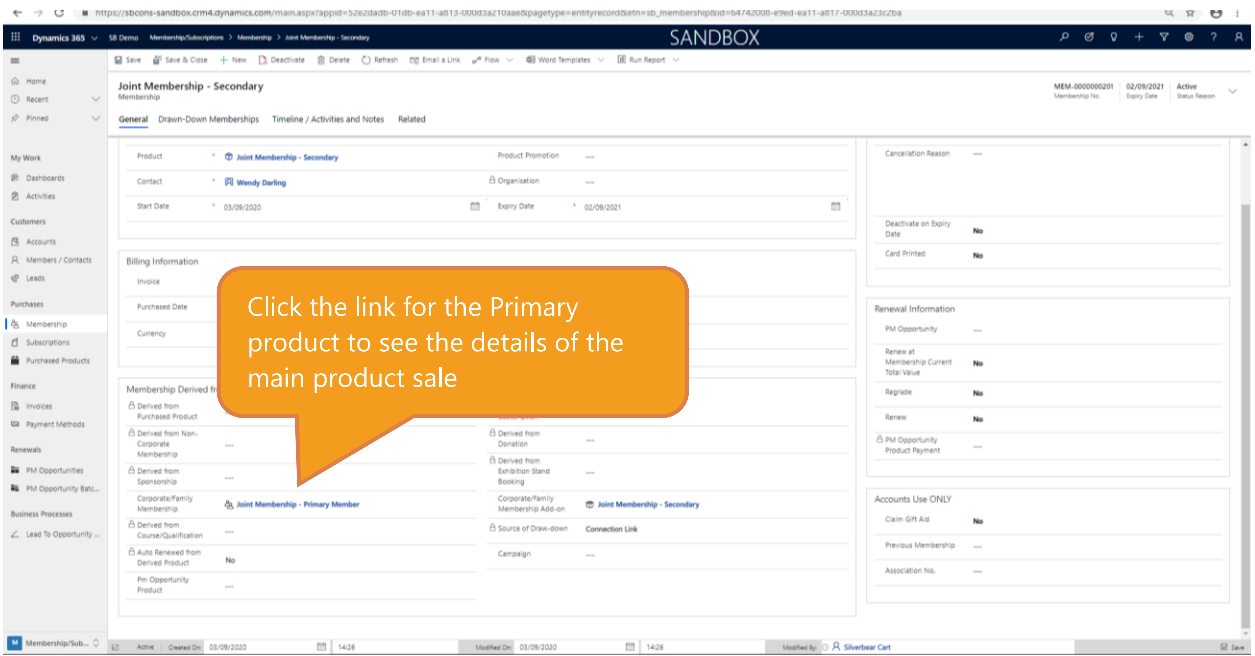
- If you click through this membership, and choose Drawn-down memberships you can see any secondary memberships which have been applied, in this case to Wendy Darling



- Wendy (Secondary Contact) will have a Joint Membership – Secondary Membership attached to her record, showing as a “Corporate/Family Membership”. She will not receive an invoice



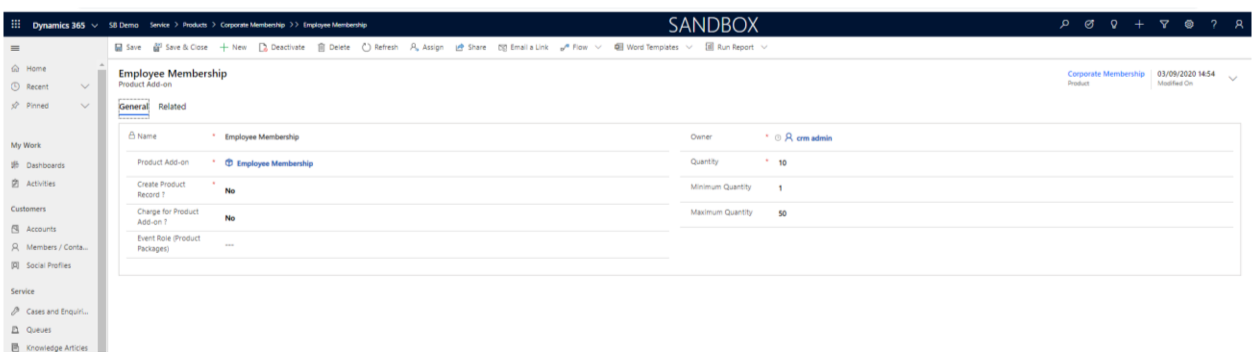
- Clicking through this record confirms the source of it – the Joint Membership – Primary Member record is shown in the *Membership Derived From* section. This can be clicked through to see the Primary Membership.



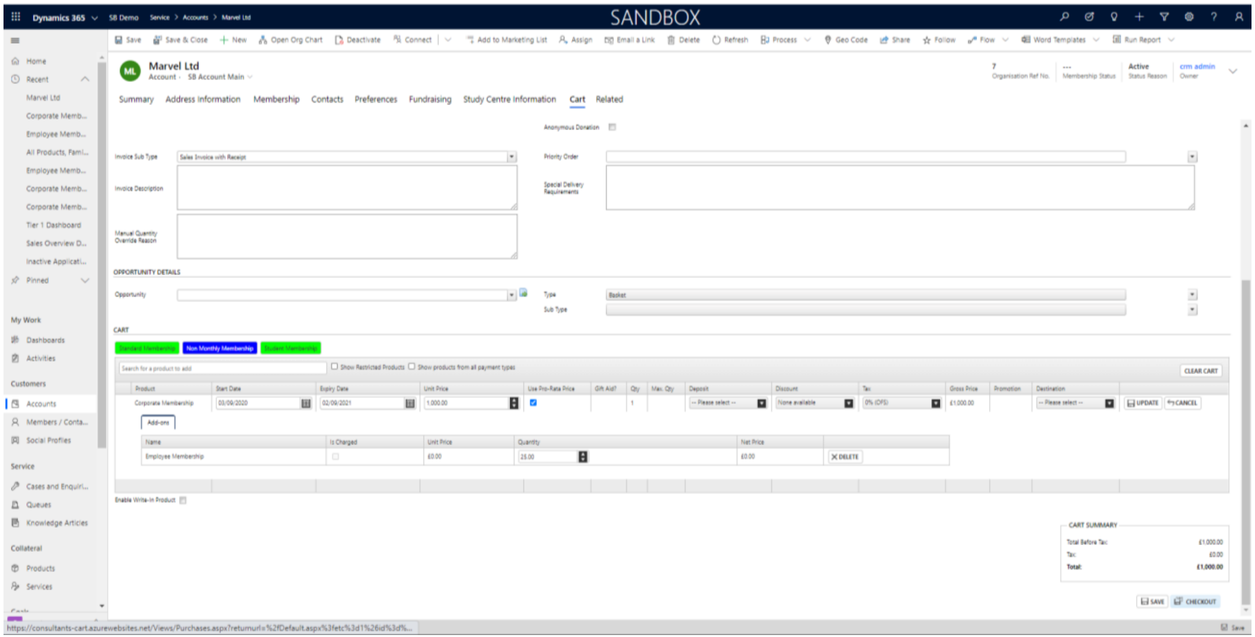
Multiple draw-downs example 2 – Corporate to employee membership – using parental link draw down

In this scenario, a corporate membership is created. With every purchase of this corporate membership, a company is entitled to up to 50 individual memberships to give to its staff, although the actual number is set at the time of purchase. The assumption made here is that the method of Draw Down configured on the Silverbear CRM is the Parental Organisation

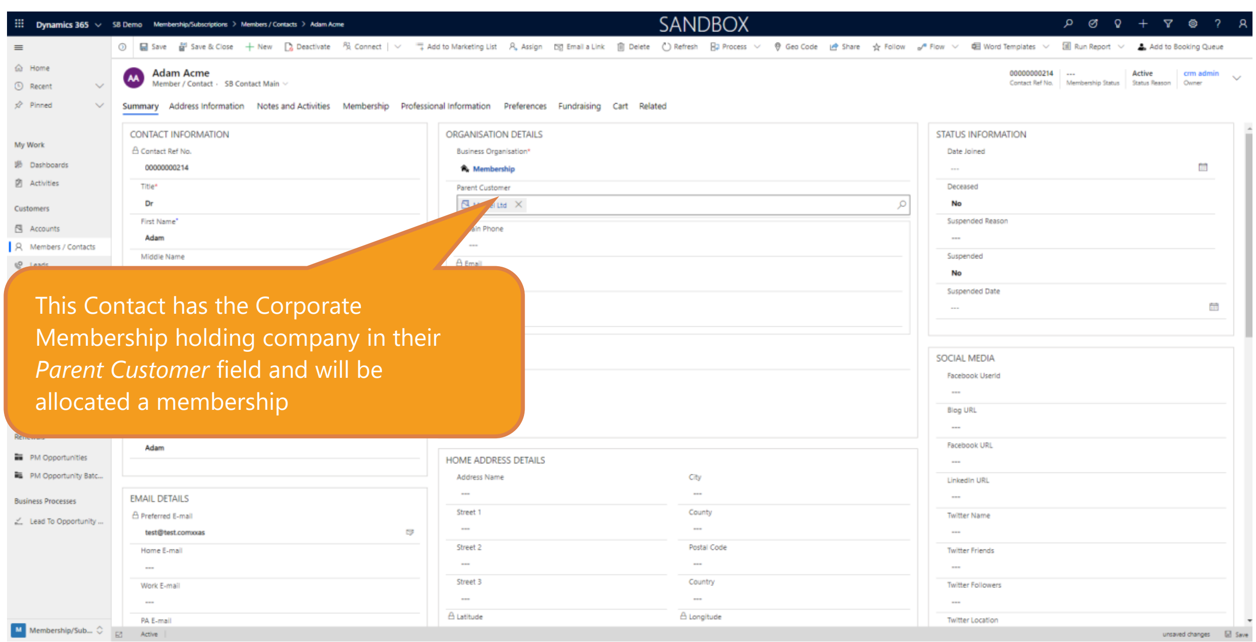
- The Corporate Membership is created in the standard way, in this case it is a renewable membership for a 12-month period. It is added to the price lists and is published
- An Employee membership is created. It is a renewable membership for a 12-month period but is not added to the price lists. It is published
- The Employee Membership is attached to the corporate membership as a Product Add-On
- *Quantity* is set to 10, this will be the default number of Employee Memberships given
- *Minimum Quantity* is set to 1
- *Maximum Quantity*: set to 50 (you can change the quantity to up to 50)
- Once completed press *Save & Close*



