

2. Membership Program User Guides

Thank you for purchasing my extension. If you have any questions that are beyond the scope of this help file, please feel free to email via my user page contact form here. Thanks so much!

Created: 14/06/2016 | By: Magenest | Email: support@magenest.com | Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/13>

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Introduction

Magento 2 Membership Program developed by Magenest is a powerful tool which brings many benefits for both the owner store and customers.

On the one hand, it is true that membership program is extremely valuable for the business. Nowadays, many business such as health clubs or gym center use membership programs. They consider it as one of the important strategy business because membership programs actually bring a stable source of income and high profits for their business. On the other hand, those also give customers a variety of choices so that they can easily choose a suitable membership type. Therefore, they can save a significant money through the promotion policies given by the providers.

Features for admins

- Create and manage membership rules.
- Set rule name and discount condition for customers
- Create and manage membership plans.
- Manage member in the same membership plan.
- Manage membership purchase history.
- Set to upgrade price determined.

Features for customers

- Manage their membership.
- Membership upgrading an easy way.
- Providing friendly user interface.
- Save significant money when customers use the membership programs.

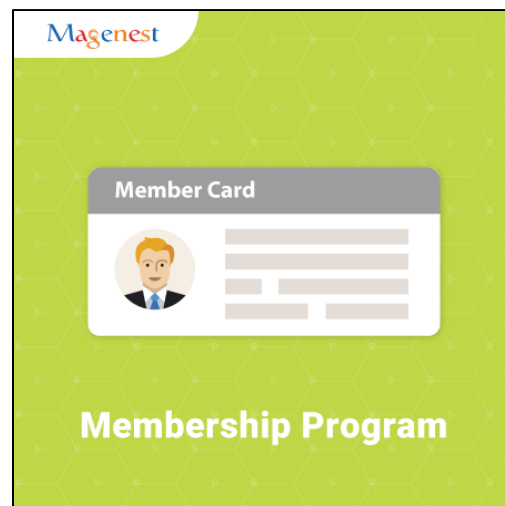
System Requirements

Your store should be running on Magento version 2.0.1 and more.

Configuration

To set configuration, navigate to **Stores > Configuration > Magenest Membership**, consist of: **Plan Configuration**.

Plan Update Options:



At this tab, admin will set how to upgrade a membership when customers wish to improve their current membership. This option will calculate the remaining value of the current plan and subtract it from the price of the new plan.

General

Is Enabled: Enable or disable the membership extension

Plan Upgrade Options

Upgrade Price Determined:

By rate subtraction (for limited plan)

This option will calculate the remaining value of the current plan and subtract it from the price of the new plan.

For example, plan A last for 10 days and is priced at \$100, and plan A+ is priced at \$200. Mr. B been using plan A for 7 days and he upgrades his membership to plan A+. The remaining value from plan A is:

$$100 / 10 * 3 = \$30$$

The price for upgrading will be:

$$200 - 30 = \$170$$

New plan price "minus" discount fixed amount (value1)

The plan for upgrading will equal to the new plan price minus a specific value set by the manager.

New plan price have discount percent (value1)

Members get a specific discount amount on the new plan's original price. The percentage value is determined by the manager.

By new plan price "minus" old plan price:

The upgrading price equals to the new plan price minus the old plan price.

Customer can refer more detail in below table:

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- MAGENEST MEMBERSHIP
- STORES
- SYSTEM
- FIND PARTNERS & EXTENSIONS

Configuration

Store View: Default Config

Save Config

GENERAL

CATALOG

CUSTOMERS

SALES

MAGENEST MEMBERSHIP

SERVICES

ADVANCED

General

Is Enabled Yes

Plan Upgrade Options

Upgrade Price Determined

Not change

This option determines upgrading plan's price behavior

Value1 200

Apply the Rate Subtraction for Permanent Plan

No

This option only working with option "rate subtraction" at "Price Determined"

If Plan A price 100\$ upgrade to Plan B price 150\$. The upgrade price is $150 - 100 = 50\$$

Not change:

By rate subtraction:

New plan price "minus" fixed amount:

New plan price have discount percent:

By new plan price "minus" old plan price:

