

Shop user manual

E-commerce extension for ReadyMembership

Version 1.1

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Changes

Version	Date	Who	Description
1.1	2/Nov/2021	Steve Dowle	Delete product and admin purchase announcements added as part of the payments v3.4.0 release

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Introduction

The shop extension introduces e-commerce functionality into ReadyMembership. Allowing you to make products available for purchase online for your users, and to handle the ordering and fulfilment of these products.

This guide will cover

- How to add and configure products for sale
- How to arrange products on your website
- How to handle and process the fulfilment of orders

At a glance functionality

Product features

- Create unlimited shop products
- Relate additional products to encourage upsell
- Create price variants using targeted rules, allowing you to offer for example different member and non-member pricing
- Bulk pricing allowing you to offer different prices depending on how many you buy

Product display

- Dedicated product pages with friendly URLs
- Faceted listing search
- Widgets allowing you to place products anywhere on the website
- Segmenting of users via rules who have for example purchased certain products, allowing you to retarget them via email or website personalisation based on their history

Tax & Accounting

- Configure which payment methods you will accept
- Xero integration allowing you to assign inventory codes to products
- Specify different tax rates for products and compatible with our digital tax service, so that tax is calculated based on billing location

Fulfilment & Delivery costs

- Create different delivery charge bands based on a combination of total weight/cost and delivery location
- Subscribable admin notifications when orders are placed
- Fulfilment area for physical products allowing you to fulfil an entire or part order
- Automated emails for confirmation of order and fulfilment

Coming in version 2

- Ability for purchasers to see the fulfilment status of their order, and to re-order if required
- Product attributes, for example selling different sizes and colours
- Product collections
- Custom fulfilment types, for example purchasing an online course could immediately grant you access to that on a third party platform or send you a digital ebook
- Ability to maintain stock control for products to ensure you can't order products which are out of stock

Overall shop configuration

Before the shop goes live, there is a small amount of configuration that is required. In the **System settings** select the item called **shop**.

1. **Payment methods** - by default there will be no payment methods specified, so it is vital that at least one payment method is selected. You can select from any of the existing payment methods used across the website.
2. **Billing type** - by default this will be set to **User chooses**. This determines when the customer is going through the checkout payment process, whether they have the ability to choose in what context they are buying for. E.g. if it is a company, then you can add a VAT number but this information isn't relevant if it is a personal purchase. If you are operating purely an organisational membership and everything you sell in the shop is for organisations, then select the **company**. If it is purely a consumer based shop, then select **Personal**.
3. **Related products** - at the bottom of a product page we display any related products that have been chosen. This section determines how this works.
 - a. **Title** - by default this will display You might also like
 - b. **Max items** - the number of products that are displayed at the bottom of the page, it defaults to 4
 - c. **Fill to max with unrelated items** - If you haven't selected any related items for a product or less than the max number here, then we will automatically add additional products to the number of related ones shown. Having this selected will give some consistency to the display, but will potentially display products not relevant to the current product

Global defaults
Default site
Site B

Shop

Payment methods

Stripe: Stripe payments X Invoice: Invoice X

Billing type

☒ **User chooses**
User can choose to bill personally, or to their organisation

☐ **Personal**
Billing details contain no organisation information and assumed billing is for the individual

☐ **Company**
Billing details always contain organisation fields and prefill with contact's organisation if available

Related products

Title

You might also like

Max item

4

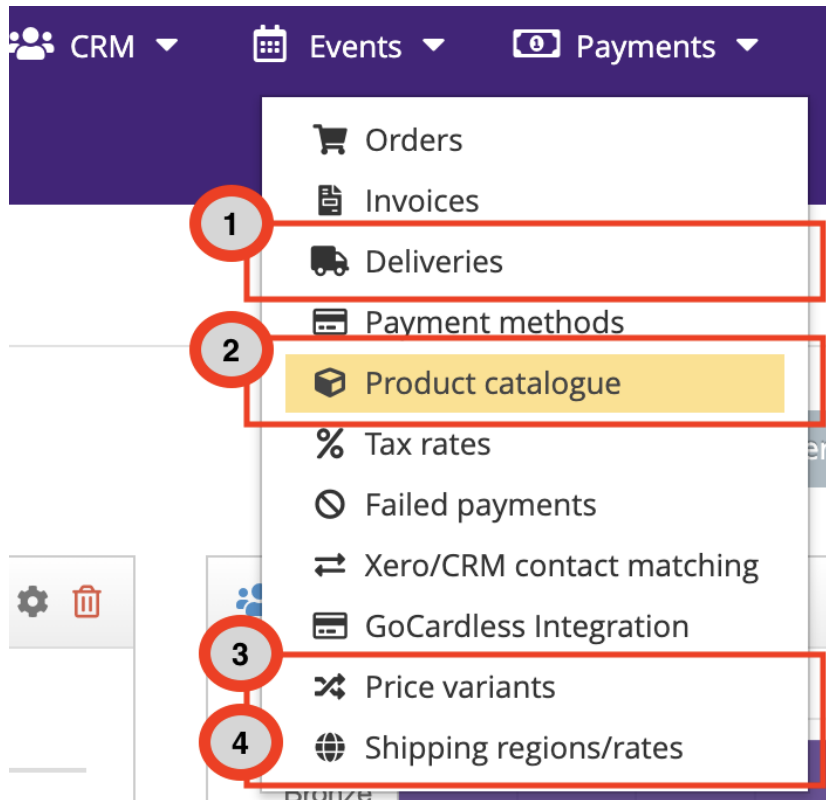
Fill to max with unrelated products?

