De-Supported DNN Modules as of Personify 7.5.0

Prepared By:
Personify, Inc.

Version 7.5.2 *9/4/2013*

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Configuring Web Modules for Logging In

Configuring the DNN Schedule Web Module

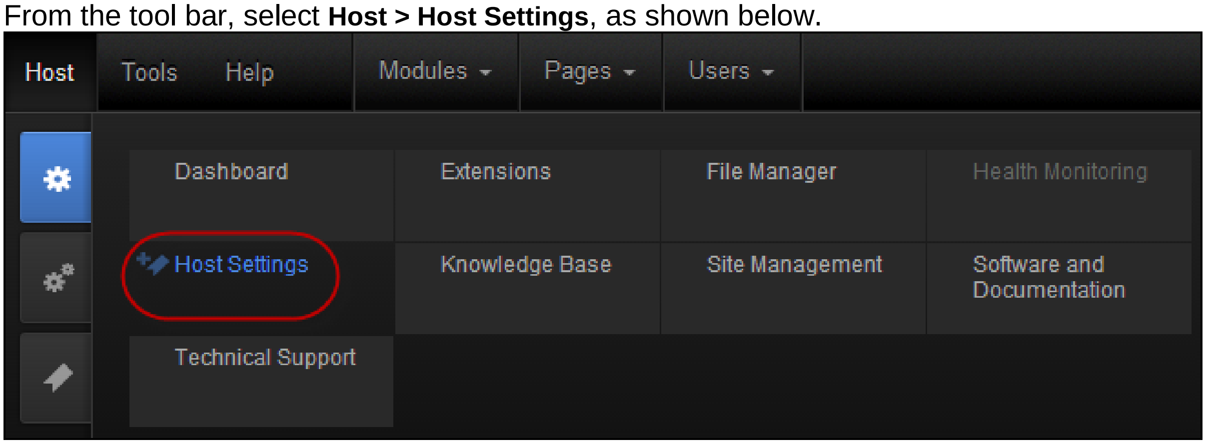
The DNN Schedule module allows Super Users to schedule tasks to run against the DNN database at scheduled intervals. The Scheduler module optimizes the efficiency of a site by reducing the frequency of common tasks. The Scheduler module cannot be deployed to other site pages.

Note: Personify recommends configuring the time lapse schedule of the DNN Schedule Web Module Event Log to one day. The proceeding steps detail how to do so. While these instructions concentrate on the lapse schedule, you can also find information on how to configure other DNN Schedule settings within these steps.

To configure the DNN Schedule web module:

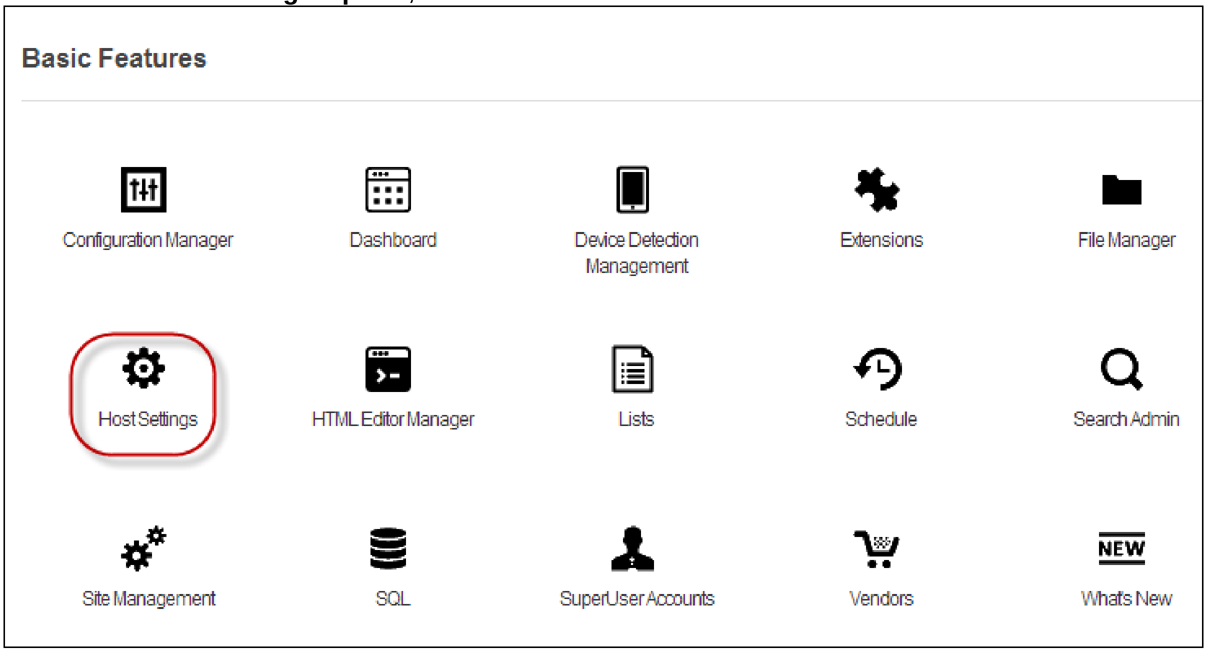
1) Make sure you are logged into the website as a Host.

2) From the tool bar, select **Host > Host Settings**, as shown below.

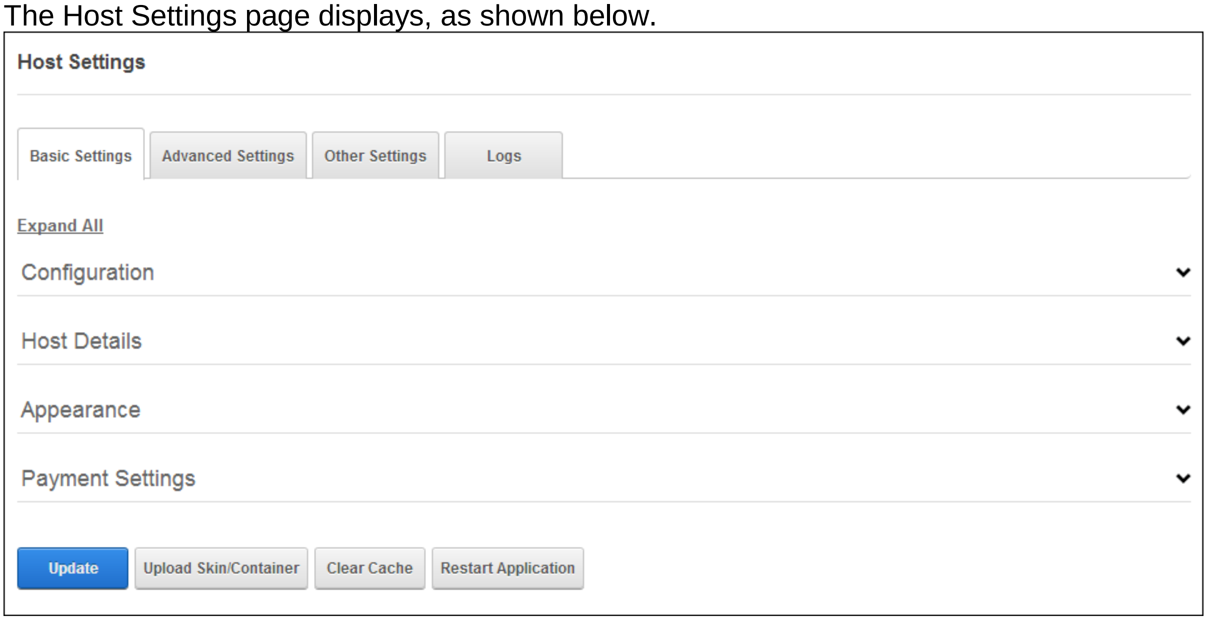


Or, from the tool bar, select **Host.**
The **Basic Features** page displays.

3) Select the **Host Settings Option**, as shown below.

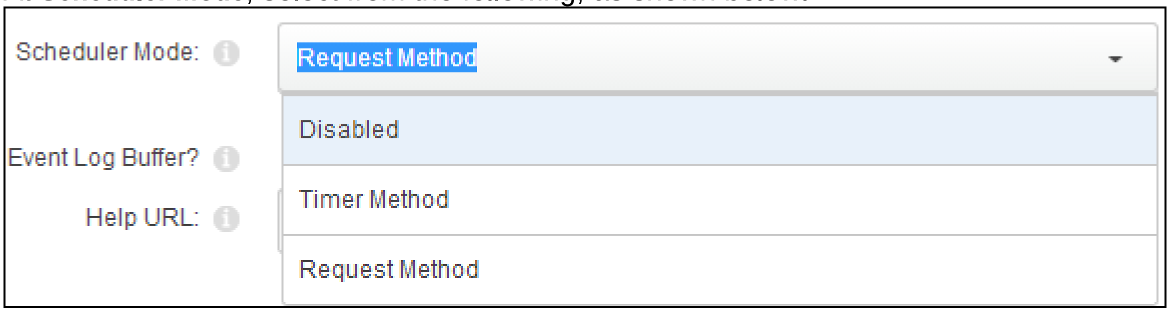


4) The Host Settings page displays, as shown below.