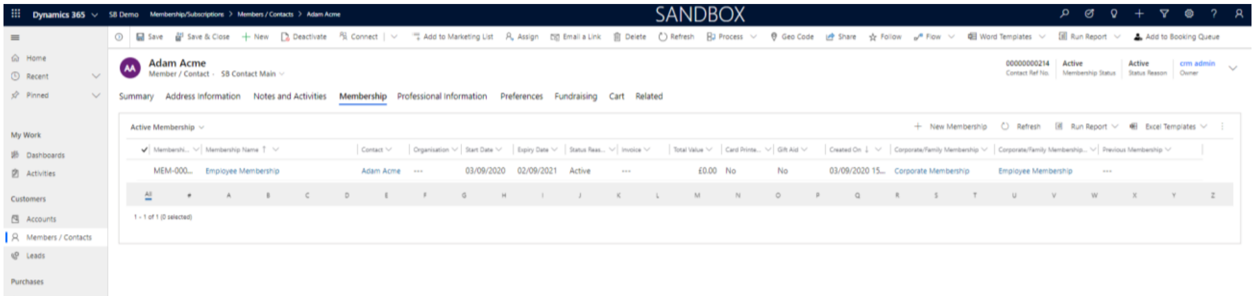
- To sell the membership in the Cart, search for the account/organisation buying the membership and access the *Cart*
- Choose the Corporate Membership in the bottom section to sell and then click on *Edit* to see the secondary membership appear. This allows you to change the number of secondary memberships being offered, however the price will not change. Make sure you choose Update after changing the quantity. In this example we have chosen 25 secondary memberships.
- Complete the transaction as normal



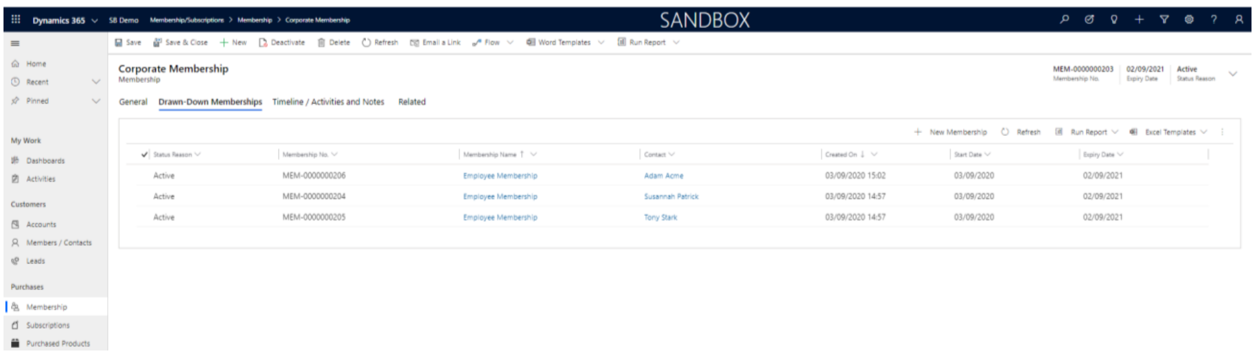
- At this stage the Organisation now has 25 Memberships to give away to its employees. The method of draw-down in this scenario is *Contact Parental Link*. A Contact with the organisation entered in the *Parent Customer* field (often named *Parent Organisation*) on their record card as below will be allocated a membership



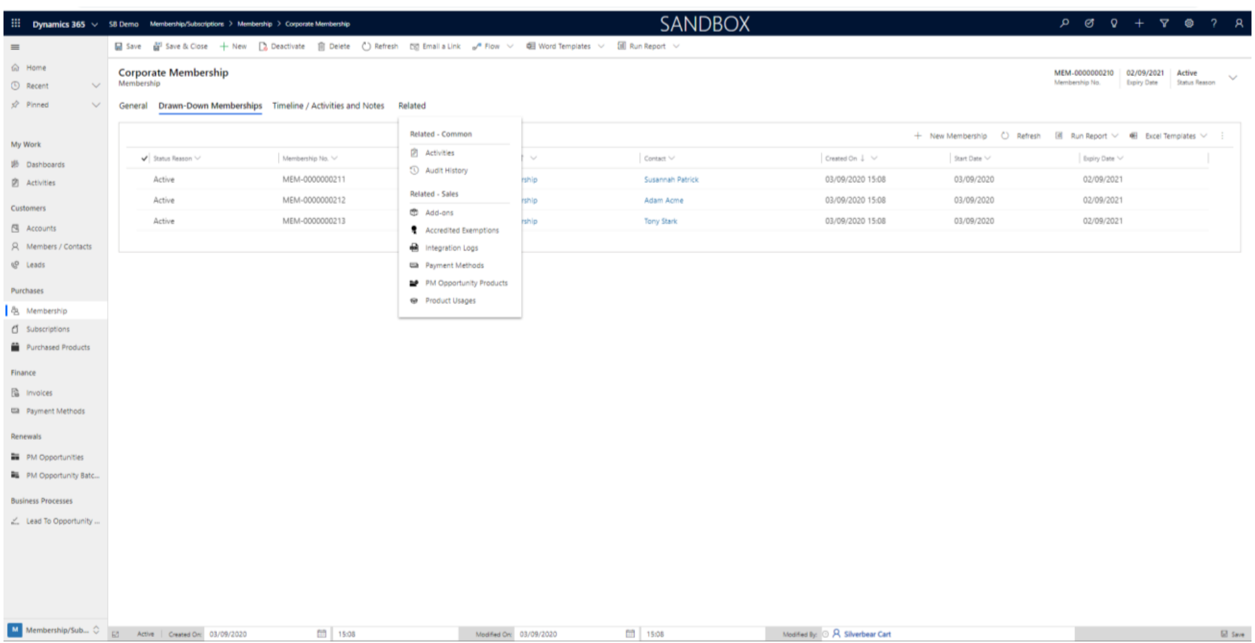
- Clicking through to the Contact's membership tab shows the Employee Membership



- When viewing the membership records for the organisation that purchased the membership, we can see any draw-downs that have been allocated. In this case, there were three contacts with this organisation as their Parent Customer



- To check how many remaining employee memberships this organisation has to allocate, click on *Related* and then *Add-Ons*

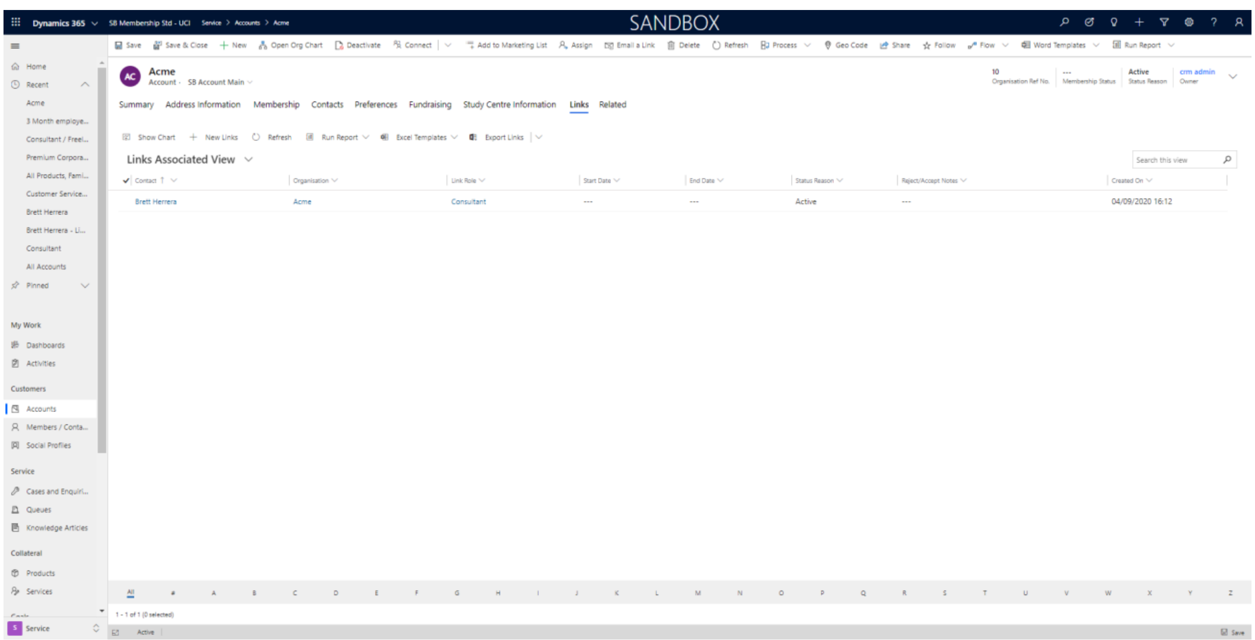


- You can see the details of the remaining employee memberships available on the next screen, and clicking through gives you further detail