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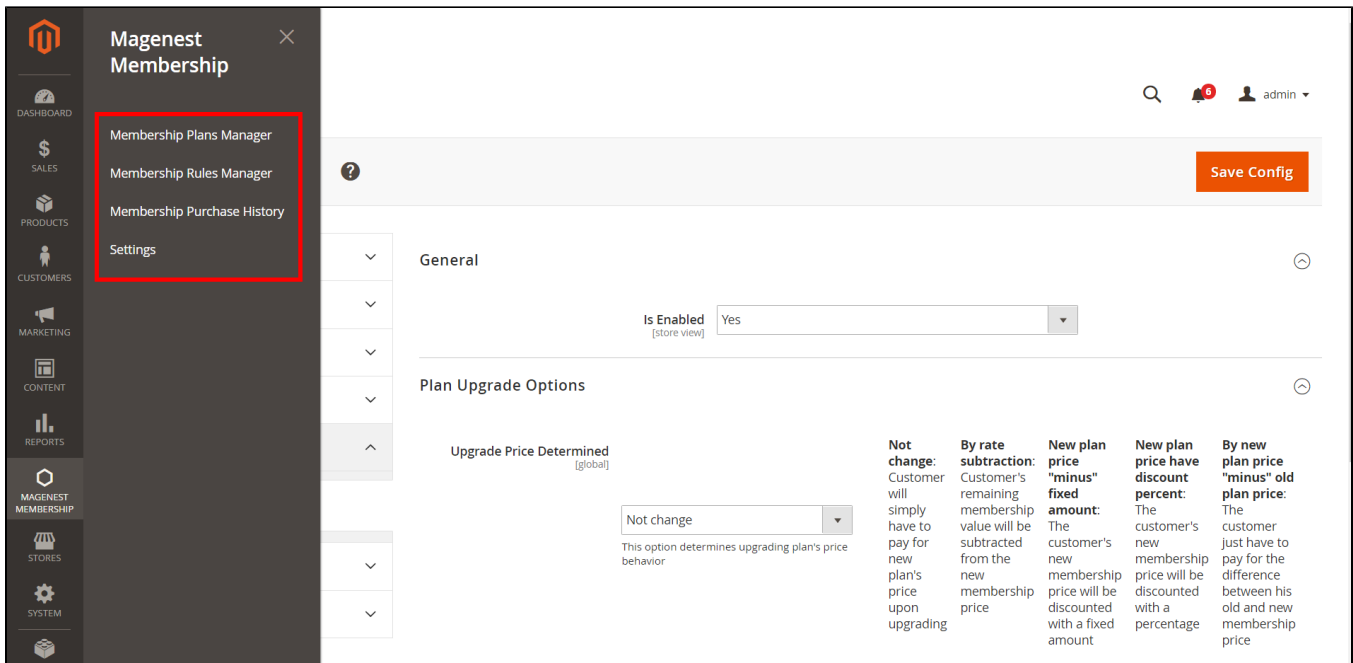
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When done, click **Save Config** to complete.