5) Select the **Other** tab.

6) At **Scheduler Mode**, select from the following, as shown below.



   (1) **Disabled**: Select to disable the scheduler.
   (2) **Timer Method**: Select to enable the scheduler and maintain a separate thread to execute scheduled tasks while the worker process is alive.
   (3) **Request Method**: Select to enable the scheduler and set scheduled tasks to run when page (HTTP) requests are made.

Note: Setting the Time Lapse to 1 Day is only a recommendation of Personify. You may configure your settings in a way that best suits your association or discuss the best settings with your Account Specialist.

---

7) Click the **Update**.

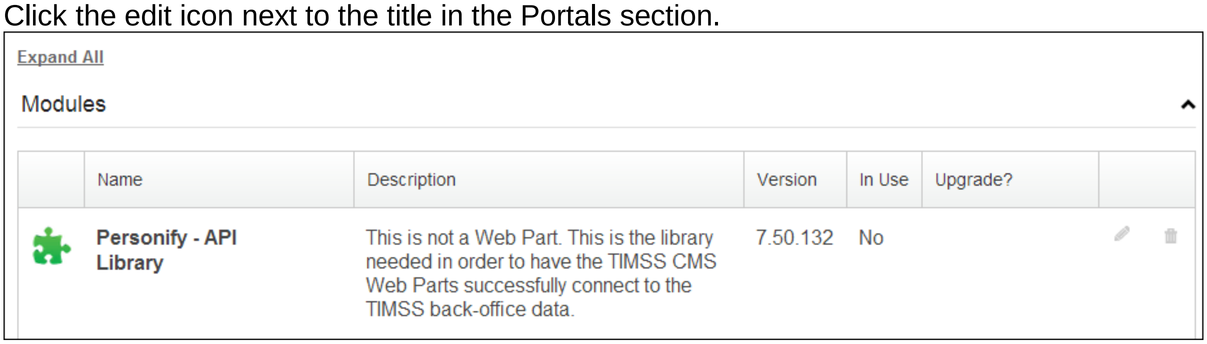
Configuring the Multiportal Feature

The Multiportal feature lets you add an additional portal, or website, to your e-Business application. This allows your organization to maintain two or more e-Business websites. Setting up the Multiportal feature is different from setting up the other web modules. Even though there are no pre-requisite modules to install, you must still be logged in as a host.

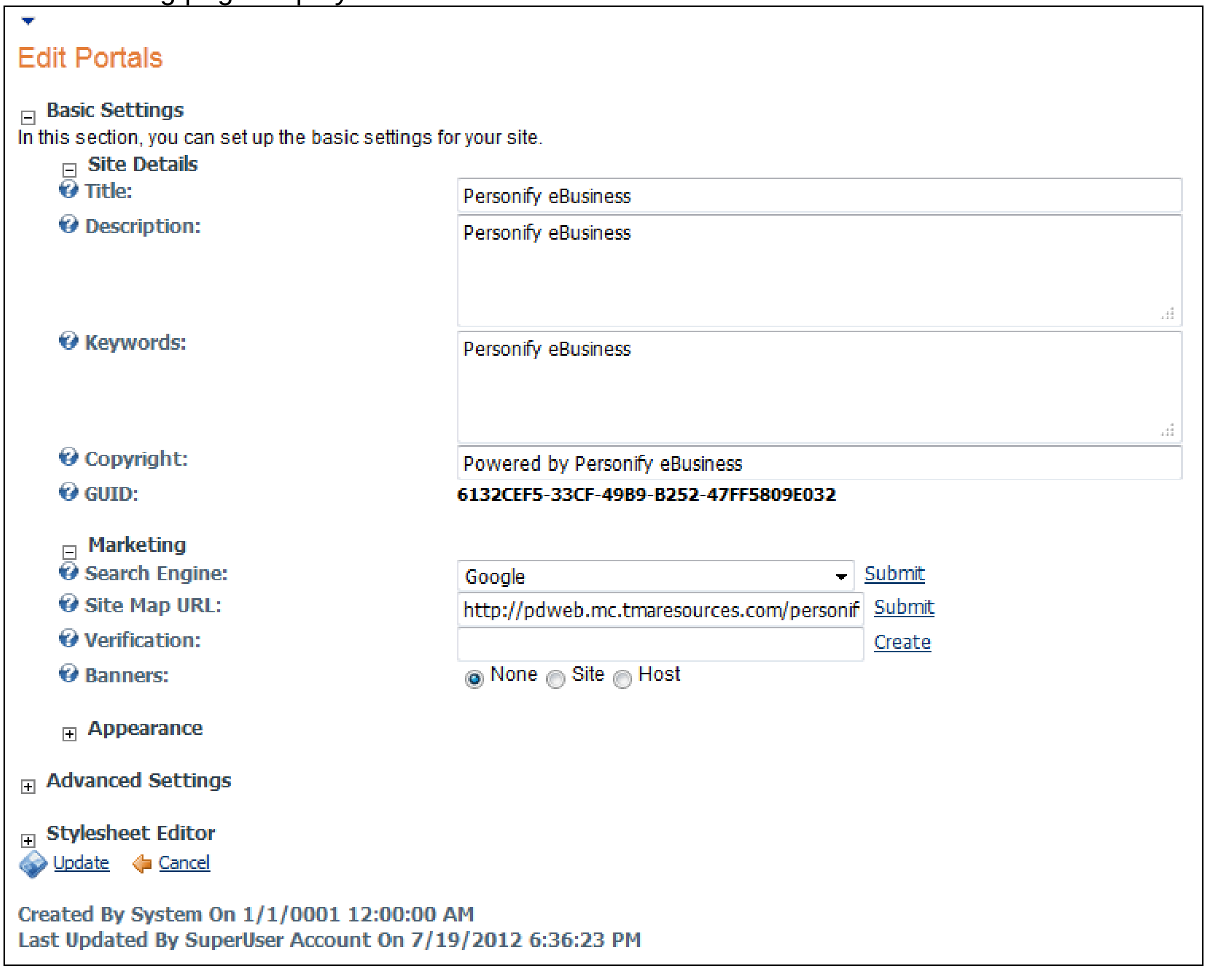
To configure the multi-portal web module:

1) Follow the Working with Portals procedure to create a new portal.

2) Click the edit icon next to the title in the Portals section.



The following page displays:



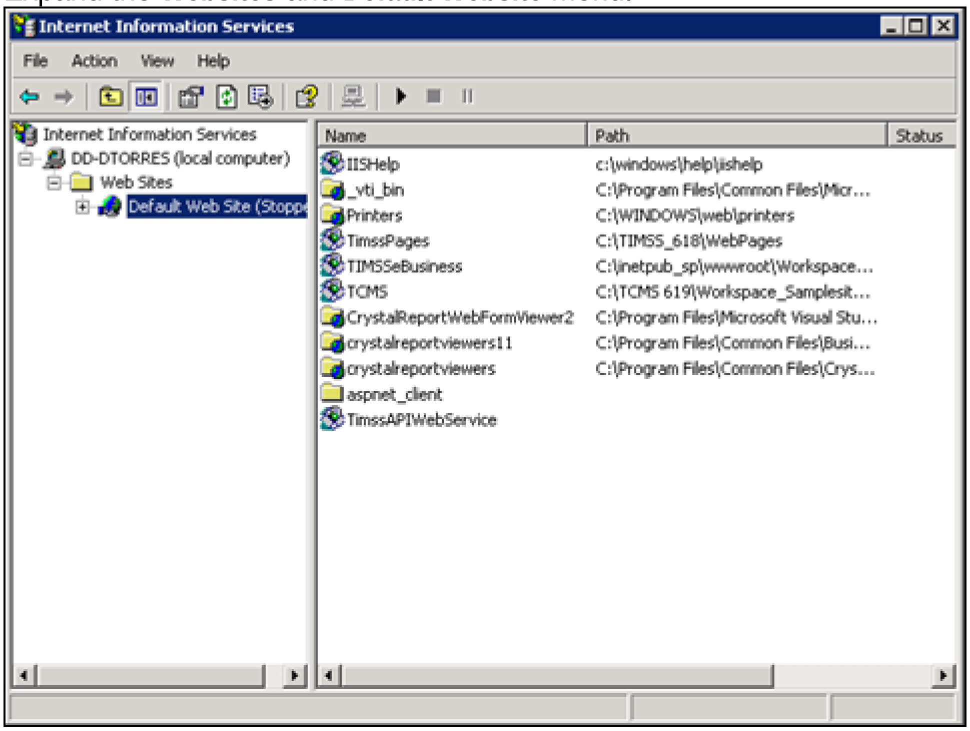
3) Refer to the Site Settings configuration section.

Note: There are a number of additional steps that you must perform in your Windows environment in order to make this web module function properly. These steps are detailed below.