☒

Save settings

How to add and configure products for sale

In ReadyMembership, day to day management of products and orders are handled via the Payments menu



1. **Deliveries** - Any orders for physical products which require fulfilment are accessed from here. From here you'll be able to see the fulfilment status for orders and mark orders or part orders as being fulfilled
2. **Product catalogue** - Everything specific to individual products is managed via this menu item. This will determine whether the product is visible in the shop and attributes such as price and overall product information.
3. **Price variants** - This menu item sets the overall segmentation of pricing differences for different types of user or situation, e.g. Member special pricing
4. **Shipping regions/rates** - This controls how much you charge for shipping based on region and/or weight and order value

Creating a simple product

1. From the **Payments** menu, select the menu item **Product Catalogue**, you'll then see a list of existing products which can be edited & cloned
2. Click the **Add product** button to create a new product. Depending on any customisations you may also see different types of products that can be created, but by default only the Standard product will be available

Home > Products









Products » Catalogue of products for use in invoices

+ Add Product
 Standard
 Brightspace course

Search Product...

Ungrouped

Manage filters... | Advanced filter

<input type="checkbox"/>	Product name	Type	Status	Category	Default price	
<input type="checkbox"/>	Digi Book	Standard	Live	Advertising	100.00	   
<input type="checkbox"/>	Digi Product	Standard	Live	Advertising	100.00	   

3. You'll see 2 tabs on the product page. The first tab - **standard config**, will need to be completed regardless of whether your product is available in the shop, and the shop tab only needs to be completed if you intend to see the product via the shop.

a. Standard config tab

[+ Add Product](#)

Standard config
Shop

Product Details

Product name *

Status *

☐ **Draft**
Draft products only appear for logged in admin users. Use this status to get your product ready for sale before changing to Live status.

☒ **Live**
Live products appear for everyone

☐ **Archived**
Archived products cannot be ordered and are preserved for historic reference only.

Category *

Default price *

Xero inventory item

Variable/bulk pricing

Bulk pricing

Tax

Set a specific tax rate or choose "Digital product". When choosing "Digital product", the tax rate will be calculated dynamically based on a number of factors, including the purchaser's billing address location. If in doubt, talk with your accounting team.

Digital product
☒

Prices include tax?
☒

Tax rate

Physical

Tag a product as a physical product when the product **requires delivery**. Orders will require a delivery address for physical products.

Is physical product?
☒

I want to add another Product
☒

- i. **Product name** - if you're selling this in the shop then this will also be the title that will be displayed
- ii. **Status** - Only **live** products can appear in the shop. If you are in the process of setting up a new product, then we'd recommend keeping it as draft until it is ready to go live. **Draft** products can be seen in the front-end of the shop by logged-in admins, but regular users will not be able to see it. If you are no longer selling the item, then mark the status to **Archived**
- iii. **Category** - Used to classify similar products. Start typing to select an existing category or just hit enter to create a new category. The category will be displayed as a facet option on the shop homepage.
- iv. **Default Price** - you can further configure a product to have different prices, but this is the standard price that visitors will see. The value

entered here will be in whatever currency the shop has been configured overall for.













- v. **Xero Inventory Item** - this field will only appear if you have the Xero extension installed, and allows you to set what inventory item and nominal code is used when the invoice line item is created in Xero.
- vi. **Bulk pricing** - this allows you to set different prices depending on how the quantity is being purchased. This and variable pricing will be covered in more detail in later sections
- vii. **Tax** - the tax options shown here are common to how they are implemented on Eventfolio tickets and subscriptions. If the product has tax that needs to be applied then you can select it from the dropdown. If you have the **digital tax** feature installed, then you can also choose what type of digital product it is, and then the tax will be calculated during the checkout process based on the billing address of the customer.
- viii. **Physical product** - If this product requires delivery, then check this option. You can optionally add a **SKU** code, and if you charge delivery based on weight then enter the weight in KG for a single item in the **Product weight** field

- ii. **Teaser** - this field is displayed on the homepage, so is recommended to keep it succinct
 - iii. **Images** - you can add as many images as you wish, the first image will be used on the homepage and product widgets, and on the detail page all images will be displayed as a carousel. You can drag and drop the images in order to change the order in which they display.
 - iv. **Description** - this will appear on the product page under the images. This can include any rich content including widgets
 - v. **Sidebar content** - Any copy added here will appear above the price and it is recommended that this copy is kept short in order to keep the price and action buttons highly visible.
 - vi. **Purchase rules** - by default anyone can purchase any product that appears on the shop at the default price, however you can use a **condition** to prevent purchase, and then add an optional **unqualified message** that explains why they don't qualify. Note though, the shop product will still appear on the site, so if you have a rule for example that checks if today is friday, then you'll still see the product on friday, you just won't be able to purchase it.
 - vii. **Related products** - If customers often purchase additional products when making a purchase for a particular product, or there are other products similar to the one being viewed, then you can add these as related products. When a customer is viewing the product page, then at the bottom of the page, these products will then be listed here, in the order in which they were chosen.
4. Click **Save Changes** to add your new product, and if you have configured it to be live, then it will immediately be available on the website

Deleting a product

If you have created a product in error or it is no longer needed, then you are able to delete it as long as it hasn't been used in an order. If it has, then you'll need to delete the order before you can delete the product. This is to ensure that data integrity is maintained.

To delete a product simply click on the *bin* icon next to the appropriate product on the product listing page, or when you view the product you'll see a red delete button. If the product has been used then the *bin* icon will be greyed out, and the delete button will not appear on the product detail screen.