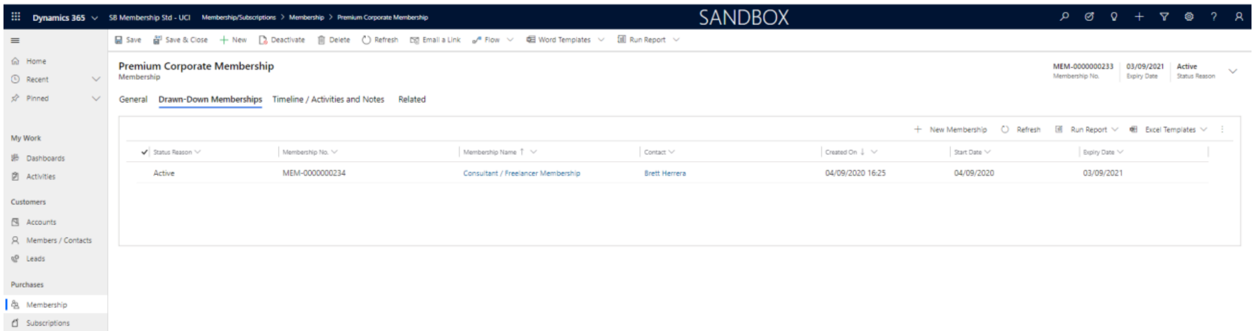
Multiple draw-downs example 3 – Business to consultant membership – using links draw down

In this scenario, we have organisations which have consultants and this relationship between them is established through the links mechanism, as an alternative to using the Parental Contact field. The method of creating the Business membership and the consultant membership is the same as in example 2, but it is the links functionality which drives the allocation of the draw down in this case. The links function has the advantage that an individual could be linked to different organisations.

- Acme ltd is sold a Premium membership with 100 freelancer/contracts memberships
- Individuals are established in these roles using links.
- These links could be created through customised portal functions if they have been created for your organisation, with potential for approval functionality for the organisation (so that they can confirm that the link is valid). However, links can also be created in the CRM
- To create a link in the CRM, create or open the contact record for the consultant
- Go to *Related* and then *Links* and create the link as below, choosing an appropriate link role (link roles can have added functionality in the portal)
- Set the *Status Reason* as Active and *Save& Close*



- When the organisation is sold a corporate membership with add ons, then the consultant will be given the individual membership, just as before this will appear on the consultant's record as follows



4.6. Secondary membership – duration, cancellations and renewals

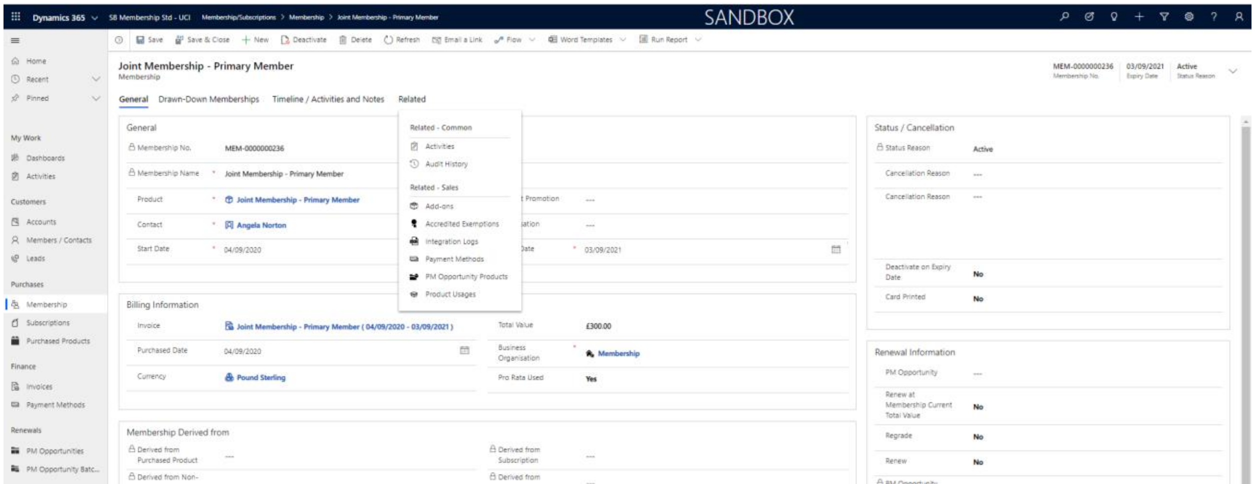
Please note that this is standard configuration behaviour. It is possible that your Silverbear system will be configured differently. We recommend you verify these processes in UAT if unsure

- The secondary membership would normally have the same duration and start date and end date as the primary membership, regardless of when it was allocated
- If the Primary membership is cancelled or deleted, then the secondary memberships will also be cancelled
- The primary membership record is used for renewal purposes. The holders of the secondary memberships will not be able to renew their memberships individually as they do not have pm opportunities
- The secondary membership(s) will normally be renewed automatically when the primary membership is renewed
- Secondary membership can be cancelled individually
- If the parental link is broken, then the employee membership record will be automatically made inactive and the remaining add-ons will be increased to account for this

4.7. Manual Draw Down

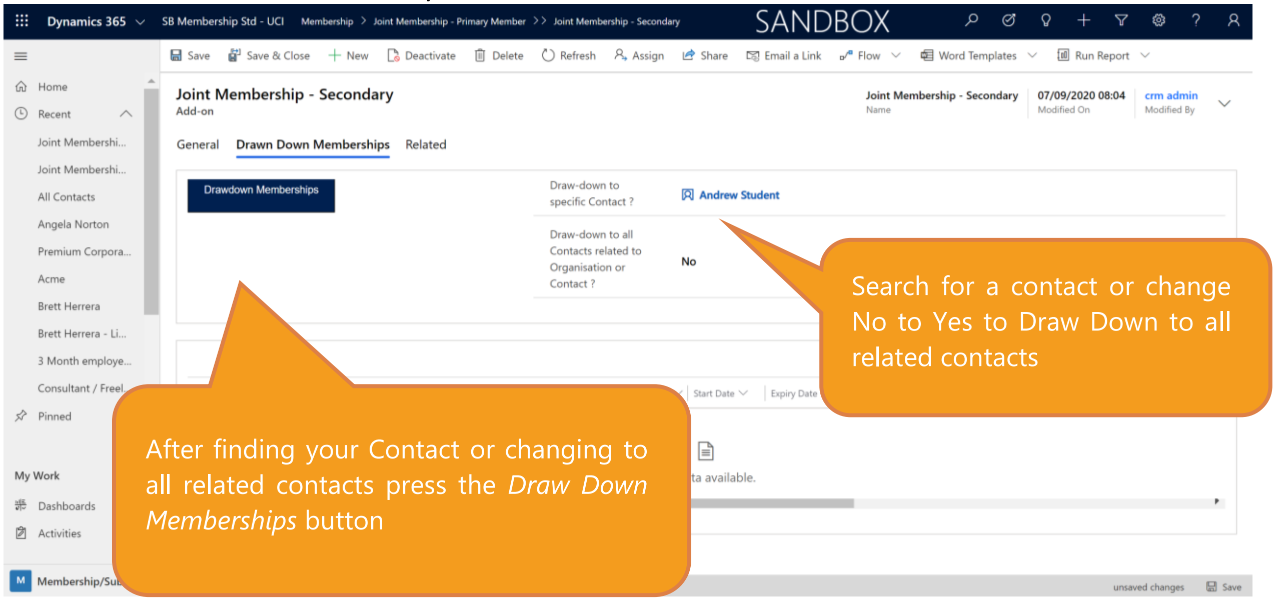
- There may be occasions when you need to use the Manual Draw Down facility. If for example your main draw down functionality is set to use the Parental Customer field, but you have a new type of Multiple membership which that is not suitable for, e.g. a Couples membership.