Main Functions

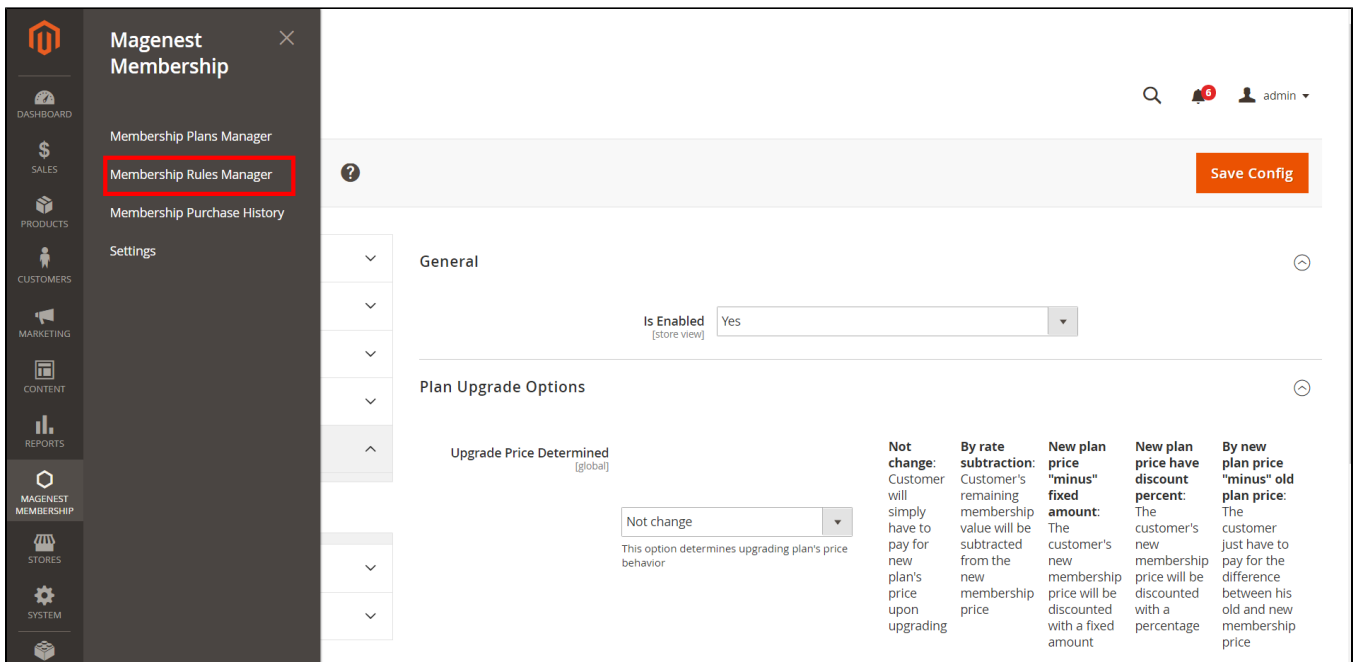
- **For Admin**

On the back end menu, admins can create a Magenest Membership which allows you to easily control and manage membership program as you wish.



- **Manage and set membership rules**

Firstly, admin need to set membership rules for membership plans by clicking on **Membership Rules Management**.



Then, the Membership Rules Manager screen will be shown.

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- MAGENEST MEMBERSHIP**
- STORES
- SYSTEM

Membership Rules Manager

Reindex Product Data
Add New

Search
Reset Filter
2 records found

20
per page
1 of 1

Rule ID	Rule Name	Created At
From		From
To		To
1	Apply for All	Sep 5, 2017
5	Rule for Iphone	Sep 7, 2017

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Each membership rule categorize a certain group of products to apply discount or restriction rule to them.

To create a new membership rule, click on **Add New** button. The New Rule screen appear.

Admin can set a name to the membership rule. Then create a conditions to limit the number of products.

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- MAGENEST MEMBERSHIP**
- STORES
- SYSTEM

New Rule

← Back
Reset
Save and Continue Edit
Save Rule

! To apply new rule for plan Membership, you must reApply the plan

MEMBERSHIP RULES CONFIGURATION

- Rule Information

Membership Rules

Rule Name *
Rule applies for Ipad Air Category

Product Restriction (don't add conditions if rule is applied to all products)

If ALL of these conditions are TRUE :

- Category is 3920

After you have set up the membership rule, press **Save Rule** button to save the new rule.

- **Manage and set membership plans**

To set membership plans, please navigate to **Magenest Membership > Membership Plans Management**.

Magenest Membership

Membership Plans Manager

Membership Rules Manager

Membership Purchase History

Settings

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

MAGENEST MEMBERSHIP

STORES

SYSTEM

?

Save Config

General

Is Enabled

Yes

Plan Upgrade Options

Upgrade Price Determined

Not change

Not change:

Customer will simply have to pay for new plan's price upon upgrading

By rate subtraction:

Customer's remaining membership value will be subtracted from the new membership price

New plan price "minus" fixed amount:

The customer's new membership price will be discounted with a fixed amount

New plan price have discount percent:

The customer's new membership price will be discounted with a percentage

By new plan price "minus" old plan price:

The customer just have to pay for the difference between his old and new membership price

Then, the Membership Plans Management screen will be displayed.