<input type="checkbox"/>	a physical product with many pricing variants and conditional purchase rule	Standard	Live	Books	25.99	  
<input type="checkbox"/>	Retention Point: The Single Biggest Secret to Membership and Subscription	Standard	Live	Books	11.99	  
<input type="checkbox"/>	2020 Homecare handbook	Standard	Live	Carehome materials	14.99	  
<input type="checkbox"/>	iPhone	Standard	Archived	Electronic goods	500.00	  

Offering products that have different prices for members or other criteria

Often you may wish to add different prices for products depending on whether the customer is an active member or not. To accomplish this we need to set up a pricing variant, and then update the product and add the variant price.

1. From the **Payments** menu, select the menu item **Price Variants**, you'll then see a list of existing price variants which can be edited & deleted, and sorted in how they appear on the website













[Home](#) > [Price variants](#)

Price variants » Define ways in which your pricing will be segmented per shop product

[Sort records](#) [Add Price variant](#)

Search Price variant...

No filters have been created for this view. Use the advanced filter and hit the "Save for later" button to save filters that can be shared with your team. [Manage filters...](#) [Advanced filter](#)

<input type="checkbox"/>	Internal label	Priority	Display label	Condition	
<input type="checkbox"/>	Members price	6	Members price	Members	   
<input type="checkbox"/>	VIP Price	7	VIPs	VIP Price for Year 2021	   
<input type="checkbox"/>	Super special price	8	Students	Students	   




Showing 1 to 3 of 3 records, results per page: 10

[Export data...](#) [«](#) [1](#) [»](#)

2. Click the **Add price variant** button to create a new variant.


[Home](#) > [Price variants](#) > [Members price](#) > [Edit record](#)

Edit Price variant, 'Members price'

Internal label *	Members price
Display label *	Members price
Condition *	Members   

 Cancel  Save changes

- The **internal label** and **display label** are pretty self explanatory, however it is recommended to keep the **display label** field to as short a title as possible if you intend to offer bulk pricing, in order for the pricing grid on the detail page to look compact.
 - Condition** - This is the crucial element of the pricing variant, as this determines under what conditions a customer can qualify for this price. This uses standard rules, so it could be if the logged in person has an active membership subscription or based on previous purchases, or time based such as if it's black friday week.
 - Click **save changes**
- Once you have set up pricing variants, then these are then available when adding or editing all products. So to enable a particular product to have an optional price variant
 - Edit (or add) the product via menu item **Product Catalogue**
 - When you now go to the Variable/bulk pricing section for the product, you'll notice each one of the price variants listed here. If you wish to offer a price for that variant then enter it, and otherwise leaving it blank will mean that product doesn't support that variant.

Variable/bulk pricing	
Members price	400 
Bulk pricing	 
Tax	

- When you click save changes for the product and then look at the product in the front-end, you'll now see that it will include the additional pricing options

£500.00, or Members price **£400.00**

Quantity:

Add to basket 

Auto pricing variant recalculation at checkout

It is important to note that the customer's basket price will be updated according to the price variants they qualify for automatically if they only login during the checkout process. **For example**, a member isn't currently logged in to the website, but adds a product for £500. When they go through the checkout process, they login and at that point the system knows they are an active member, and therefore they now qualify for a discounted price of £400 for the item, so their basket is updated now to show the adjusted total price.

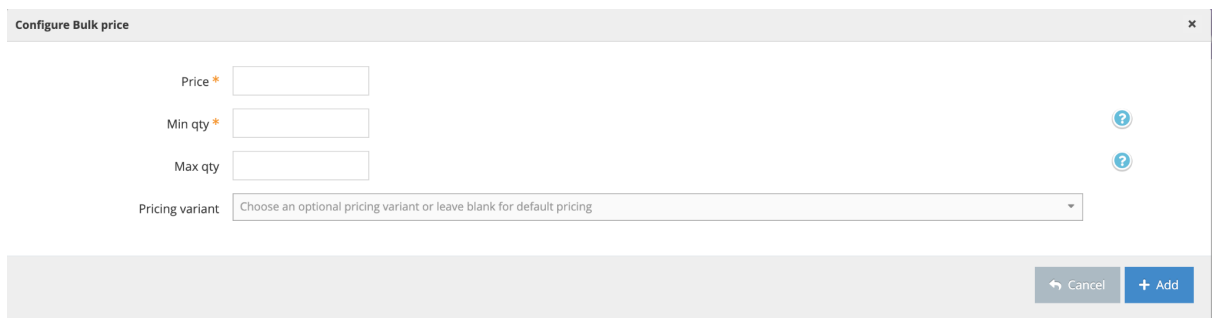
Creating product discounts for purchasing in bulk

By default if you purchase additional quantities of a product, then the customer will be charged the same amount for each item. You can however configure products so that different prices can be charged for buying multiples of an item.

1. From the **Payments** menu, select the menu item **Product Catalogue**, and then choose the product you want to setup bulk pricing for
2. Under the variable/bulk pricing section, you'll see the **bulk pricing** multi-selector field with a quick add button



3. Click the + button



- a. **Price** - the price if they qualify for this bulk price
 - b. **Min qty** - this must be at least 2 and cannot overlap an existing bulk entry for this product
 - c. **Max qty** - this must be at least 2 and cannot overlap an existing bulk entry for this product. You can leave this field blank, which would mean there is no maximum purchase quantity, and it would be displayed as 99+ for example on the product page
 - d. **Pricing variant** - an optional pricing variant, so you would only qualify for this bulk price if you meet the condition of the pricing variant
4. Continue to add all bulk rates, and it is recommended that you complete bulk pricing for each of the quantity ranges and pricing variants you want to offer. For example,

below we have bulk pricing for regular and member rates for 2-10, and 11 or more

Variable/bulk pricing

Members price
?