---

4) Click the **Start** menu and open the Control Panel.
5) Click **Administrative Tools**.
6) Double-click the **Internet Information Services** shortcut.

7) Expand the **Websites** and **Default Website** menu.



8) Copy the local path.

9) Right-click the panel and select **New** and then **Virtual Directory...**

10) Follow the instructions in the wizard.

11) Right-click the panel and select **Properties**.

12) In the ASP.NET tab, make sure ASP.NET 2.0 is selected.

13) Click the **Start** menu and click **Run...**
14) Type **IISRESET** and then press **Enter**.

Configuring the Create User Web Module

The Create User web module is used in conjunction with the Login and Activate Account web modules. After a customer activates their account via the Activate Account web module, they are emailed a link to the page containing the Create User web module where they can set up their web user information.

Note: Prior to using this module, you must ensure that the Login and Activate Account web modules are installed and configured.

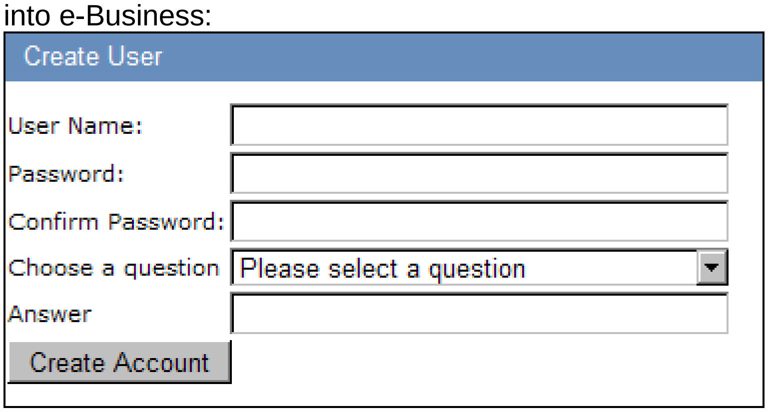
To set up the Create User web module:

1) Log into your site as Host.
2) Navigate to the page on your site containing the Activate Account web module.
3) Add the **Personify – Create User** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.

Note: The Create User web module requires no setup. You will, however, need to edit the Activate Account web module to point to this page. See Configuring the Activate Account Web Module for more information.

Customer Impact

After configuring the Create User web module, it may appear as follows for a customer logged into e-Business:



To reach this page, a customer will have had to gone through the following process:

1) The customer clicks Activate Account from the login module or your organization's website.
2) The customer fills out the required information on the Activate Account screen and is sent an email to their primary email address.
3) The customer clicks the link within the email and is taken to the Create User module.
4) The customer fills in the information on the Create User screen and clicks **Create Account**. A new web user account is created and the customer is taken to their My Account screen.

Configuring Web Modules for My Account

Configuring the My Account Web Module

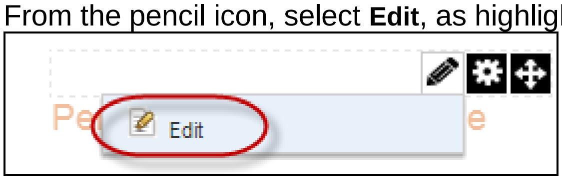
The My Account web module allows you determine how you want your account page to display. You can use this module to design the appearance of the details page from a customer search. Before you can actually configure the web module, you must first check your settings and make sure that the views are properly set.

To configure the My Account web module:

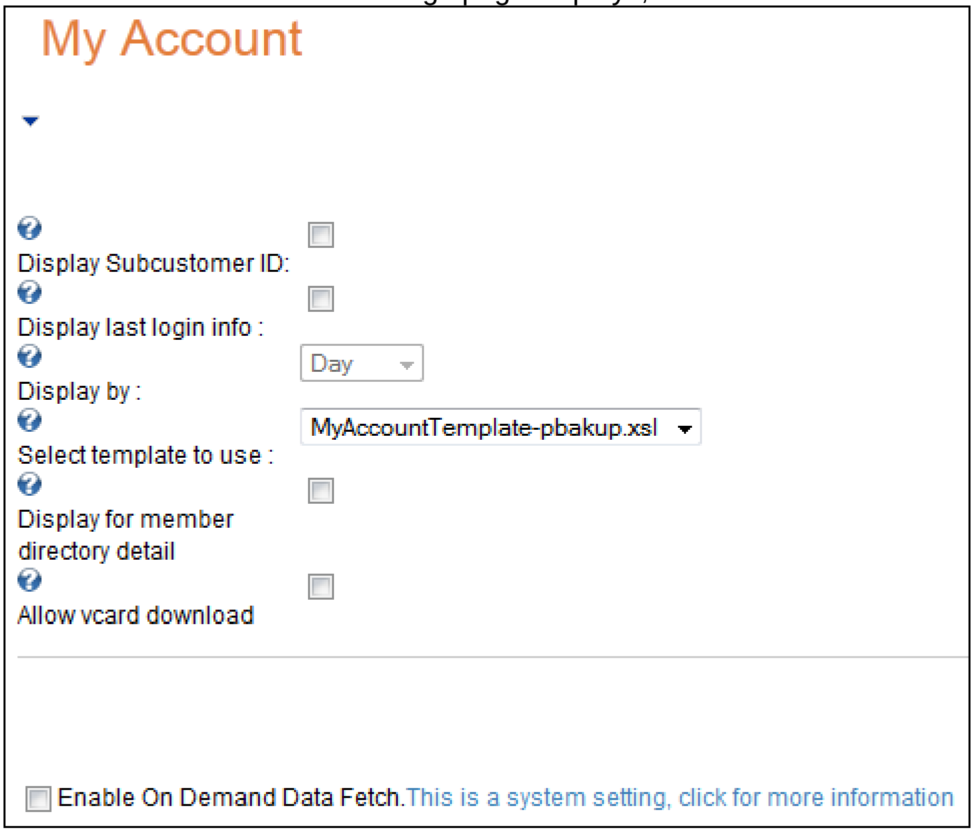
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the My Account web module.

3) Add the **Personify – My Account** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The Edit Activate Account Settings page displays, a shown below.



5) Configure the appropriate module settings as described below:

(1) **Display last login info** - Checkbox. Displays the last login of the customer. Displays the amount of time since last login by either number of days, weeks, or months.

(2) **Display by** - Drop-down. Using this drop-down you can select in which format the last login information displays (days, weeks, months). Only becomes active if "Display last login info" is checked.

(3) **Select template to use** - Drop-down. This setting lets you select either the default template or any other template that you may have created to present customer account information using the My Account web module.

(4) **Display for member directory detail** - Checkbox. This allows you to select, for security reasons, whether or not you want this customer's detail information to display in the dynamic search results.

(5) **Allow Vcard download** - Checkbox. When checked, allows other customers to download this customer's Vcard information. If this checkbox is checked, select the Link Type:

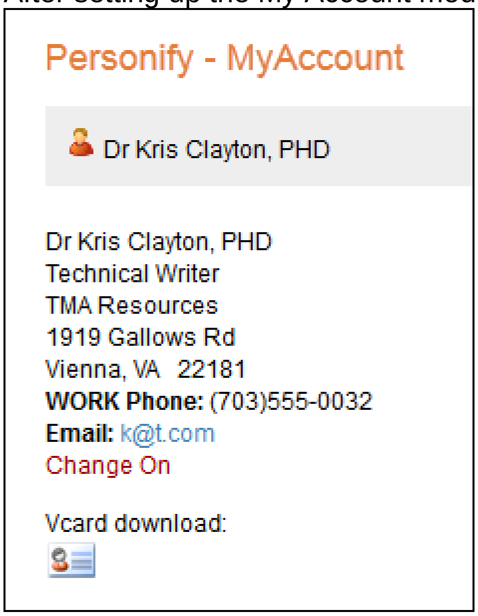
(a) URL – If the URL radio button is selected, a text box displays. Enter the URL you want the user to be directed to upon clicking the Vcard.

(b) Page – If the Page radio button is selected, a drop-down box displays. Select a page from your site you want the user to be directed to upon clicking the Vcard.

6) Click **Update**.

Customer Impact

After setting up the My Account module, it may appear, as below, to your customer.



Configuring the Customer Demographics Web Module

The Customer Demographics web module gives associations the ability to gather personal demographic information from members over the association's website. This web module directly updates member demographic information stored in all customer record types:

(1) Individual (I)

(2) Company (C)

(3) Committees (T)

Any updates made to the website are directly carried over to Demographics Information for customer record types (individual, company, and committees). In addition, for individual customers (I), direct updates can be made to the member's education, special interests, and special needs information.

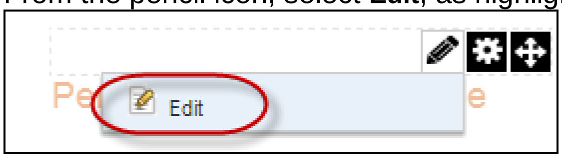
Once you add the web module on the desired page, you must configure it using the web module's setting menu. This only needs to be done the first time that you configure the web module and is done using a wizard-like menu.