- Sell the primary membership as normal to the main membership holder (the person to whom you want to issue the invoice and the renewable primary membership)
- Open the membership record

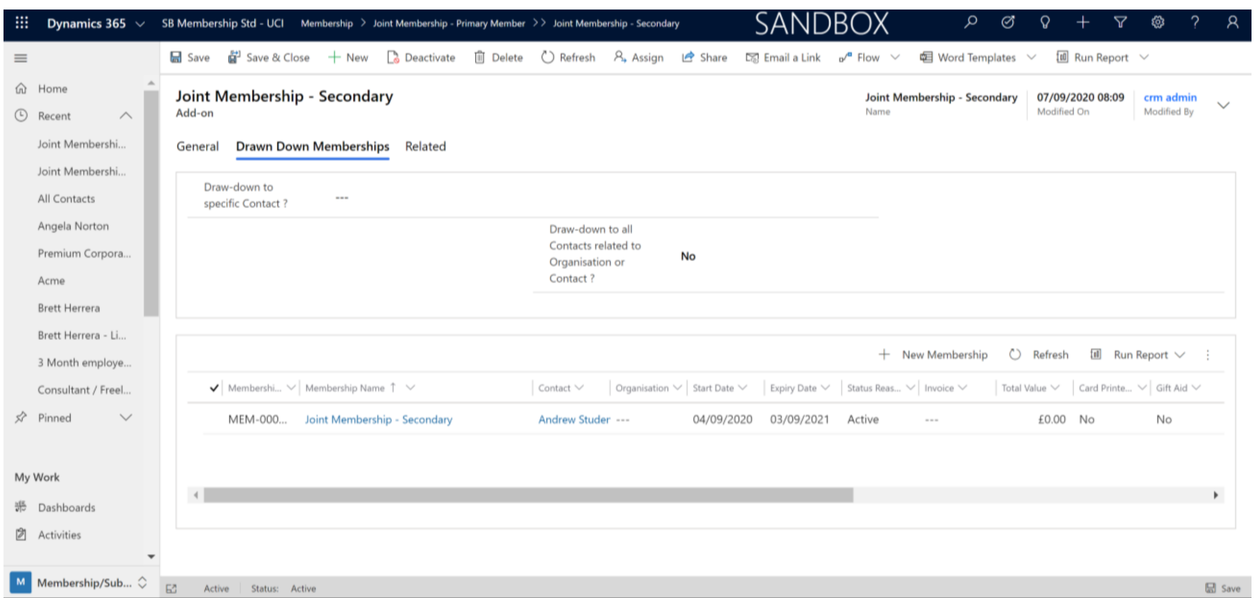


- Click *Related* and then *Add-ons* The details for the add-ons that were granted with this membership are displayed, including the number remaining – there must be at least one remaining to carry out this process.
- Click on the name of the add on – in this case the Joint Membership-Secondary hyperlink and click on the *Drawn Down Memberships* tab
- Specify which contact is going to receive the Draw Down. You can choose to Draw Down to a chosen individual by searching for them in the *Draw Down to Specific Contacts?* or to all contacts who are connected to the lead member by changing the *Draw Down to all contacts related to this Organisation or Contact?* field to **Yes**. In this case we have searched for a Contact

- Click the *Draw-down Membership* button



- After confirming you should then see the allocated membership in the lower section (you may have to refresh the screen first)



5. Selling your products on the portal

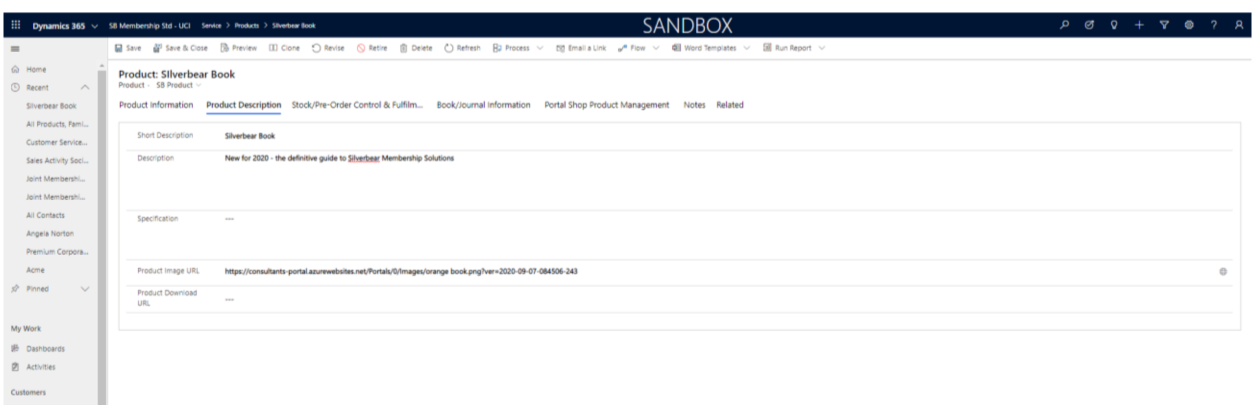
After your products have been created in Silverbear CRM and are available to sell in the Cart, there are some further steps to take to publish them on your portal and make them available for online sales.

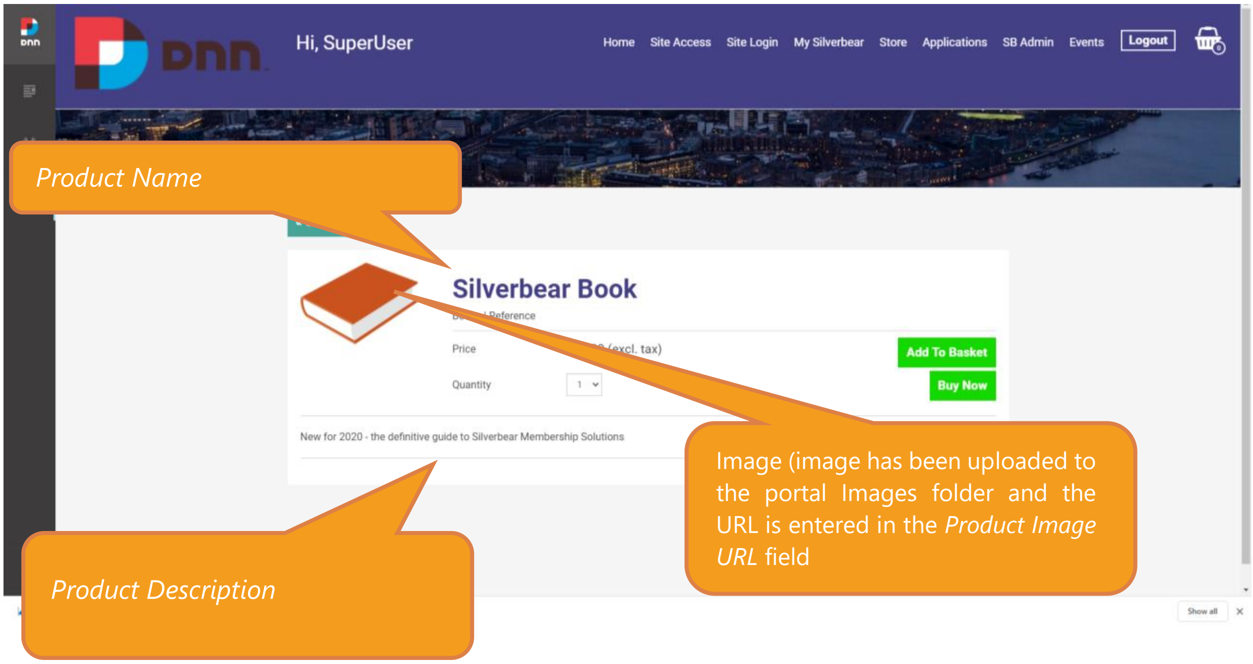
- There are some mandatory fields in the product setup (on top of the normal product setup fields)
- They need to be enabled for portal sales
- They must be put into a Product Category
- They can have optional Metadata – additional images and documents attached
- You can use product variants to help cross sell other products (optional)

5.1. Portal sales - mandatory product setup fields

Please note that your product needs to be set up as normal and published to appear on the portal. Please refer to the sections on product setup for a reminder of how to create a product. The points below are additional mandatory steps to make your product appear on the portal. We recommend you check that your product appears in the cart before going through the steps to publish it online.

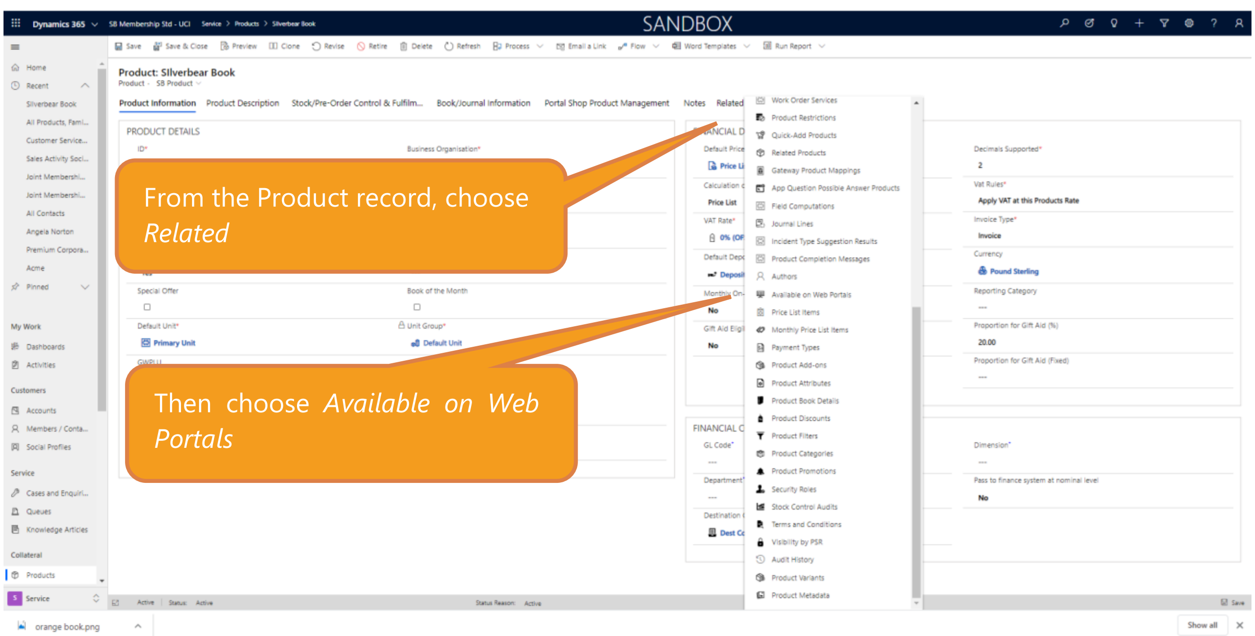
- On the product setup screen, press the *Product Description* tab
- The *Description* will appear on your portal, so should be detailed enough to allow for an informed purchase
- The *Product Image URL* is a link to an online location of a hosted image. Images can be uploaded to your web portal via the DNN admin pages.
- Go to the stock control tab and enter a maximum quantity for purchase. This is essential for the drop-down quantity selector to appear when buying this product