Bulk pricing

2-10: £450.00 ✕
11+: £400.00 ✕
2-10 (Members price): £390.00 ✕
11+ (Members price): £350.00 ✕

+

?

Tax

- Click save changes, and when you view your product on the front-end of the website it will now show a grid of the bulk pricing options

Qty	Rate	Members price
2 - 10	£450.00	£390.00
11 +	£400.00	£350.00

Quantity:

⬆
⬇
⬆

Add to basket 

How do I charge shipping for an order?

If you sell physical products which need delivery, then you can optionally set up shipping rates to control how much customers are charged.

The delivery charge is calculated during the checkout payment process when the system knows what the delivery address for the customer will be.

You can define regions for countries and then within a region you can define weight or order cost bands which have a particular delivery charge.

For example, if you are a UK based organisation, then you might want to have free delivery in the UK, but charge different amounts for shipping to Europe and the Rest of the World, depending on how much the entire order weighs. You might alternatively want to incentivise shoppers to spend more, by offering free UK & European delivery if they order over £100 but only offer free worldwide delivery if they spend over £150

To set up shipping regions

1. From the **Payments** menu, select the menu item **Shipping region/rates**, you'll then see a list of shipping regions which can be edited

Home > Shipping regions/rates

Shipping regions/rates >> Configure shipping regions and shipping rates

[+ Add Shipping region](#)

Search Shipping region...

No filters have been created for this view. Use the advanced filter and hit the "Save for later" button to save filters that can be shared with your team. [Manage filters...](#) [Advanced filter](#)

<input type="checkbox"/> Region/rate name	Pricing method	Date last modified	
<input type="checkbox"/> East Asia	Price	20 Aug 2021 09:51:30 AM	View Edit Copy Delete Refresh
<input type="checkbox"/> Other Parts of the World	Weight	23 Aug 2021 11:53:21 AM	View Edit Copy Delete Refresh
<input type="checkbox"/> North America	Price	25 Aug 2021 08:15:04 AM	View Edit Copy Delete Refresh
<input type="checkbox"/> Europa	Weight	23 Aug 2021 03:03:34 AM	View Edit Copy Delete Refresh

Showing 1 to 4 of 4 records, results per page: 10

[Export data...](#) [«](#) [1](#) [»](#)

2. To create a new region, click the add shipping region button

[+ Add Shipping region](#)

Region

Region/rate name *

Countries

Pricing

Pricing method * ☒ **Weight**
Shipping prices are calculated based on the total weight of the items to be delivered.

☐ **Price**
Shipping prices are calculated based on the total cost of all items in the shopping basket.

Rates [+](#)

Tax

Prices include tax? ☒

Tax rate *

I want to add another Shipping region ☒

[Cancel](#) [Add Shipping region](#)

- a. **Region/rate name** - this title is displayed to the customer
- b. **Countries** - You can select any number of countries, however a country can only be used in one shipping region.

- c. **Pricing method** - You can set shipping rates either by the total amount the customer has spent, or based on the total weight of the order. Make sure if you are basing it on weight, that you have correctly assigned a weight to each product.
 - d. **Rates** - These determine the band ranges for the pricing method chosen and the according shipping charge. This will be covered in detail in the next section.
 - e. **Tax** - Some carriers do not charge tax, and some only charge tax if the delivery is going outside a territory.
3. Click the **Add shipping region**, to save the details

To set up region rate costs

Before we explain how to set things up, we'll show you a few examples of how you could configure costs

Example 1

You charge a shipping fee if the order value is less than £100, but for orders over £100 you offer free delivery

Pricing

Pricing method * ☐ **Weight**
Shipping prices are calculated based on the total weight of the items to be delivered.

☒ **Price**
Shipping prices are calculated based on the total cost of all items in the shopping basket.

Rates +

Example 2

You charge based on weight, an order with a total weight up to 2kg in weight costs £4, between 2 and 20kgs you charge £10, and anything above 20kgs you charge at flat fee of £20

Pricing

Pricing method * ☒ **Weight**
Shipping prices are calculated based on the total weight of the items to be delivered.

☐ **Price**
Shipping prices are calculated based on the total cost of all items in the shopping basket.

Rates +

Setting up the rates:

1. From the **Payments** menu, select the menu item **Shipping region/rates**, then edit the shipping regions you want to set the shipping rates for
2. Under the pricing section, you'll see the **Rates** multi-selector field with a quick add button

Pricing

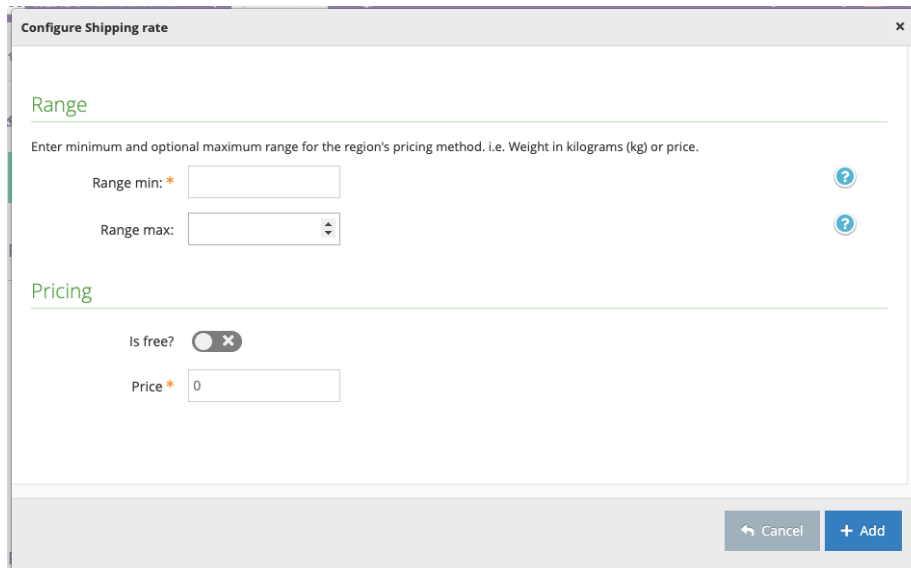
Pricing method * ☒ **Weight**
Shipping prices are calculated based on the total weight of the items to be delivered.