Membership Plans Manager

Add New Plan

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

Search by keyword

Filters

Default View

Columns

Export

Actions

0 records found

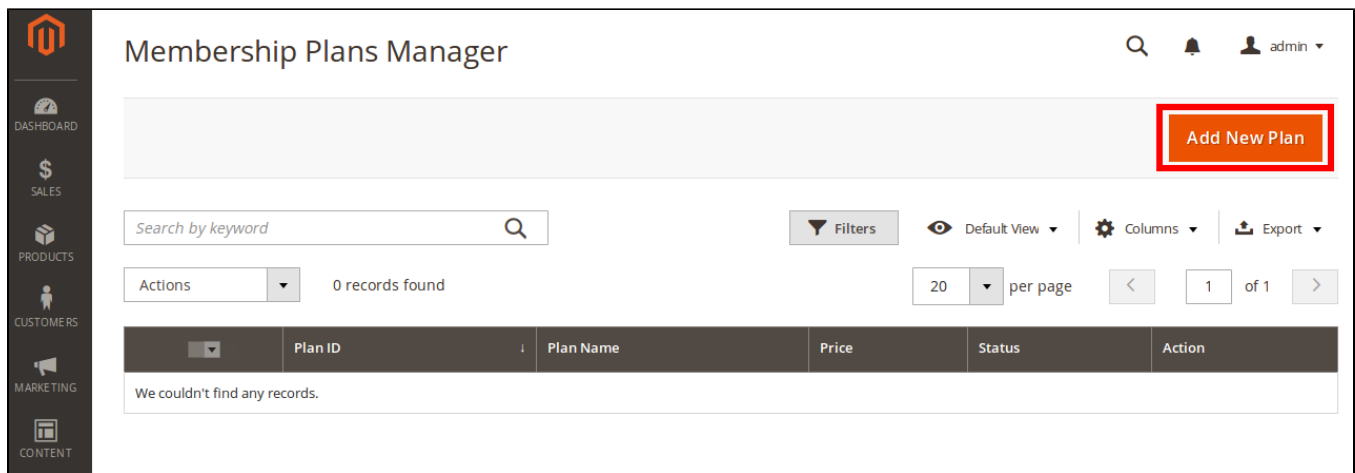
20 per page

1 of 1

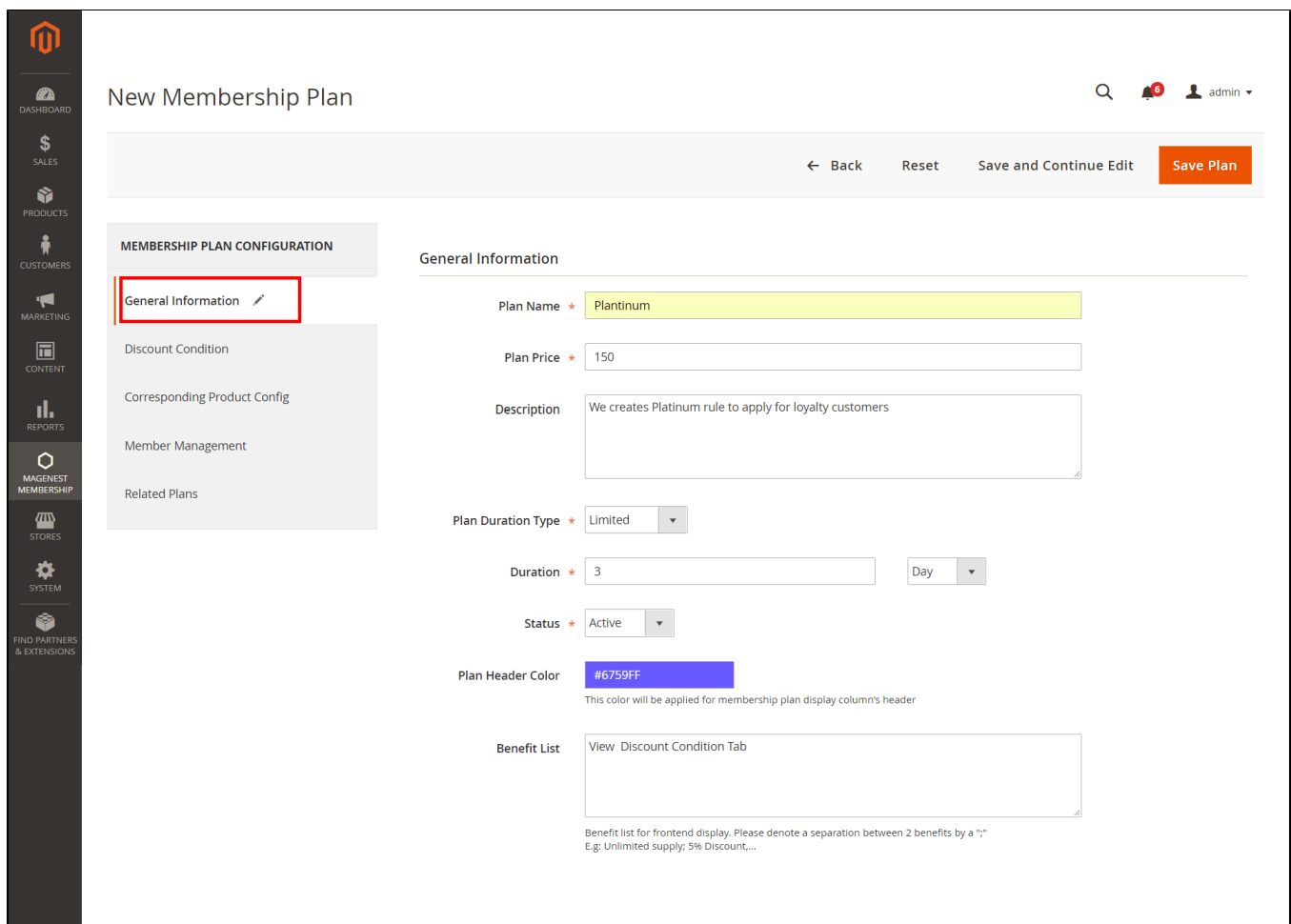
	Plan ID	Plan Name	Price	Status	Action
We couldn't find any records.					