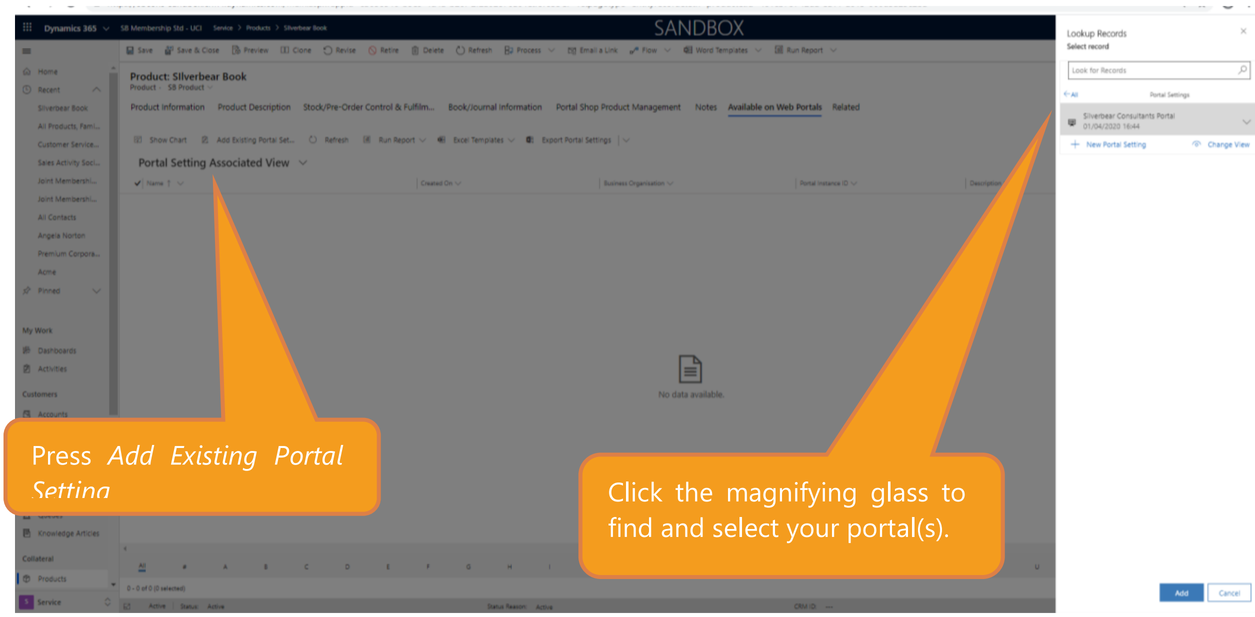
5.2. Enabling for Portal Sales

- This is a mandatory process, your item will not appear on the portal if this is not completed
- Open the product and click on *Related* and then *Available on Web Portals*



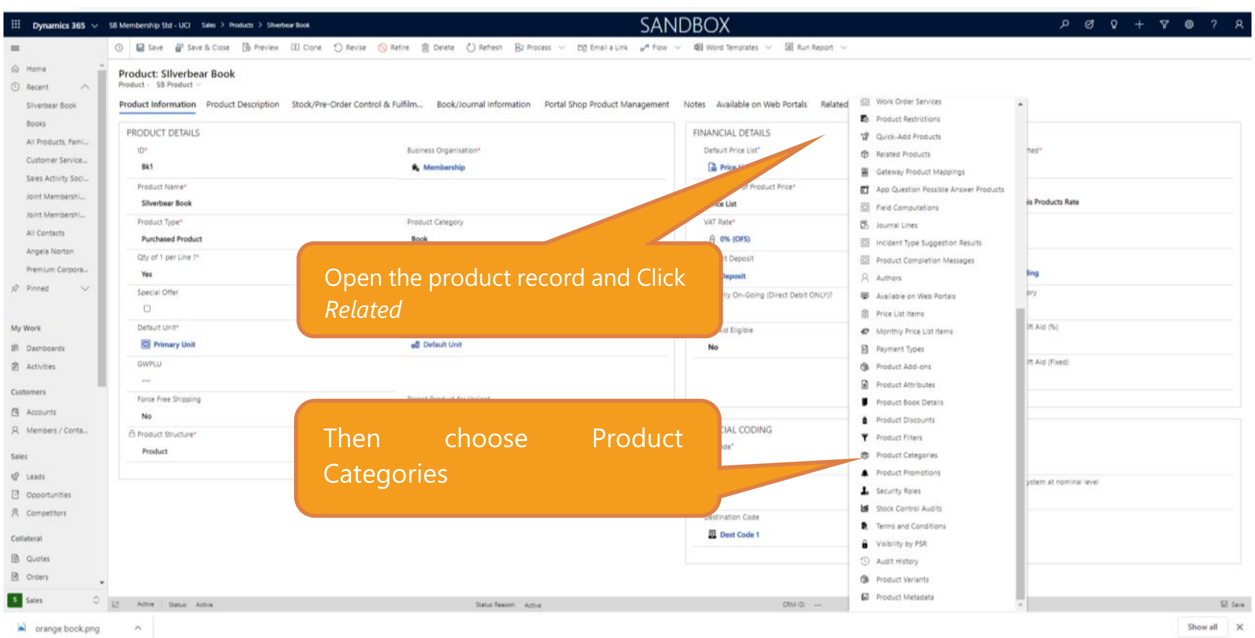
- Press the *Add Existing Portal* setting option on the tool bar

- A search window should appear on the left, clicking the magnifying glass will bring up your web portal(s). Click on the portal or portal of your choice if you have more than one and press *Add*
- Press *Save* or *Save & Close*

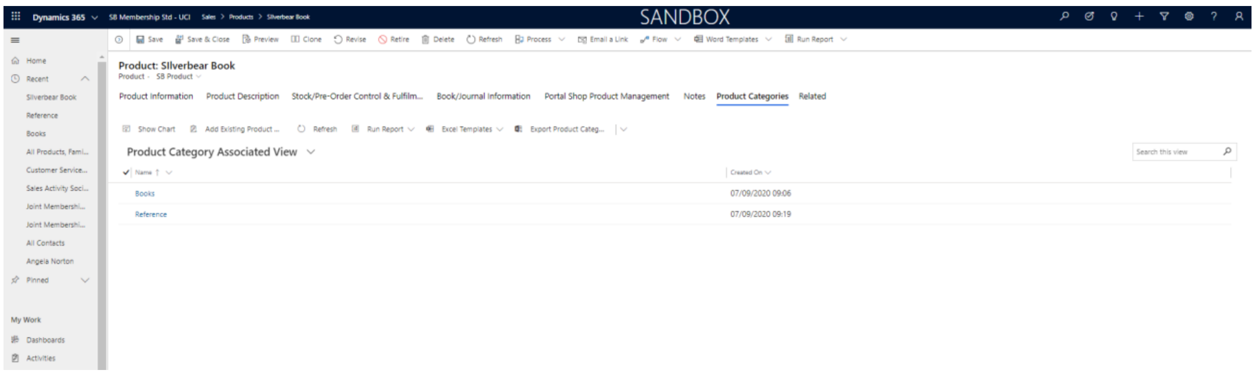


5.3. Define the (Portal)Product Category

- Items for sale on the portal must be assigned a Product Category – this a separate procedure to choosing a category in the Product Category field which appear on the Product Information page.Open the product record and click *Related* and then *Product Categories*



- If this product is already in any Product Categories, they will be shown on the next screen
- To add the product to a Category, press *Add Existing Product Category* on the tool bar
- A search window will appear on the right-hand side
- Use the search facility to find a relevant category. You can also add new categories at this stage (you will leave your record so you should save it before doing this if you have made other changes)
- Products can be added to more than one Category.