☐ **Price**
Shipping prices are calculated based on the total cost of all items in the shopping basket.

Rates +

Tax

3. Click the + button



Configure Shipping rate

Range

Enter minimum and optional maximum range for the region's pricing method. i.e. Weight in kilograms (kg) or price.

Range min: * ?

Range max: ?

Pricing

Is free? ☐ x

Price *

- Range min** - this value cannot overlap any existing shipping bands you currently have setup
 - Range max** - This isn't a required field, and if left blank then it effectively means anything greater than or equal to the Range min for this range. Do make sure this value doesn't overlap any existing shipping bands you currently have setup
 - Is free?** - if you don't want to charge for delivery for this band, then check this option
 - Price** - If it isn't free, then add the amount you are charging for this band (*it uses the same currency as the shop default*)
4. Continue to add all pricing ranges, then click **save changes** when you have finished

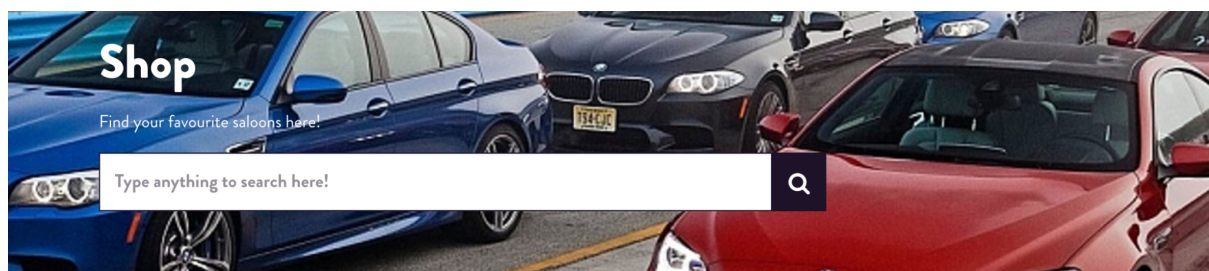
How to arrange products on your website


When the shop extension is initially installed, it will create a default shop homepage in the site tree. This can be renamed, moved etc just like any other page on the website

▼ Shop	✎ + Shop homepage	🟢 Published	🔒 Unrestricted	🔗 shop.html
▶ 🛒 My basket	✎ Shopping basket	🟢 Published	🔒 Unrestricted	🔗 basket.html
▶ 👤 Member homepage	✎ + Member homepage	🟢 Published	🔒 Unrestricted	🔗 crm-member-ho...

Shop homepage & listings page


By default the shop page will display a faceting list of all of the active products, which can be keyword searched and category faceted, and above this will be any specific content that has been added into the page





Cartimandua's Capital?: The late Iron Age Royal Site at Stanwick, North Yorkshire, Fieldwork and Analysis 1981–2011

From: £40.00



2020 Homecare handbook

From: £14.99

Category

- ☐ Advertising (5)
- ☐ Council For British Archaeology 2021 (1)
- ☐ Electronic goods (1)
- ☐ Gaming (6)
- ☐ Research Reports (1)
- ☐ Seals (1)
- ☐ Vehicles (7)
- ☐ ...

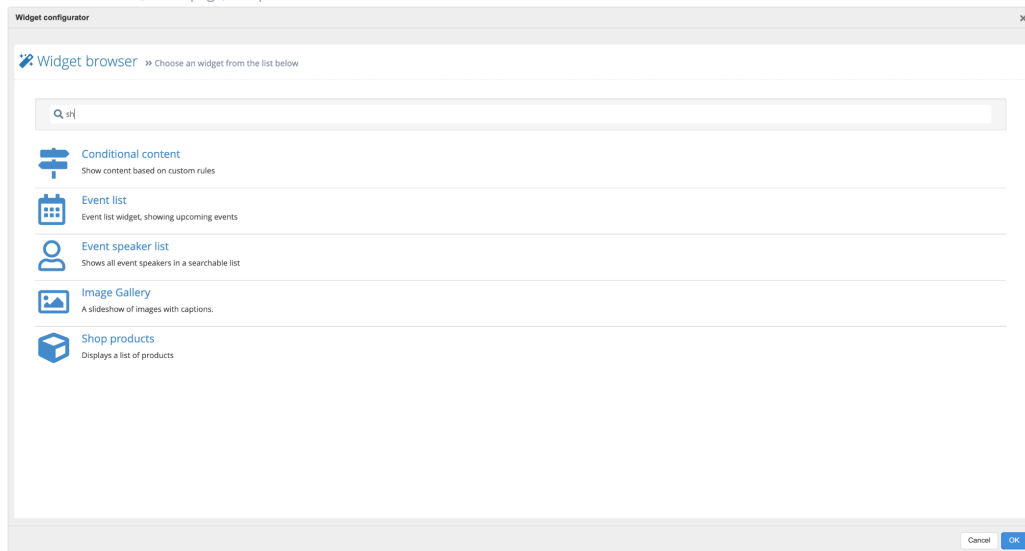
If you want to promote some shop items rather than them just appearing in the search results, then you can use the new shop products widget or any other content, and this will then appear before the listings.