To configure the Demographic web module:

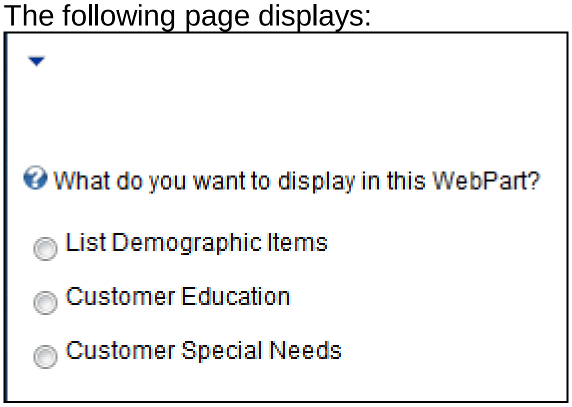
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Customer Demographic web module.

3) Add the **Personify – Customer Demographic** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:
What do you want to display in this web part:

   (1) **List Demographic Items** - Radio button. Select this option to display information about an individual's special interests including, for example, professional areas of practice, other association affiliations, etc
   (2) **Customer Education** - Radio button. Select this option to display specified education related information on a customer's profile.
   (3) **Customer Special Needs** - Radio button. Select this option to display information such as meeting information, which may specify that the member is vegetarian. Additionally, this information may record that the member is disabled and requires a wheelchair.

Note: Although you can customize the system and add additional demographics tables and information, the previously listed customer demographics features are available out of the box.

Depending on the radio button selected, different options appear. However, they all appear in the same table with the same columns. All of the columns are described in the list below:

(4) **Field** - Table column/read-only. This column contains the property names of the user's demographic items. These are API Property Names and not database table fields.

(5) **Display Title** - Table column/text box. This columns lets you customize the captions on the generated forms.

(6) **Display** - Table column/checkbox. This column lets you indicate whether or not that specific demographic data is displayed in the form.

(7) **Enable Add** - Table column/checkbox. If Enable is checked, the field is available for data input, otherwise it is hidden from users. If ReadOnly is checked, it is visible to users, but it is not available for input.

(8) **Enable Edit** - Table column/checkbox. If Enable is checked, the field is available for input, otherwise it is hidden from users. If ReadOnly is checked, it is visible to users, but it is not available for input.

(9) **Required** - Table column/checkbox. This controls the validation of the input on both the Add and Edit forms. If checked, the user is required to provide input for the field.

(10) **Sort** - Table column/checkbox. This column controls the order in which fields appear on the Data View, Add Data Form, and Edit Data Form.

a) If you select the List Demographic Items radio button, the following fields appear:

Field	Display Title	Display	Enable Add	Enable Edit	Required	Sort
DemographicCode	Code	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	1
DemographicSubcode	Sub Code	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	2
UserD1	USER D1	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	3
UserD2	USER D2	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	4
UserN1	USER N1	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	5
Comments	Comments	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	6

(1) Once completed, this module pulls information from the Customer Interests module. Configure the appropriate module settings as described below:

(a) **DemographicCode** - This row allows you to change options for displaying the interest code.

(b) **DemographicSubcode** - This row allows you to change options for displaying the interest subcode.

(c) **UserD1** - This field allows you to change the options for displaying the interest start date.

(d) **UserD2** - This field allows you to change the options for displaying the interest end date.
(e) **UserN1** - This field allows you the change the options for displaying the user number.
(f) **Comments** - This field allows you to change the options for displaying any comments associated with the interest entry.

b) If you select the Customer Education radio button, the following fields appear:

Field	Display Title	Display	Enable Add	Enable Edit	Required	Sort
ProgDegreeCode	Program or Degree	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	1
ProgTypeCode	Program Type	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	2
InstitutionName	Institution Name	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	3
BeginDate	Start Date	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	4
EndDate	End Date	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	5
Comments	Comments	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	6

(1) Configure the appropriate module settings as described below:

(a) **PrgDegreeCode** - This field allows you to change the options for displaying the Program or Degree column.
(b) **ProgTypeCode** - This field allows you to change the option for displaying the Program Type column.
(c) **InstitutionName** - This field allows you to change the option for displaying the name of the institution.
(d) **BeginDate** - This field allows you to change the option for displaying the Begin Date column.
(e) **EndDate** - This field allows you to change the option for displaying the End Date column.
(f) **Comments** - This field allows you to change the option for displaying any comments associated with the education entry.

c) If you select the Customer Special Needs radio button, the following fields appear:

Field	Display Title	Display	Enable Add	Enable Edit	Required	Sort
NeedTypeCode	Need Code	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	1
NeedCode	Need Type	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	2
Description	Description	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	3
Comments	Comments	☑	☑ Enable ☐ ReadOnly	☑ Enable ☐ ReadOnly	☐	4

(1) Configure the appropriate module settings as described below:

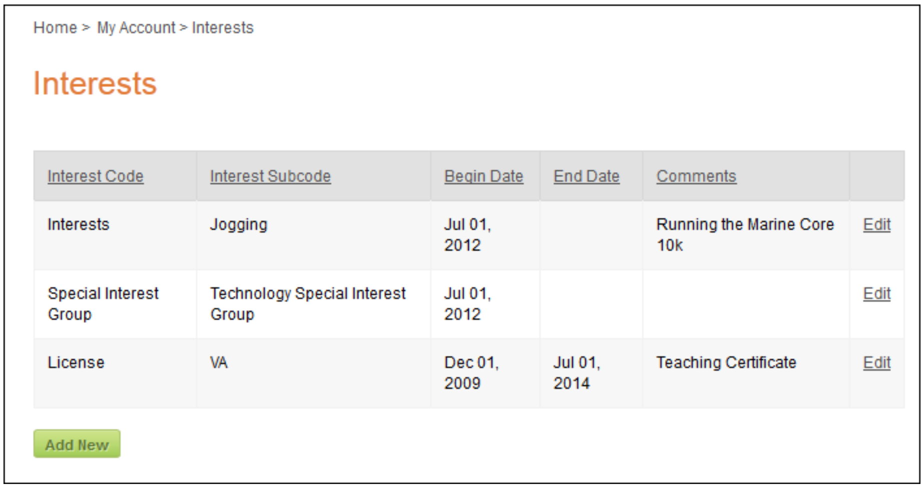
(a) **NeedTypeCode** - This field allows you to change the option for displaying the special need code.
(b) **NeedCode** - This field allows you to change the option for displaying the special need type.

(c) **Description** - This field allows you to change the option for displaying a description of the special need.
(d) **Comments** - This field allows you to change the option for displaying any comments associated with the special need entry.

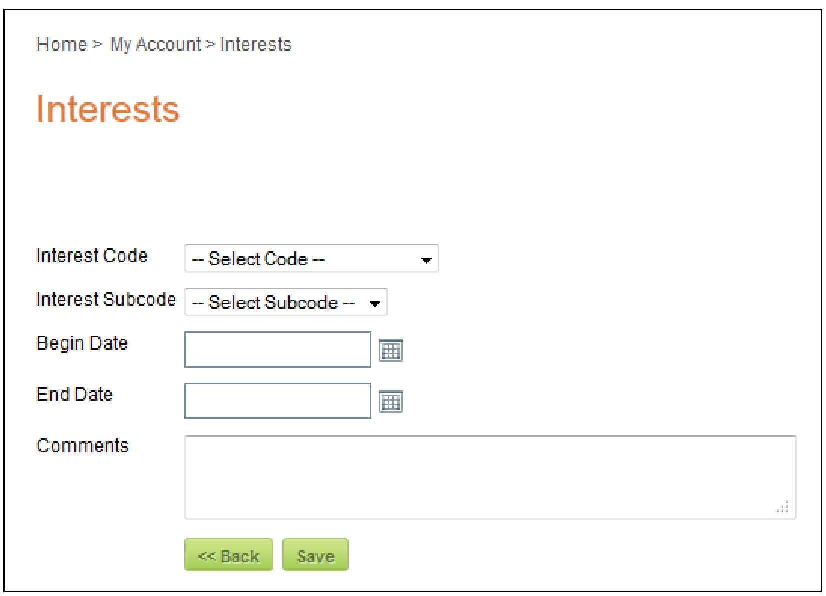
6) Click **Update**.

Customer Impact

After configuring the Customer Demographics web module, your customers will see the module similar to the one below if you have selected the List Demographics option.



Clicking **Edit** or **Add New** allows the customer to add new demographic information or edit previously entered information



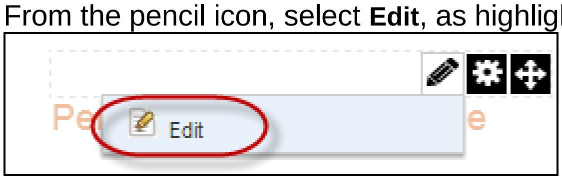
Note: Field names and their behavior are dependent upon how you set up your Demographic web module.