- **Add new plans**

Click on Add New Plan to create a new membership plan



Then, the **Membership Plans Manager** will be shown, along with several configuration tabs.



+ General Information:

Plan Name: The plan name that you want to show to your customer on the front-end

Plan Price: The price that customer has to pay to purchase this membership

Description: Give customers more information about the membership plan

Plan Duration Type:

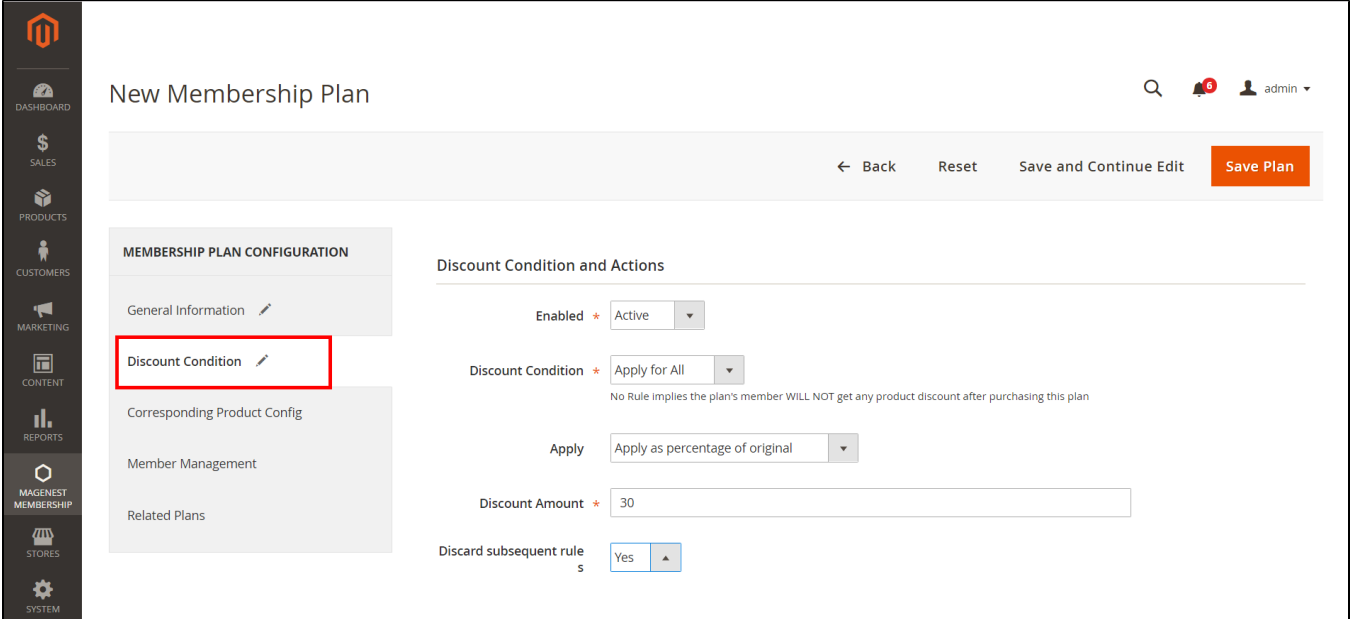
- Permanent: You can pay a one-off amount of money to keep your membership forever.
- Limited: The membership will last for a limited period of time and customers will have to renew the membership plan once it expires.