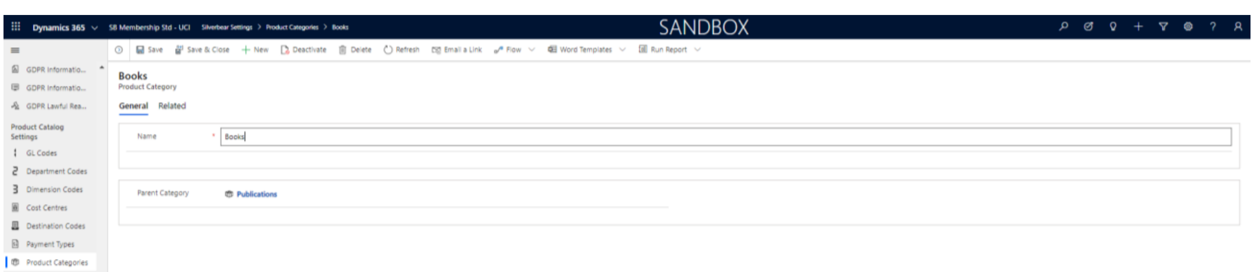


- Press *Save & Close*

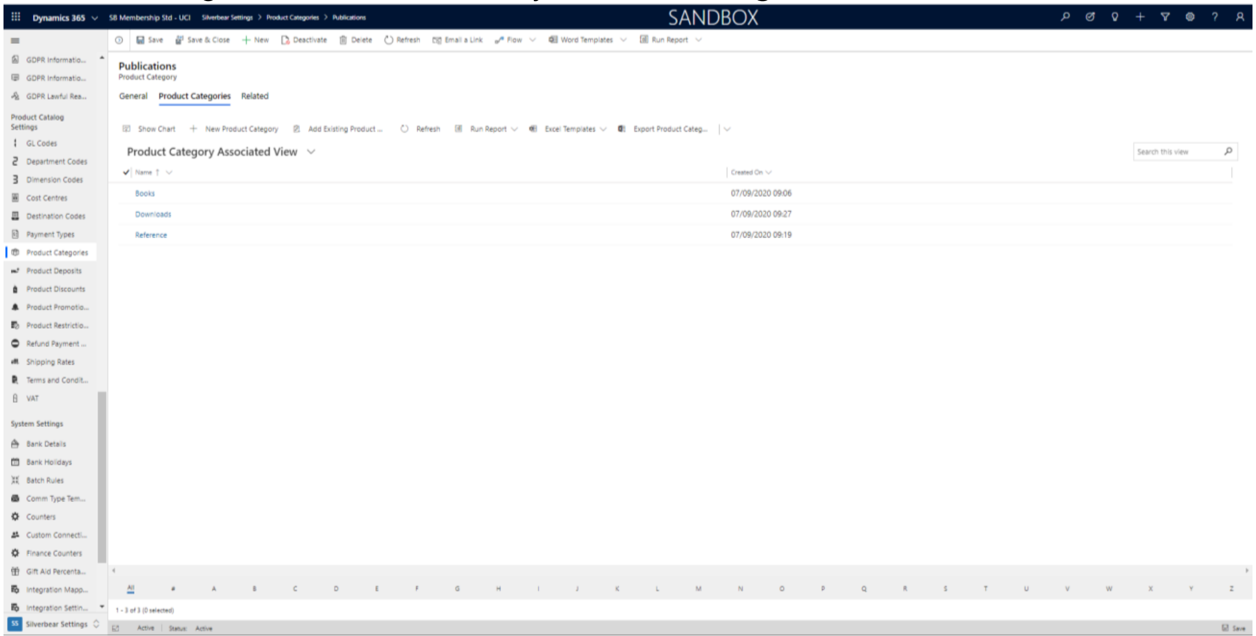
5.4. Further category Options – parent/child categories

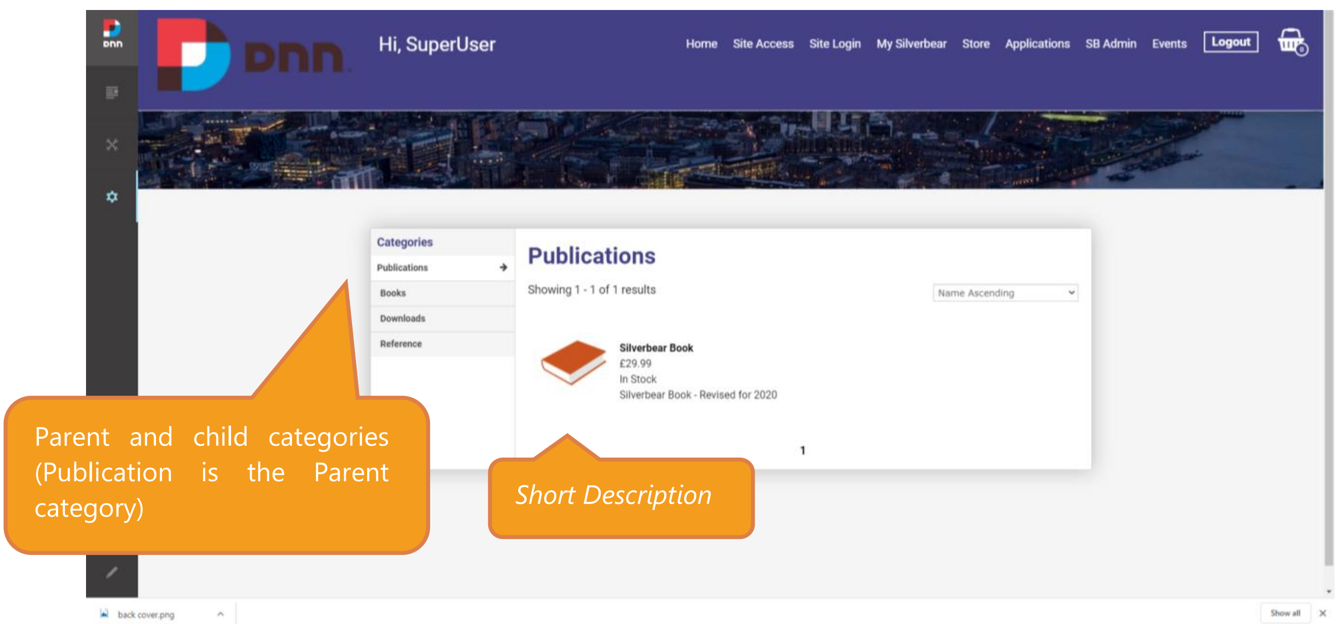
If you offer a wide range of product on the portal you might want to use a system of parent/child categories, for example Publications could be a parent category with Books, Reports, Downloads being subcategories.

- Click on the *Silverbear Settings* Work Area then the *Product Categories* menu option
- New Categories – parent or otherwise – can be added here by pressing +*New*. A Parent category is set up in the same way as any other category.
- To establish the hierarchy, edit or add a child category and put the relevant *Parent Category* in that field as below (then press *Save & Close*)



- To see a Parent Category's child categories, open the category and choose *Related – Categories*, this will show any child/sub catagories Silverbear46!



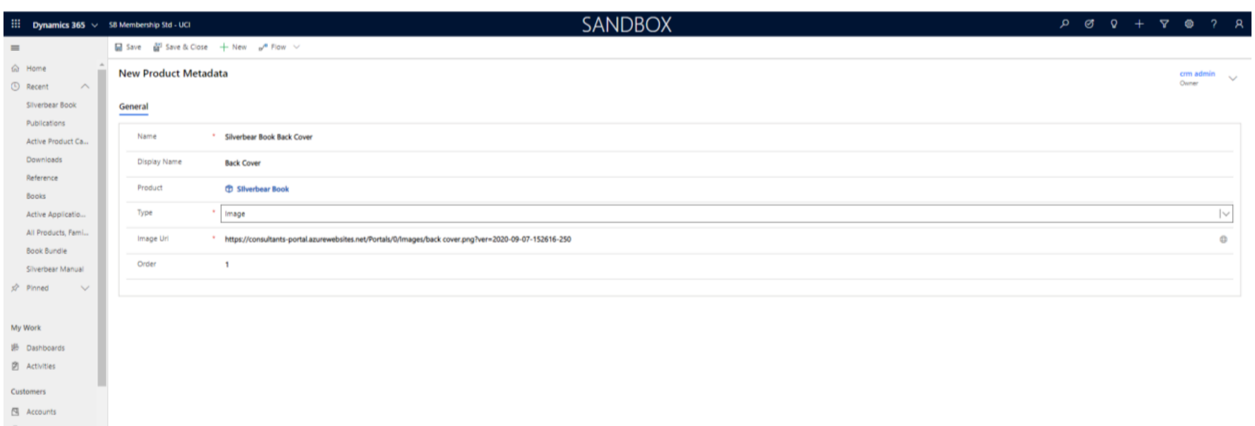


5.5. Metadata (Portal)

To enhance your presentation of your products on your web portal you can use additional images and document downloads (for example some example pdf pages of a book)

Adding Images

- From the product record, choose *Related* and then *Product Metadata*
- Press + *New Product Metadata*
- Add the *Name* (this is for CRM purposes only, and is not visible on the portal
- The *Display Name* will however appear on the portal so should be understandable for your customers
- Choose Image for the *Type*
- *Image URL* – the online location of the image, this must be hosted somewhere publicly accessible, e.g. in the Images folder on a Silverbear DNN portal
- *Order* – you can specify an order for the images to appear.
- Press *Save & Close* and repeat for any father images