Configuring the Customer Preferences Web Module

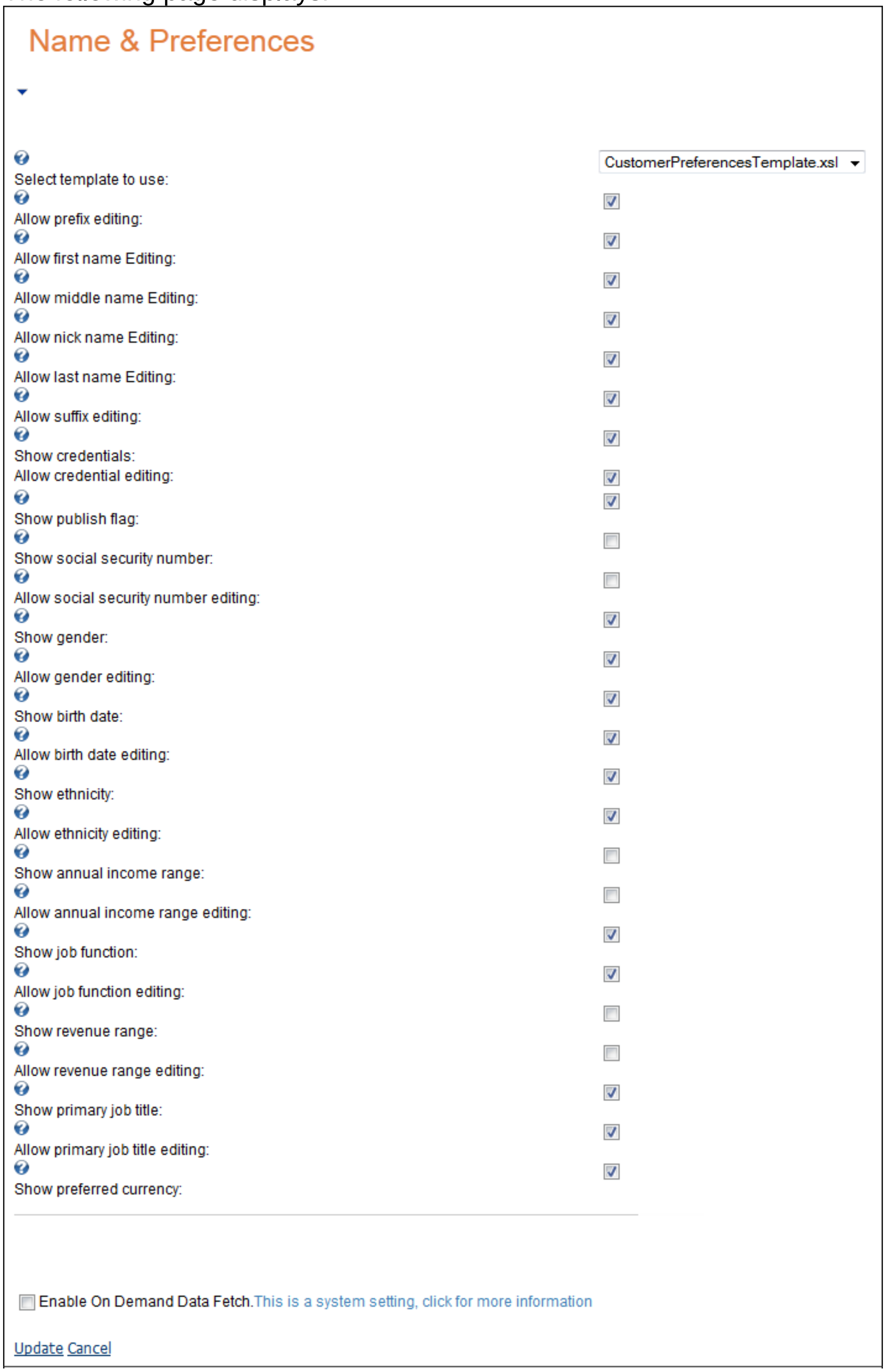
Beginning with the 7.0.6 release, the Customer Demographic Information section, formerly found in the Customer Demographic web module, is now found in the Customer Preferences web module. The Customer Preferences web module gives you the ability to either show or hide certain pieces of a customer's information. Additionally, you can choose whether or not the customer has permission to edit those pieces of information.

To configure the Customer Preferences web module:

1) Log into your site as Host.
2) Navigate to the appropriate page on your site where you want to add the Customer Preferences web module.
3) Add the **Personify-Customer Preferences** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



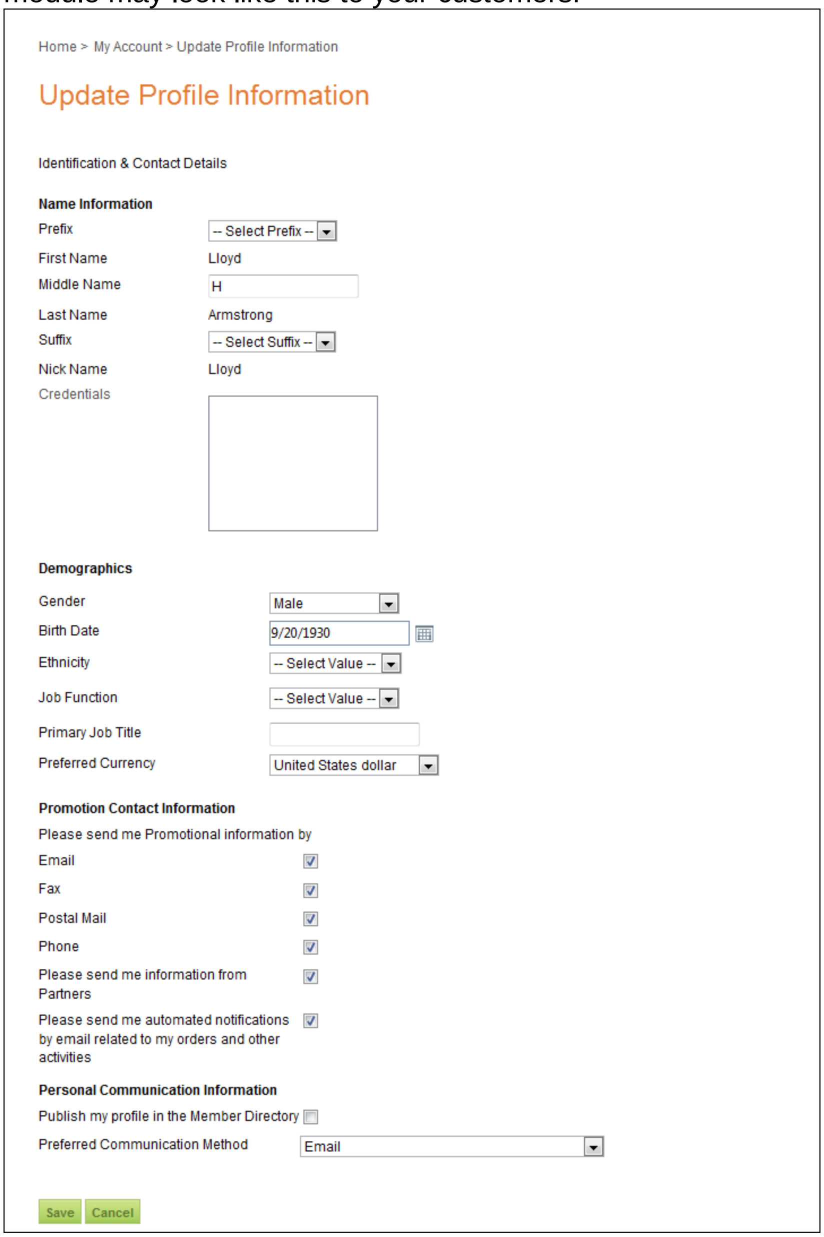
5) Click the drop-down to select a template to use.

6) Review all the options noted with a checkbox and select the options you want to allow customers to view and/or edit.

7) Click **Update**.

Customer Impact

Depending on the options you checked when setting up the module and your site settings, the module may look like this to your customers:



Note: As of 7.4.1SP1, if a web user updates his/her Primary Job Title from this page, the system will ask if the user wants to update the job title on all work addresses.

Configuring the Communication Methods Web Module

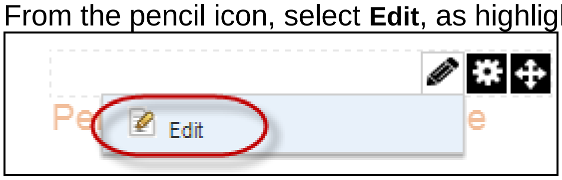
The Communication Methods web module displays a listing of the current users' communication methods such as phone, fax, email address, etc. The module also allows your users to add and edit different phone numbers, fax numbers, and email addresses for their homes, businesses, cell phones, etc.