Once the visitor does a keyword search or selects a category facet, then only the listings will now display, so the focus is now directed to search for products.

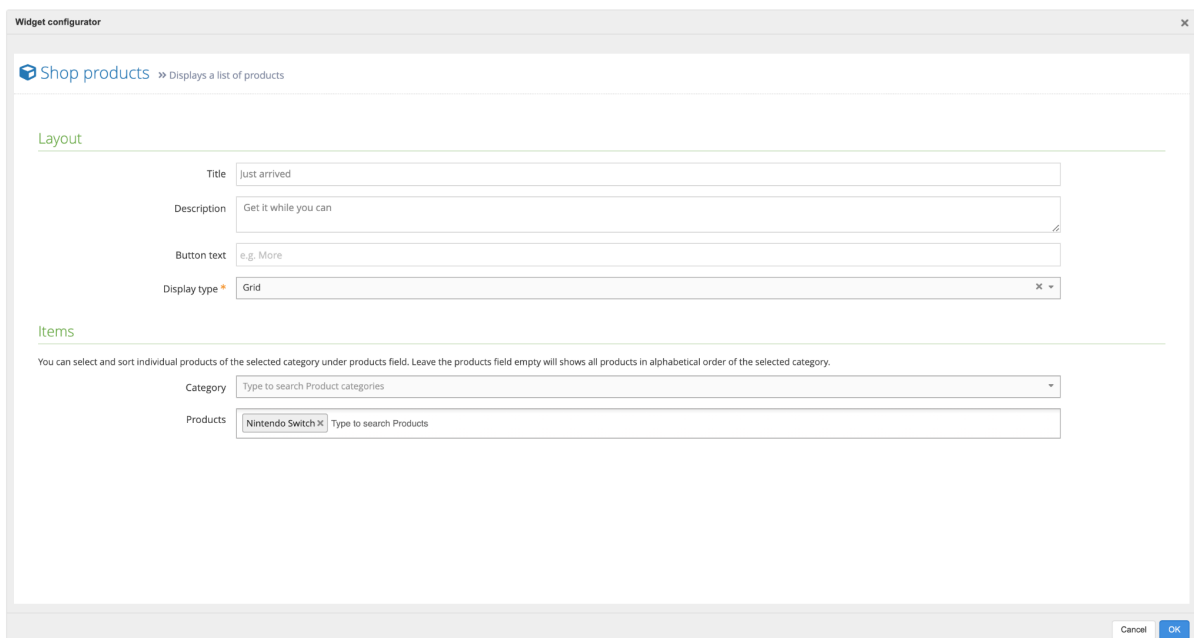
Shop products widget

The new shop products widget can be dropped into any page on the website, not just within the shop area.

Within a rich editor, now when you click the button to add a widget, you'll now see this as available



There are a number of configuration options available in the widget



1. **Title** - displayed as header text when the widget is displayed
2. **Description** - displayed underneath the title

3. **Button text** - if you have selected a category, then a button will appear which will link to the search results displaying all shop items belonging to that category. By default this will display Show more, but you can override this
4. **Display type** - By default products will be displayed in a **grid** style, with one product displayed under the next, but all the selected products will be displayed. You can also select **carousel** as a display type, in which case it will display as a slider and auto slide to the other products
5. **Items** - you can either select a category in which case all the active products in the category will be displayed, or you can select specific products.

How to handle and process the fulfilment of orders

You are able to see a list of all of your orders which require delivery in order to fulfill them. From the **Payments** menu, select the menu item **Deliveries**, to see all of the orders.

[Home](#) > [Orders](#) > [Orders for delivery](#)































Orders for delivery

Status

Ungrouped

Manage filters...

Advanced filter

#	Order for	Status	Delivery status	Owner	Date created	
ORD-03320	 Shop	✓ Completed	⚠ Pending	 Elon Musk	23 Sep 2021 05:17:31 AM	
ORD-03318	 Shop	✓ Completed	⚠ Pending	 Elon Musk	22 Sep 2021 01:30:51 PM	
ORD-03284	 Shop	✓ Completed	⚠ Pending	 Elon Musk	20 Sep 2021 08:33:26 AM	
ORD-03265	 Shop	🛒 Drafted	⚠ Pending	 Gino Pease	15 Sep 2021 11:15:41 AM	
ORD-03264	 Shop	✓ Completed	⚠ Pending	 Denver Mayans	15 Sep 2021 11:11:40 AM	
ORD-03263	 Shop	✓ Completed	⚠ Pending	 Moka Fang	15 Sep 2021 11:09:38 AM	
ORD-03254	 Shop	🛒 Created	⚠ Pending	 Rick Slow	14 Sep 2021 09:36:38 AM	
ORD-03242	 Shop	🛒 Drafted	⚠ Pending	 13-9-1 Test	13 Sep 2021 04:51:37 PM	
ORD-03243	 Shop	✓ Completed	✅ Delivered	 Steve Dowle	13 Sep 2021 04:01:03 PM	
ORD-03241	 Shop	✓ Completed	✅ Delivered	 13-9-1 Test	13 Sep 2021 02:08:03 PM	

Showing 1 to 10 of 19 records, results per page: 10

Export data...
1
2

All orders which were generated via the shop will have a **status** of Completed. You can also create orders via the admin for situations where maybe the order was placed over the telephone, so these would typically be in a state of Created until you have confirmed that payment has been made.