Status: Turn the membership plan on or off to show in on or hide it from the front-end.

Plan header color: Choose a header color for your membership plan.

Benefit List: information filled in this box will be displayed as benefits of the benefit plan on the front-end.

Discount Condition:



The screenshot displays the 'New Membership Plan' configuration interface. On the left, a sidebar lists various configuration sections: General Information, Discount Condition (highlighted with a red box), Corresponding Product Config, Member Management, and Related Plans. The main content area is titled 'Discount Condition and Actions'. It includes several settings: 'Enabled' is set to 'Active'; 'Discount Condition' is set to 'Apply for All' with a note stating 'No Rule implies the plan's member WILL NOT get any product discount after purchasing this plan'; 'Apply' is set to 'Apply as percentage of original'; 'Discount Amount' is set to 30; and 'Discard subsequent rule' is set to 'Yes'.


This function also uses the membership rule in the previous section to apply discount to the a certain product group. Members of the current plan will enjoy discount when buying products from that meets this condition.


Enabled: Turn the discount rule on or off.


Discount Condition: Choose a membership rule that you have created in the membership rule section. This will apply the discount to a certain product group.


Apply: Choose to discount products by a percentage or by a fixed amount.


Corresponding Product Config:





 DASHBOARD


 SALES


 PRODUCTS


 CUSTOMERS


 MARKETING

 CONTENT

 REPORTS


 MAGENEST MEMBERSHIP


 STORES


 SYSTEM

New Membership Plan

MEMBERSHIP PLAN CONFIGURATION

General Information 

Discount Condition 

Corresponding Product Config 

Member Management

Related Plans

← Back

Reset

Save and Continue Edit

Save Plan

Corresponding Product Configuration

Name *

Plantinum

SKU *

Plantinum

Quantity *

1000

Image

Choose File

No file chosen

Description

It is easy to purchase!

Member Management:

In this section, admin can see members of the current plan

DASHBOARD

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SYSTEM

New Membership Plan

MEMBERSHIP PLAN CONFIGURATION

General Information

Discount Condition

Corresponding Product Config

Member Management

Related Plans

Related Plans

Can be upgraded to plan \$

Dimond Plan

Kuwait

← Back

Reset

Save and Continue Edit

Save Plan

Admins can connect multiple plans together to create a complete membership pricing scheme. For example, your membership scheme might contain three pricing plans - Dimond Plan, Kuwait, Platinum with

Please press **Save Plan** to make sure the membership plan saved. On the front end.

Notice: Admin click on **Apply Plans** button to update condition of plan when edit information for plan.

DASHBOARD

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CUSTOMERS

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MAGENTEST MEMBERSHIP

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Membership Plans Manager

Search by keyword

Filters

Default View

Columns

Export

Actions

3 records found (1 selected)

20 per page

1 of 1

	Plan ID	Plan Name	Price	Duration	Status	Discount Status	Action
<input checked="" type="checkbox"/>	4	Platinum	150.0000	3 Days	Active	Active	View
<input type="checkbox"/>	5	Dimond Plan	250.0000	30 Days	Active	Active	View
<input type="checkbox"/>	6	Kuwait	1400.0000	1 Years	Active	Active	View

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Now you can go to the front-end menu to check if the membership plan has been created.