To configure the Communication Methods web module:

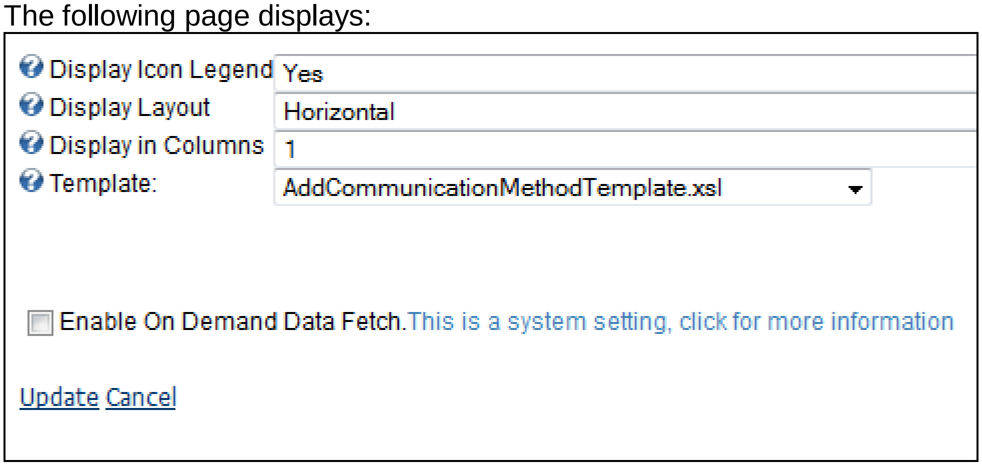
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Communication Methods web module.

3) Add the **Personify – Communication Methods** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

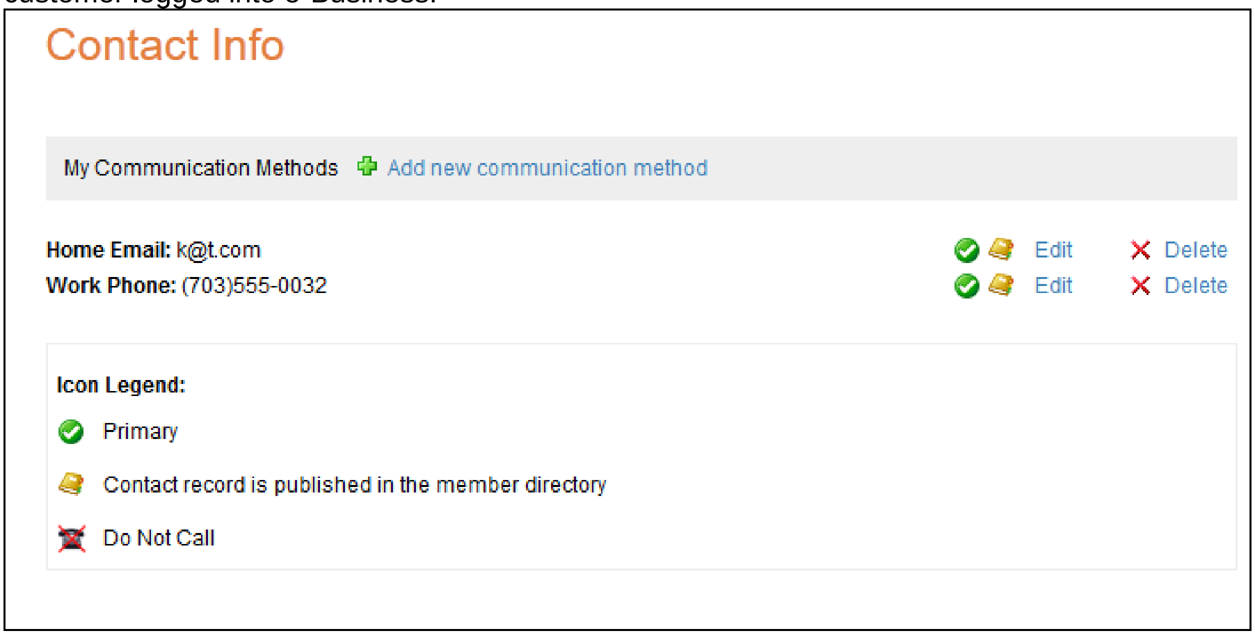
   (1) **Display Icon Legend** – Drop-down. This setting lets you determine whether or not a legend should appear within the web module, which explains the meaning of the icons appearing in the web module.

(2) **Display Layout** – Drop-down. This setting lets you determine whether you want the web module to display the web module contents horizontally or vertically.
(3) **Display in Columns –** Drop-down. This setting lets you determine how many columns the web module should use to display its content. You may select from one to ten columns.
(4) **Template –** Drop-down. This drop-down allows you to select a previously set up template in which the Communication Methods module displays.

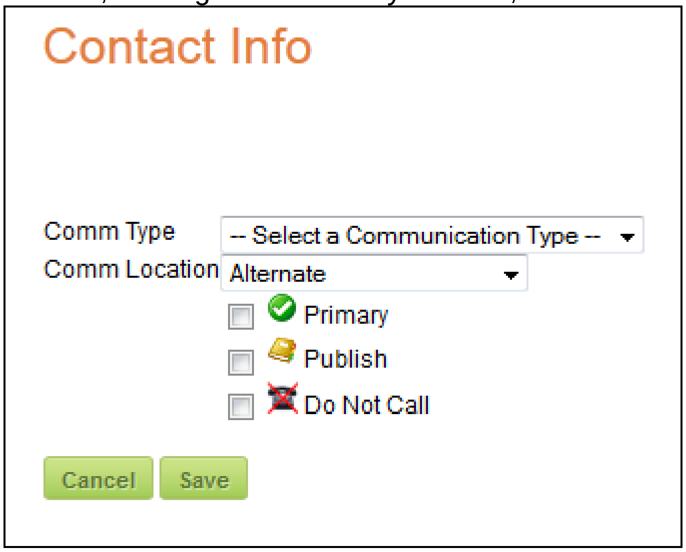
6) Click **Update**.

Customer Impact

After configuring the Communication Methods web module, it may appear as follows for a customer logged into e-Business:



Customers can then add preferred communication methods by clicking **Add new communication method**, making the necessary choices, as shown below, and clicking **Save**.



Note: The “Do Not Call” option only displays when the Comm Type is Phone or Fax.

Configuring the Edit Communication Methods Web Module

The Edit Communication Methods web module does not need to be dropped onto any page on your site and requires no setup. It simply needs to be installed on your site. This module is used behind-the-scenes in conjunction with the Communication Methods web module.

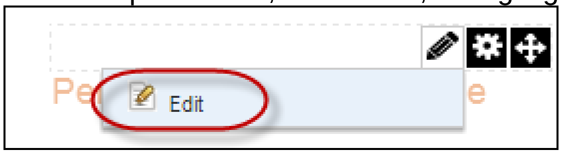
Configuring the Customer Address Web Module

The Customer Address web module allows customers to add or modify their address(es), as well as designate shipping preferences for purchases made through your website. The Customer Address web module contains a number of options and configurations that you can easily set from the web module window.

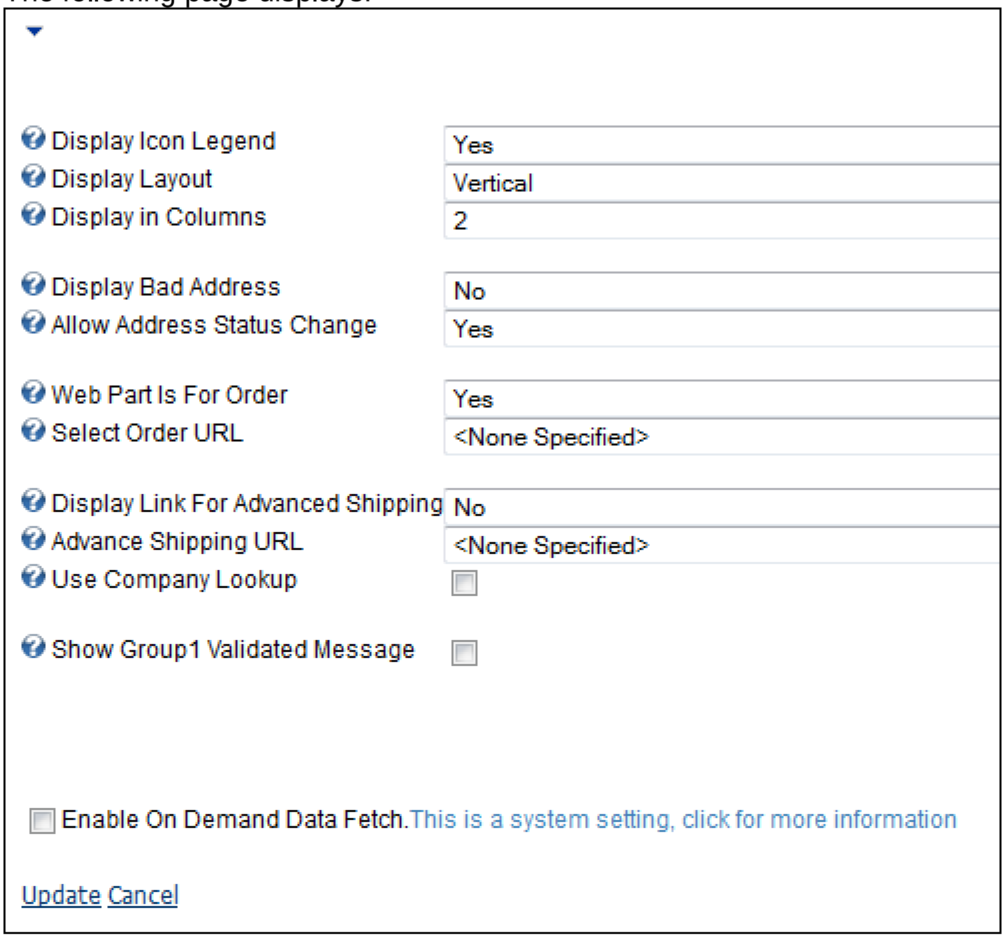
To configure the Customer Address web module:

1) Log into your site as Host.
2) Navigate to the appropriate page on your site where you want to add the Customer Address web module.
3) Add the **Personify – Customer Address** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.