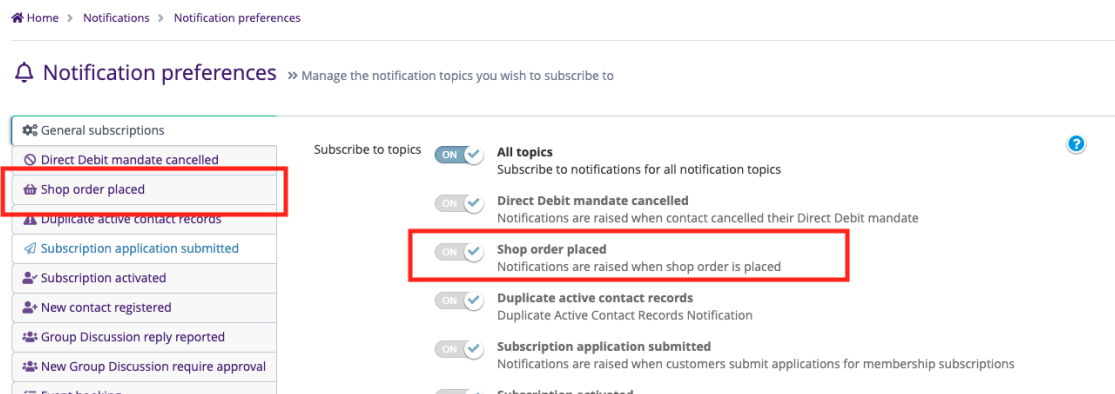
The Delivery status has 3 possible values:

1. **Pending** - the order has yet to be fulfilled
2. **Part-delivered** - at least one of the items on the order still needs to be fulfilled.
3. **Delivered** - the entire order has been fulfilled.

How to be alerted when a shop order is placed

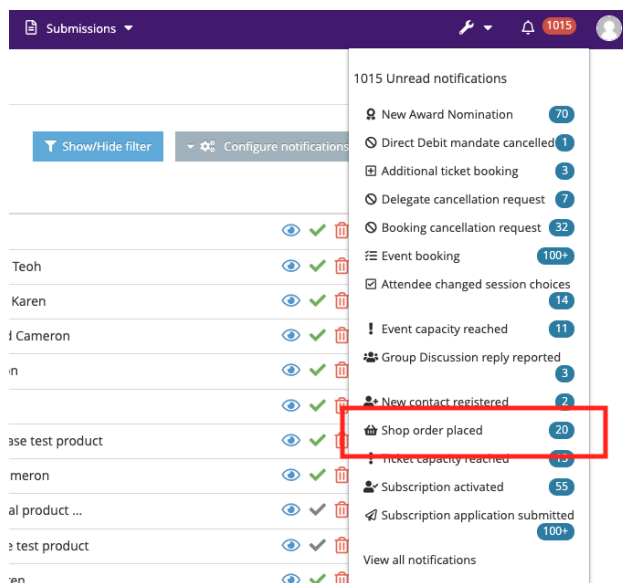
Using the Admin Notifications, you can configure the system so that you receive an alert when a shop order is placed. As with any notification this can simply be displayed on the admin menu, or you can subscribe and receive an email notification.

To access your notification setting, under your logged-in image on the top-right corner of the admin menu, go to **edit profile and settings**, and then select the tab called **Notifications**.



Simply check the option next to the label that says **shop order placed**, and if you want to subscribe and receive an email notification, then select the **shop order placed** tab, and select you want to receive an email.

Once this has been done, you'll see a notification when orders are placed, and then clicking on the notification, you'll see some details of the order, which then links to the actual order itself



 Mr Elton John has placed an order for Nintendo Switch

Order details:

Customer	Mr Elton John
Date ordered	13 Oct 2021 09:02:51 AM
Items	Nintendo Switch
Delivery	 Pending

[View order details](#)

Fulfilling an order

To fulfil either the whole or part of the order

1. Click on the order you wish to fulfill from the **Orders for delivery** screen
2. Select the delivery tab
 - a. **Items to deliver** - On the left hand side of the screen you'll see a list of all of the items contained in the order. By default all of these will be set to be fulfilled, however if you are not able to fulfill all of these items at once, then change the value next to the corresponding one to Zero.
 - b. **Service** - select the courier you are using for this, or use the quick add in order to create one
 - c. **Shipping date** - this will default to today's date, but can be changed
 - d. **Tracking number** - this optional field allows you to enter a tracking number, which will be displayed in the email the customer receives
 - e. **Tracking link** - this should be the full URL link that the courier provides you with. This will be displayed as is on the email, and in version 2 within the orders section.
 - f. **Send delivery notification email** - if checked the customer will be sent a system email with the fulfilment details. The system email is named *Order delivery notification* and the copy can be edited via the **Email / System email** menu item.
3. Click on the **Deliver items** button to complete the fulfillment process

ORD-03264

✓ Completed

Shop

Dr Denver Mayans

✓ Fully paid

+ Created a week ago

Updated a week ago

Order details
Invoices
Payments
Delivery

Make a delivery

Items to deliver

Nintendo Switch

1 of 1

Service and tracking info

Service *
Type to search Delivery services
+

Shipping date *
2021-09-27

Tracking no.

Tracking link

☒ Send delivery notification email

Deliver items

Customer journey

Unless there are any access restrictions on the products, customers will be able to add any number and quantity of products to their shopping cart.

If they are logged in, then these items will persist in their basket. So if they return to the website later and login, then their shopping basket will be recovered.

When viewing their **shopping basket**, a customer can remove products and adjust the quantity for each item. The total price is updated to reflect these changes and any adjustments due to bulk pricing is made.