Membership Plans

Platinum

\$150.0000

View Detail

🔒 Purchase Now

Duration: 3 Days

Diamond Plan

\$250.0000

View Detail

🔒 Purchase Now

Duration: 30 Days

Kuwait

\$1400.0000

View Detail

🔒 Purchase Now

Duration: 1 Years

Unlimited lounges Unlimited Meet & Assist

- Manage Membership Purchase Historys

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

MAGENEST MEMBERSHIP

STORES

SYSTEM

Membership Purchase History

Search [Reset Filter](#) 8 records found

20 per page < 1 of 1 >

Customer ID	Customer Name	Email	Period	Status	Phone	ZIP	Address	City	Country
From						From			
To						To			
3	abc xyz	nguyen.nghia.1095@gmail.com	30 Days	active	123456	10001	123 Wall Street	New York	US
4	hienmem	hienmem@gmail.com	3 Days	active	123123	123	test	test	US
4	hienmem	hienmem@gmail.com	30 Days	upgraded	123123	123	test	test	US
2	Susan Smith	susansmith2602@gmail.com	30 Days	active	12345678	10001	1104 Ave Oxford	New York	US
3	abc xyz	nguyen.nghia.1095@gmail.com	3 Days	upgraded	123456	10001	123 Wall Street	New York	US
2	Susan Smith	susansmith2602@gmail.com	3 Days	upgraded	12345678	10001	1104 Ave Oxford	New York	US
1	huyen my	luonghuyenmy95@gmail.com	30 Days	active	124353	10110	123 Wall Street	New York	US
1	huyen my	luonghuyenmy95@gmail.com	30 Days	upgraded	124353	10110	123 Wall Street	New York	US

Finally, managers can see the purchase history of customers, including new plan purchase, plan upgrade, or plan cancellation.

For customer

- User-friendly interface

We designed a user-friendly interface that allows customers to be comfortable and convenient.

Membership Plans

Platinum

\$150.0000

View Detail

🔒 Purchase Now

Duration: 3 Days

Diamond Plan

\$250.0000

View Detail

🔒 Purchase Now

Duration: 30 Days

Kuwait

\$1400.0000

View Detail


🔒 Purchase Now

Duration: 1 Years

Unlimited lounges Unlimited Meet & Assist


- **Easy payment**

Customer can buy a membership product and make payment with no hassle.



TRAININGGEARIPAD AIRAPPLEQMEMBERSHIP PLANSDEFAULT STORE VIEW

SHOPPING CART

ITEM	QTY	PRICE	SUBTOTAL	
 PLATINUM	1	\$150.00	\$150.00	X

CONTINUE SHOPPING

CLEAR SHOPPING CARTUPDATE CART

APPLY DISCOUNT CODE

Enter discount code

Enter discount code

Apply Discount

ESTIMATE TAX

Enter your billing address to get a tax estimate.

Country

United States

State/Province

New York

TOTAL

Subtotal	\$150.00
Order Total	\$150.00

GO TO CHECKOUT

After customer purchase plan, they will see limit of product is applied for this plan:



PRODUCT



IPHONE X EDITION 64GB
\$960.00 ~~\$1,200.00~~



IPHONE 7 PLUS RED 256 GB
\$800.00 ~~\$1,000.00~~



IPAD AIR 5
\$124.00 ~~\$155.00~~



IPAD AIR 7
\$160.00 ~~\$200.00~~


ADD TO CART

♥️ 🛒



Note: Customer have to sign out for spending time for system processing session. After customer resign in and see the product be affected.

- **Manage membership**

We create a membership tab in the customer dashboard to help them manager their membership by clicking on **My Account > My Memberships**



[TRAINING](#)
[GEAR](#)
[IPAD AIR](#)
[APPLE](#)
[Q](#)

[MEMBERSHIP PLANS](#)
[DEFAULT STORE VIEW](#)



MY MEMBERSHIPS

My Account
[Account Dashboard](#)
[Account Information](#)
[Address Book](#)
[My Downloadable Products](#)
[My Orders](#)
[Newsletter Subscriptions](#)
[My Credit Cards](#)
[Billing Agreements](#)
[My Product Reviews](#)
My Memberships
[My Wish List](#)

Plan	Signup Date	Expiry Date	Status	
Dimond Plan	2017-09-08 07:11	2017-10-08 07:11	Active	Cancel View Detail
Platinum	2017-09-07 09:20	2017-09-10 09:20	Upgraded	

Customer can Cancel plan by clicking Cancel button and click View Detail button to view detail button for customers.

Update

- When a bug fix or new feature is released, we will provide you with the module's new package.
- All you need to do is repeating the above installing steps and uploading the package onto your store. The code will automatically override.
- Flush the configure cache. Your store and newly installed module should be working as expected.

Support

- We will reply to support requests within **2 business days**.
- We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
- Support **DOES NOT** include other services such as customizing our products, installation and uninstallation service.

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.