4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

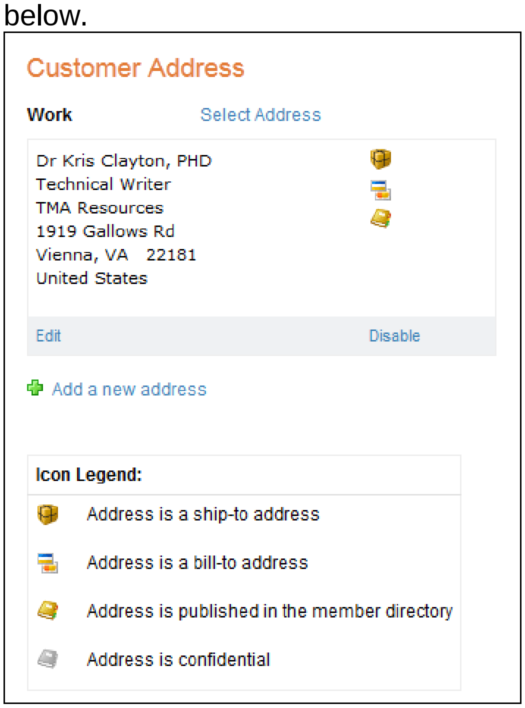
(1) **Display Icon Legend** - Drop-down. This options lets you decide whether or not to display an icon legend table below the address.
(2) **Display Layout** - Drop-down. This option lets you determine if the data should be displayed horizontally or vertically.
(3) **Display in Columns** - Drop-down. This option lets you set the number of columns that you want in your tabular result (minimum=1, maximum= 10).
(4) **Display Bad Address** - Drop-down. This option lets you determine whether or not to display disabled addresses in the address listing.
(5) **Allow Address Status Change** - Drop-down. This option lets you determine whether to enable or disable the address. This field causes an additional link to be displayed. The address status is changed when the link is clicked.

(6) **Web Part is for Order** - Drop-down. This option lets you determine whether or not to use the web module during check out. The user can select an address for Shipping Information or Billing Information. If this option is set to Yes, the Display Bad Address setting is set to No.
(7) **Select Order URL** - Drop-down. This option is also used during check out. Once the customer selects a Bill or a Ship address, this URL takes them to the next page.
(8) **Display Link for Advanced Shipping** - Drop-down. This option lets you navigate to the advanced shipping page from this page. The web module must be used in the checkout process, as set in Web Part Is For Order.
(9) **Advanced Shipping URL** - Drop-down. This option takes the customer to the Advanced Shipping page that was enabled via link using the Display Link For Advanced Shipping option above.
(10) **Use Company Lookup** - Checkbox. This setting determines whether or not to look up the customer's company in your database.
(11) **Show Group1 Validated Message** - Checkbox. This setting determines whether or not to display a validation message when the address is validated using Group1.

6) Click **Update**.

Customer Impact

After configuring the Customer Address web module, it may appear to your customers as seen below.



Each of the customer's addresses displays. The customer can add or edit any of their addresses by clicking the corresponding links.

Configuring the Emergency Contacts Web Module

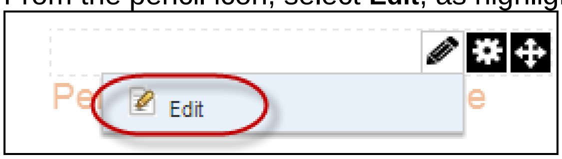
The Emergency Contact web module allows your customers to add emergency contact information.

To configure the Emergency Contacts web module:

1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Emergency Contacts web module.

3) Add the **Personify – Emergency Contacts** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The Edit Emergency Contacts Module screen displays as shown below.

5) Select the template in which you want the module to appear.

6) Click **Update**.

Customer Impact

After setting up the Emergency Contact web module, it may appear to your customers as below:

Clicking **Add new Emergency Contact**, allows your customer to enter new emergency contact information.

You customers can add multiple emergency contacts and choose to list them by priority.

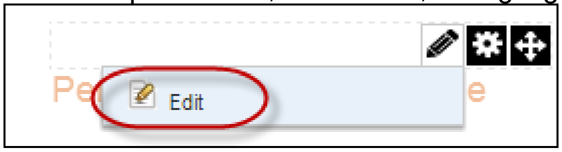
Configuring the Certification Listing Web Module

The Certification Listing web module allows associations to make certification programs available on the Web. This module displays information on certification setup in the back office to be available on the Web. This web module works in conjunction with the Certification Detail web module.

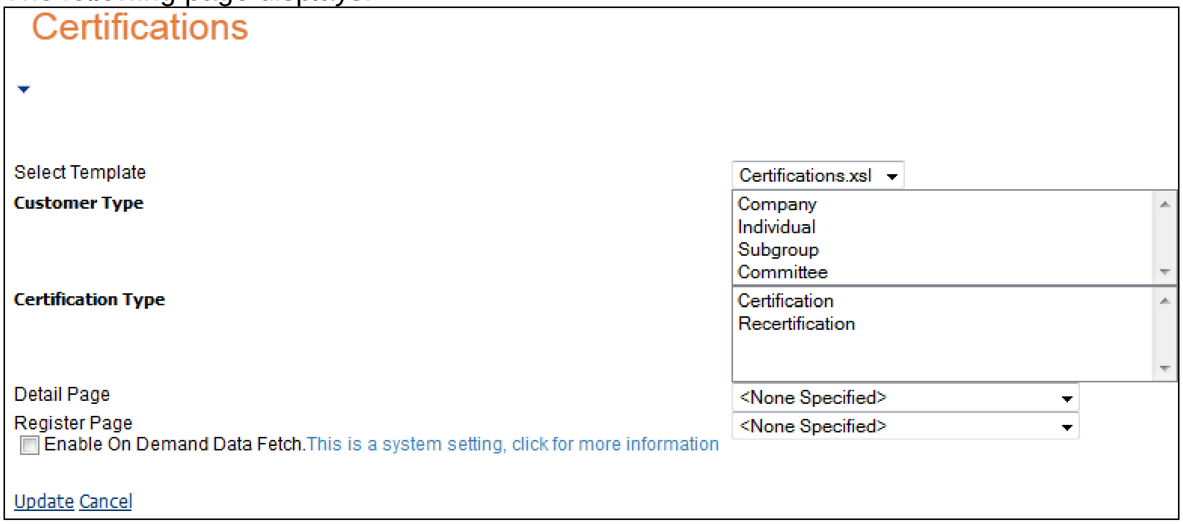
Once you have installed and set up your web module so that it is displayed in your site, you must configure it to work with your website.

To configure the Certification Listing web module:

1) Log into your site as Host.
2) Navigate to the appropriate page on your site where you want to add the Certification Listing web module.
3) Add the **Personify – Certification Listing** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



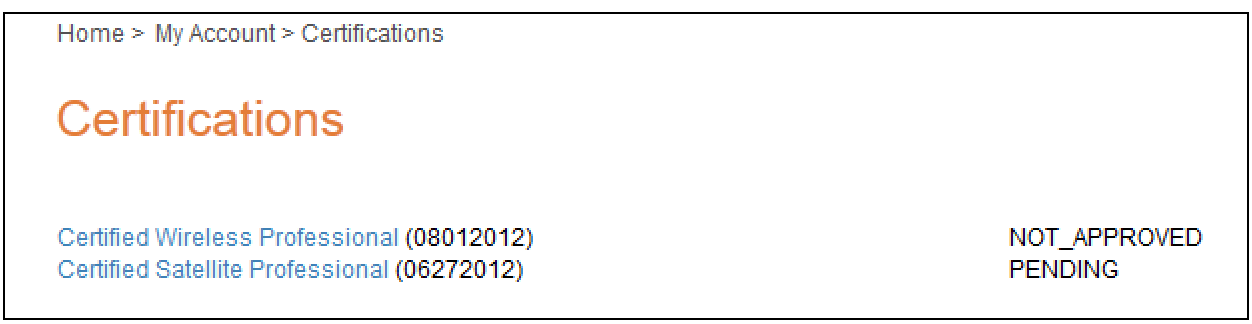
5) Configure the appropriate module settings as described below:

   (1) **Select Template** - Drop-down. This drop-down lets you select the desired template to apply to your module. The available template is called Certifications.xsl.
   (2) **Customer Type** - Text box. This option lets you select the type of customer to display.
   (3) **Certification Type** - Text box. This option lets you select the type of certification to display.
   (4) **Detail Page** - Drop-down. This drop-down lets you select which page to display to view the certification detail page.
   (5) **Register Page** - Drop-down. This drop-down lets you select which page to display to view the registration page.