Once they then begin the **checkout process**, they will be asked to login or register. Once they login, the system will go through the items in their basket and automatically adjust the price if they meet any of the pricing variant conditions.

Depending on the overall shop configuration, the customer may be asked in which context they are purchasing the item, as in on behalf of an organisation or personal. The customer will then be guided through adding **billing information** which may be prefilled depending on

the information held on the customer. If they are purchasing any products which are physical then a delivery address will need to be entered. By default this will be the same as the billing address but can be changed.

If they have ordered any **digital products** and the digital tax feature in ReadyMembership is turned on, then their order will be updated with any additional tax that is payable based on the customer's billing address.

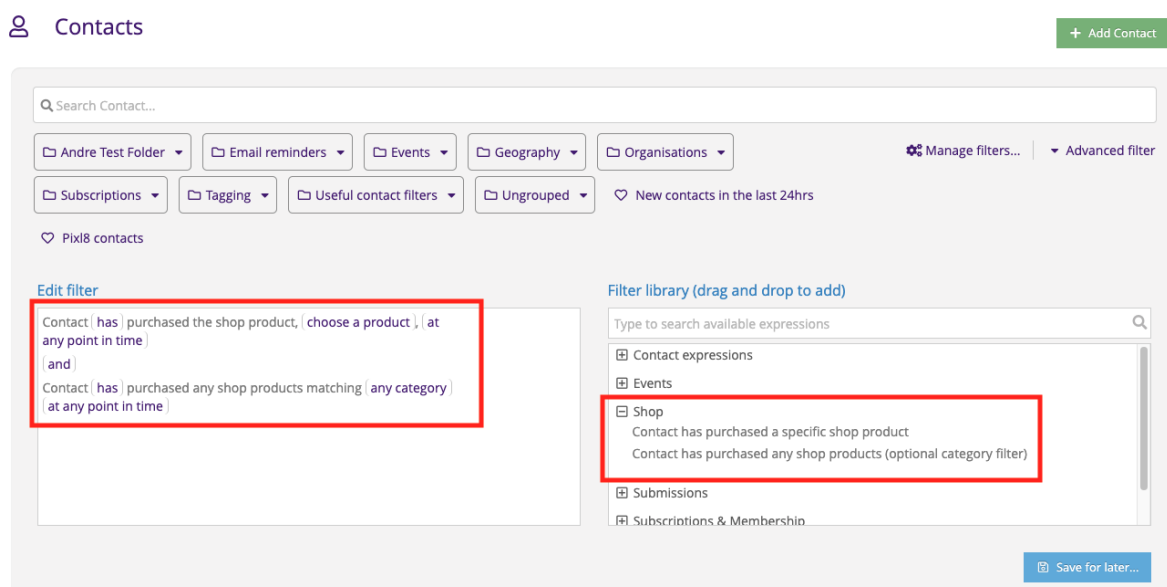
If applicable, once the **delivery address** has been confirmed, then any **delivery charges** will be calculated and the order updated to reflect any additional charges.

Finally once the order has been confirmed by the customer, then alongside a confirmation message a system email named **Shop checkout confirmation** in the admin will be sent to the customer confirming the order. An admin notification will also be raised, alerting any admin subscribers that an order has been placed.

An order in the system will have been generated, and depending on the configuration of invoices, typically if payment was made, then an invoice will have been created as well. These orders & invoices are available to customers via their member area in the same location as any others made.

Targeting customers

There are 2 new rule expressions which will allow you to target customers who have purchased particular items or items belonging to a particular category.



The screenshot shows the 'Contacts' management interface. At the top, there's a search bar and a '+ Add Contact' button. Below the search bar, there are several filter categories: Andre Test Folder, Email reminders, Events, Geography, Organisations, Subscriptions, Tagging, Useful contact filters, Ungrouped, and a heart icon for 'New contacts in the last 24hrs'. A 'Manage filters...' button and an 'Advanced filter' dropdown are also present.

The main area is divided into two sections. On the left, under 'Edit filter', there are two filter rules highlighted with red boxes:

- Contact (has) purchased the shop product, (choose a product), (at any point in time)
- (and)
- Contact (has) purchased any shop products matching (any category) (at any point in time)

On the right, under 'Filter library (drag and drop to add)', there's a search bar and a list of filter categories. The 'Shop' category is highlighted with a red box, showing two filter expressions:

- Contact has purchased a specific shop product
- Contact has purchased any shop products (optional category filter)

At the bottom right, there's a 'Save for later...' button.

Some of the many uses for this would to allow you to:

- Send an email to all customers who have purchased anything from the shop over the last year, to let them know of your new product range
- Restrict areas of the website only to those customers who have purchased a particular product
- Send an email to all customers who purchased a previous version of a product, to let them know that a new version is now available.
- Use conditional content on the homepage to recommend some related products to one they have purchased.

Going live

Go live checklist

Completed	Task	Where to find in the manual
<input type="checkbox"/>	Add at least one payment method	Section <i>Overall shop configuration</i>
<input type="checkbox"/>	Added and made active all shop items	Section <i>Creating a simple product</i>
<input type="checkbox"/>	Setup and applied any pricing variants if you offer discounts for members	Section <i>Offering products that have different prices for members or other criteria</i>
<input type="checkbox"/>	Setup and applied any bulk pricing if you offer discounts for larger quantities	Section <i>Creating product discounts for purchasing in bulk</i>
<input type="checkbox"/>	Setup delivery costs, and ensured that if you charge by weight, that all products have a weight added.	Section <i>How do I charge shipping for an order?</i>
<input type="checkbox"/>	Confirmed the copy for the system emails <i>Shop checkout confirmation</i> and <i>Order delivery notification</i>	See system emails in the admin