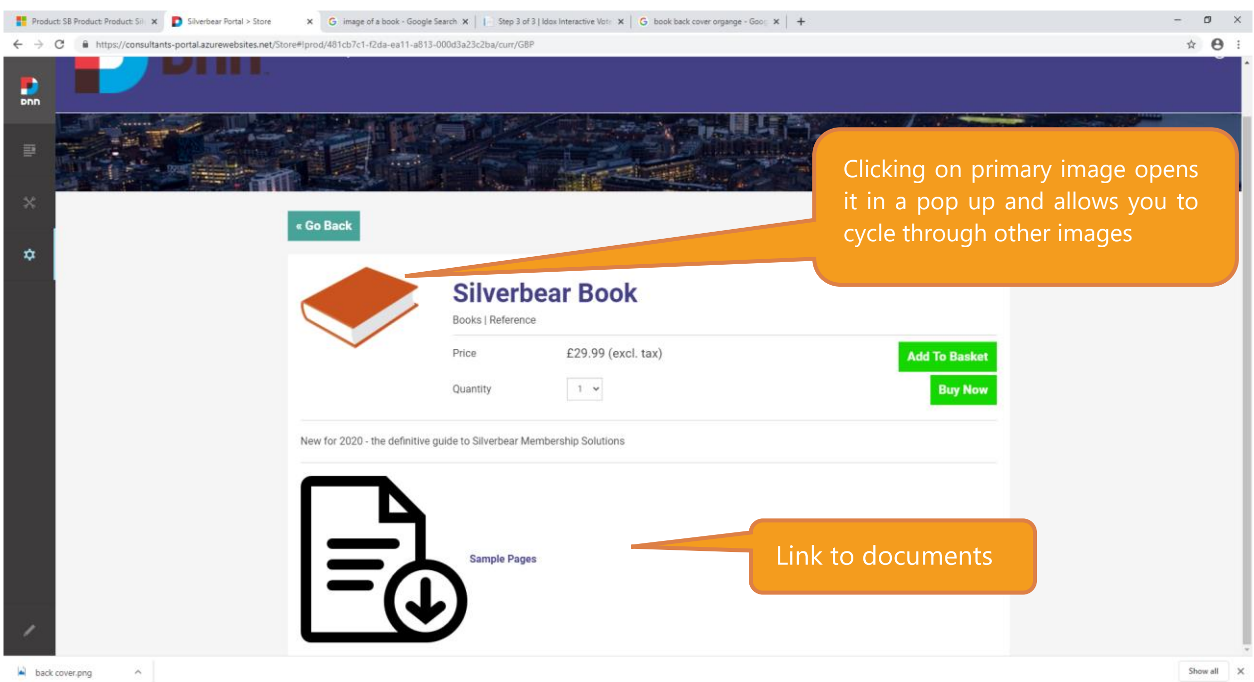


- The images will be shown near and in addition to the main product image. The exact presentation will depend on your portal design. When the user clicks on an image on the web shop, it will be shown in a lightbox with left/right arrows to switch between the images

Adding documents

This is a similar process to the image setup.

- From the product record, choose *Related* and then *Product Metadata*
- Press + *New Product Metadata*
- Add the *Name* (this is for CRM purposes only, and is not visible on the portal
- The *Display Name* will however appear on the portal so should be understandable for your customers
- Choose Document for the *Type*, this will open the *Link URL* field
- *Image URL* should be left blank
- *Link URL* – the online location of the file this must be hosted somewhere publicly accessible, e.g. in the Images folder on a Silverbear DNN portal
- *Order* – you can specify an order for the document to appear.
- Press *Save & Close* and repeat for any further documents
- Any documents associated to a product appear under the product description. Clicking on a document redirects the user to view that document in their browser in a new tab



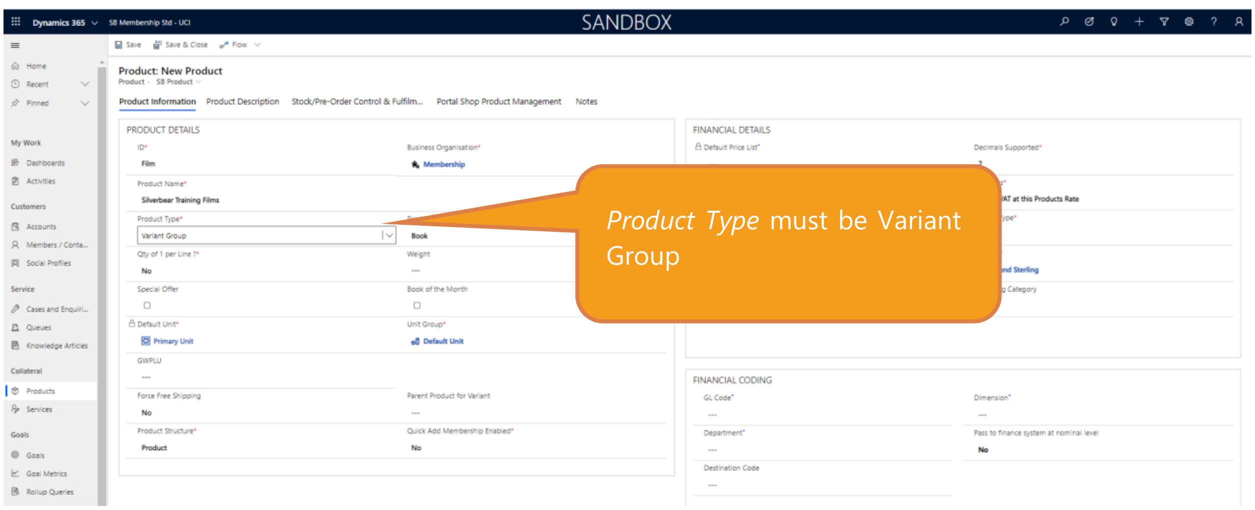
5.6. Product Variants

Product variants you to combine different versions of the same type of product under one parent product in the web shop listing. This will most commonly be used for a single variant (e.g. where a book varies by format, hardback, paperback, digital) but it can handle multiple variants, e.g. a bag that has different colours and sizes.

The following example covers a single variant – format. There are two main steps, create the parent product which is the generic overall type of item that you are selling, and then create the different versions of it; these are the variant products.

Step 1 – create the parent Product.

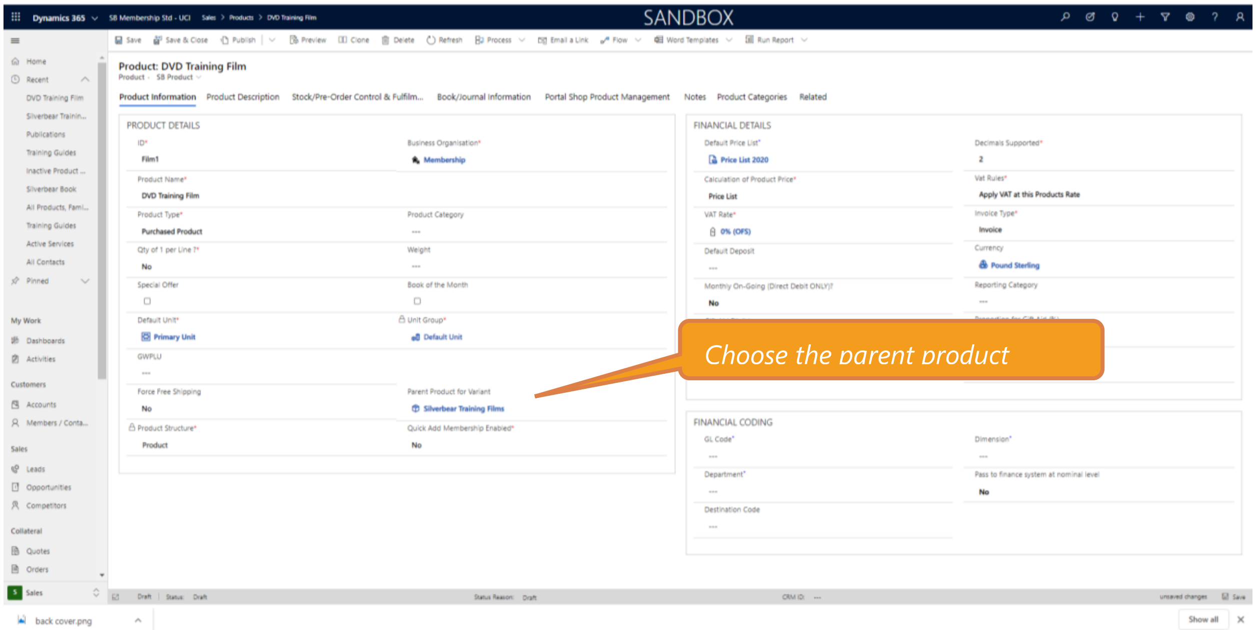
- Create the product in the normal way, except Set the *Product Type* to "*Variant Group*" and do not add this to a price list
- Assign this product to the category and portal where you want it to display so that it can appear on the portal.
- *Save & Close*



Step 2 – create the variant products (the different versions of this product)

Create the products as normal purchased products – including adding them to price lists

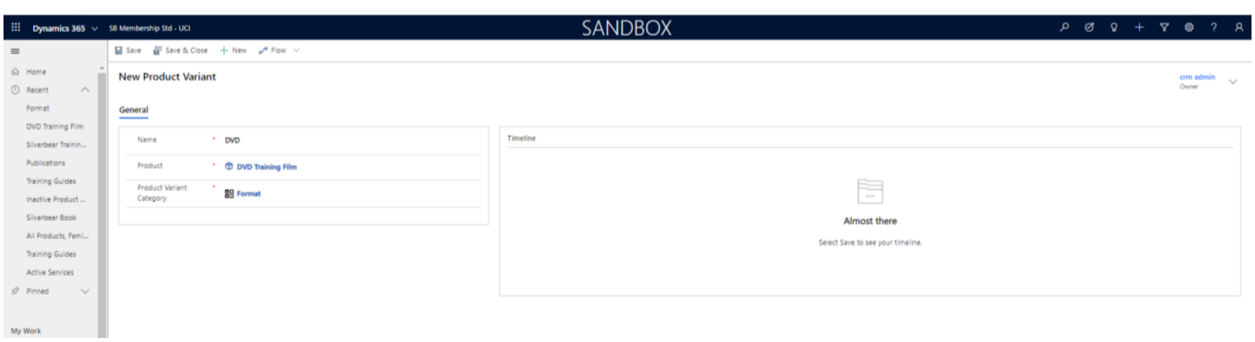
- Assign this product to the same portal as the parent product
- Set up the price list item(s) for this product.
- Do not assign this product to a category, it will take the category of the parent product.
- Set the *Parent Product for Variant* to the parent product previously set up



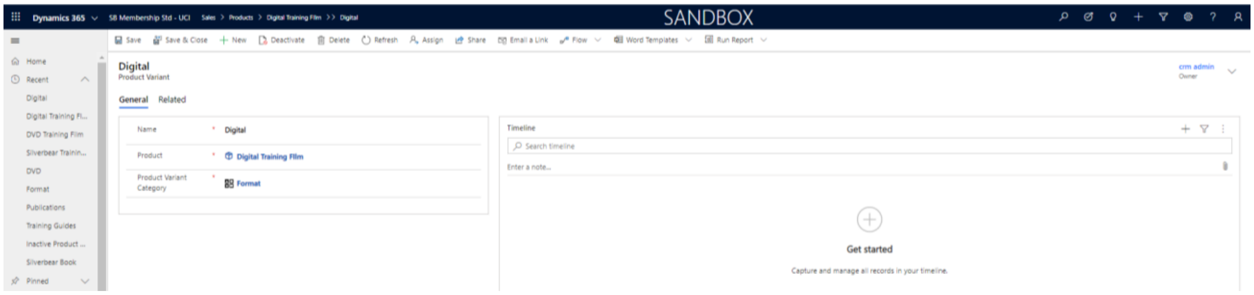
- *Save and Close* and repeat for the other versions

3) Define the Variable

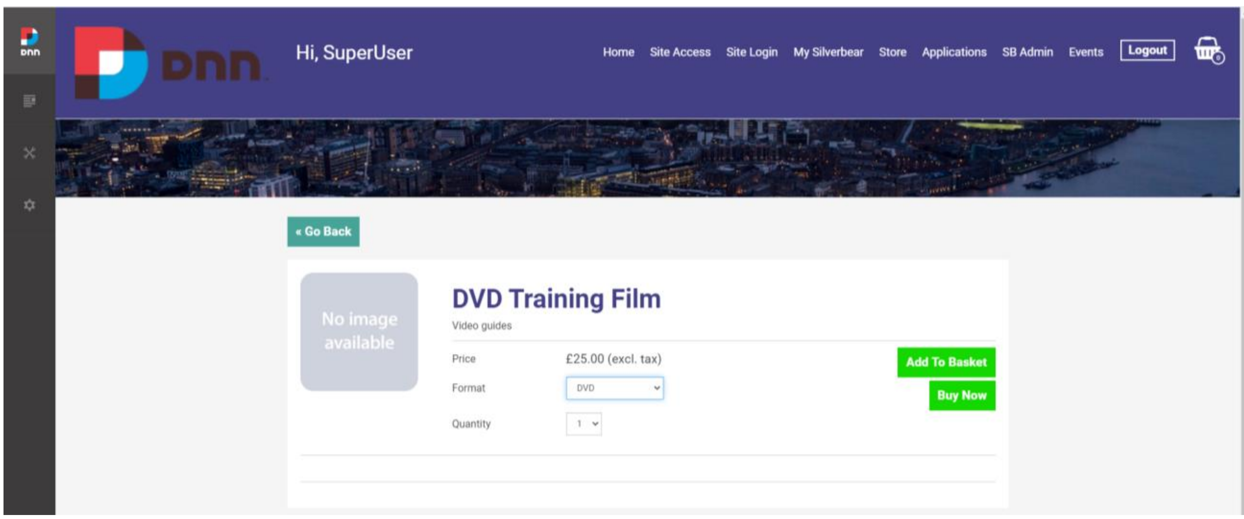
- This defines the way this product is a variant of the parent product, in this case format, but could also be size, colour etc.
- With the product variant record open (in the above example this would be the DVD Training Film), click *Related* and then *Product Variants*
- Press +*New Product Variant* on the toolbar
- Enter the *Name*, this is the version of the variant, in this case DVD
- Now choose the *Product Variant Category*; if this is the first time you are working in this area, you may have to add a new one. In this example a *Product Variant Category* named "Format" has been created
- Press *Save & Close*

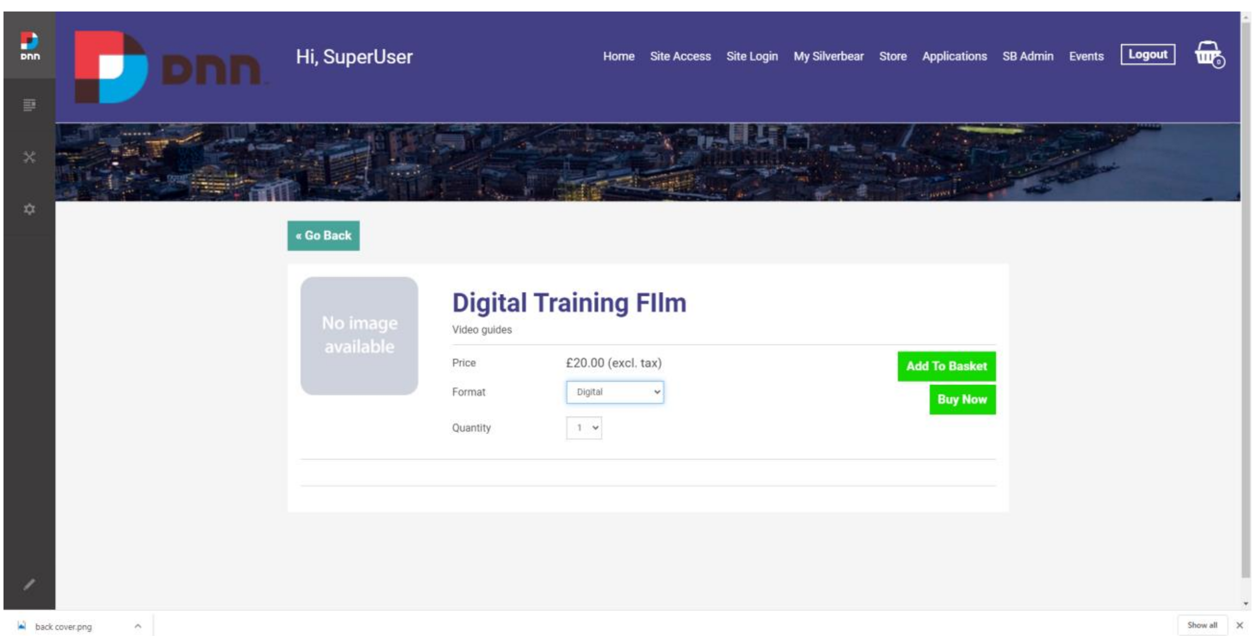


- Repeat this operation for the other variant products, in this case a second product would be the Digital training film with the Name of the variant (the version) as Digital



- *Save & Close* and check your products on the portal
- You should have an option for *Format*, changing the format should change the price

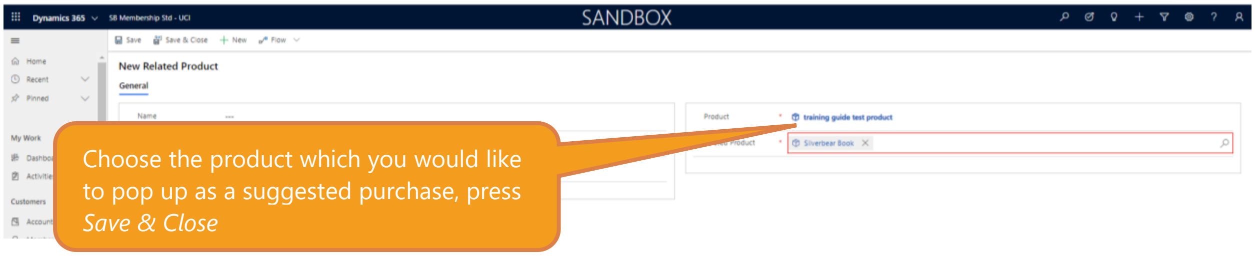




5.7. Related Products

This feature allows you to cross sell products, by connecting products with each other which will then highlight those other products to customers buying one of the items.

- Open one of the products and press *Related*, then *Related Products*.
- Click on the *Add Existing Product* button and find the product you would like to flag when the original one is selected



- Each product will be listed as an item under the main product and depending on the web shop design would normally be displayed as ‘Other customers who viewed this item also purchased.” or similar