6) Click **Update**.

Customer Impact

After setting up the Certification Listing web module, your customers will see the module as displayed below.



Configuring the Certification Detail Web Module

The Certification Detail web module works in conjunction with the Certification Listing web module. It allows web users to view details of a certification program, such as text describing the program along with program requirements. It can also be set up so that users who signed up for a certification program can monitor their progress in the program.

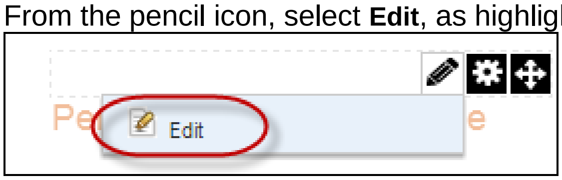
Once you have installed and set up your web module so that it is displayed in your site, you must configure it to work with your website.

To configure the Certification Detail web module:

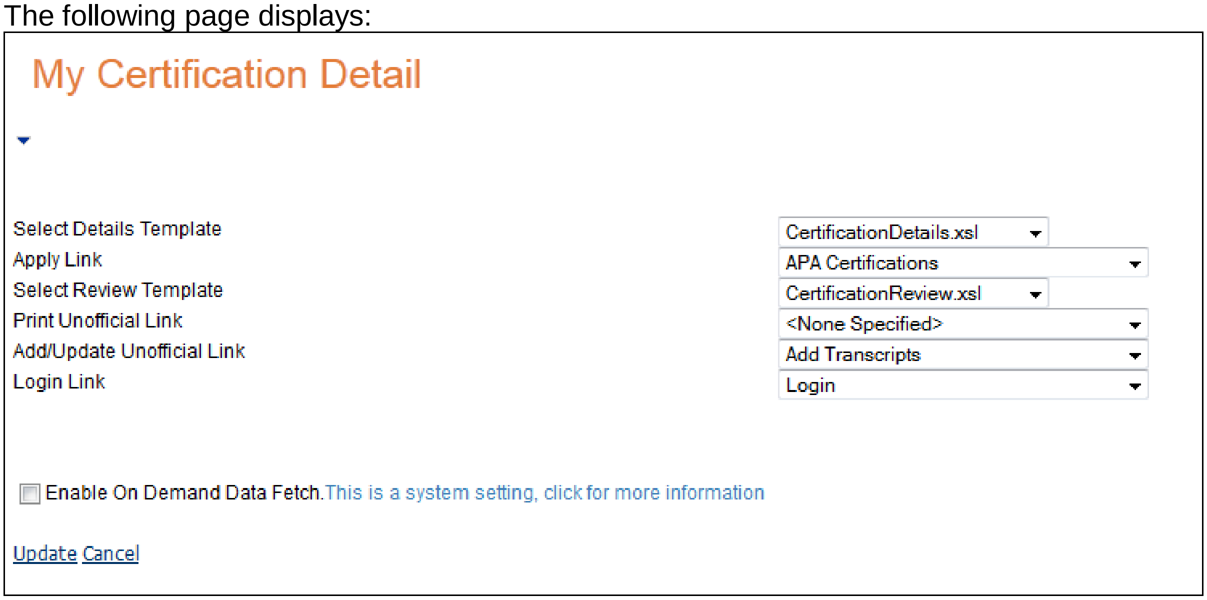
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Certification Detail web module.

3) Add the **Personify – Certificate Detail** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

a) **Select Details Template** - Drop-down. This drop-down allows you select one of the three templates that are available for displaying certification details: CertificationApplication.xsl, Certification Details.xsl, and CertificationReview.xsl.

b) **Apply Link** - Drop-down. This drop-down allows you to select the desired page to display when the Apply link is clicked.

c) **Select Review Template** - Drop-down. This drop-down allows you select one of the three templates that are available for reviewing certification details: CertificationApplication.xsl, Certification Details.xsl, and CertificationReview.xsl.

d) **Print Unofficial Link** - Drop-down. This drop-down allows you to select the desired page to display when the Print link is clicked.

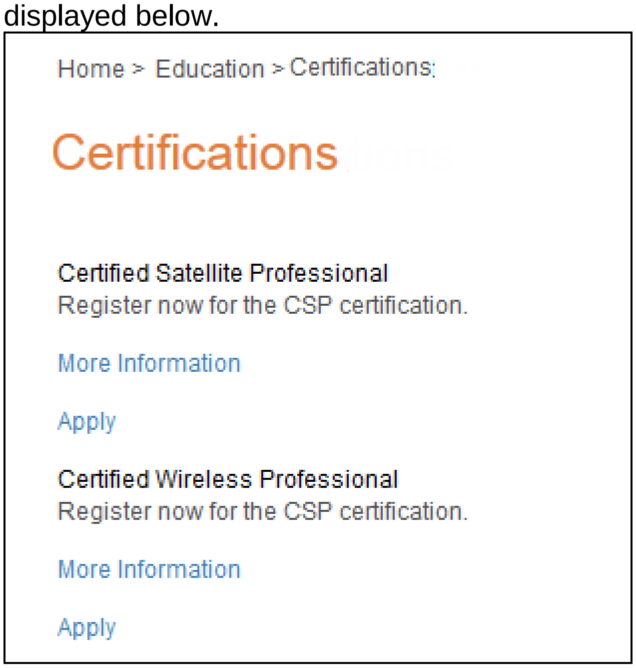
e) **Add/Update Unofficial Link** - Drop-down. This drop-down allows you to select the desired page to display when the Add/Update link is clicked.

f) **Login Link** - Drop-down. This drop-down allows you to select the desired page to display when the Login link is clicked.

6) Click **Update**.

Customer Impact

After setting up the Certification Detail web module, your customers will see the module as displayed below.



This allows the customer to see all of their certifications and allows them to print a transcript for the certification, as well as add a new transcript for the certification.

Configuring the My Certifications Web Module

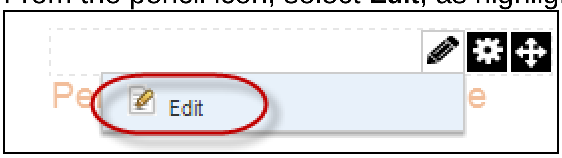
The My Certification web module can be added to the account profile area of a website. It allows users to view the status of their certification progress. Once you have installed and set up your web module so that it is displayed in your site, you must configure it to work with your website.

To configure the Certification Detail web module:

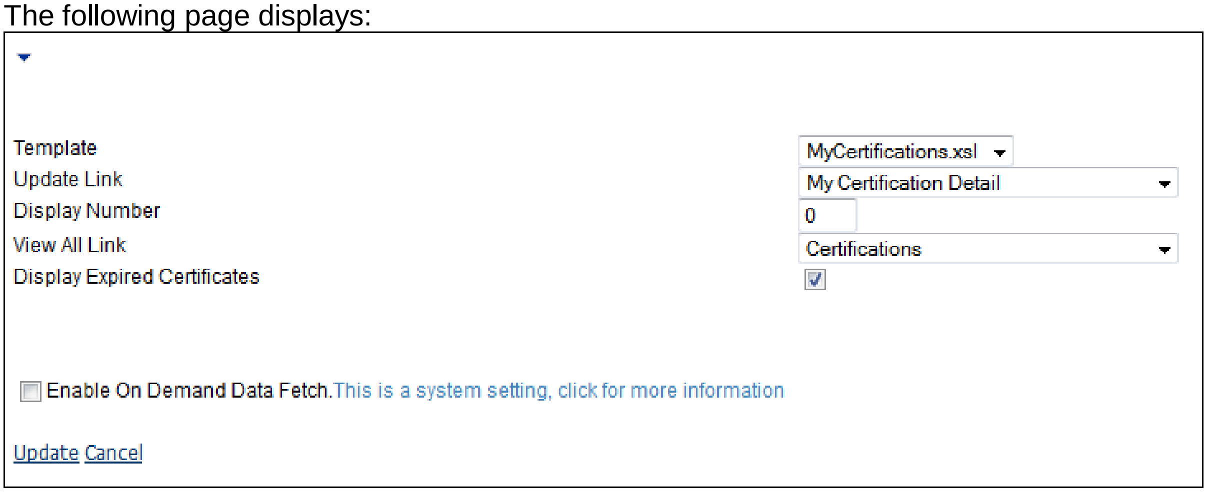
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the My Certifications web module.

3) Add the **Personify – My Certifications** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



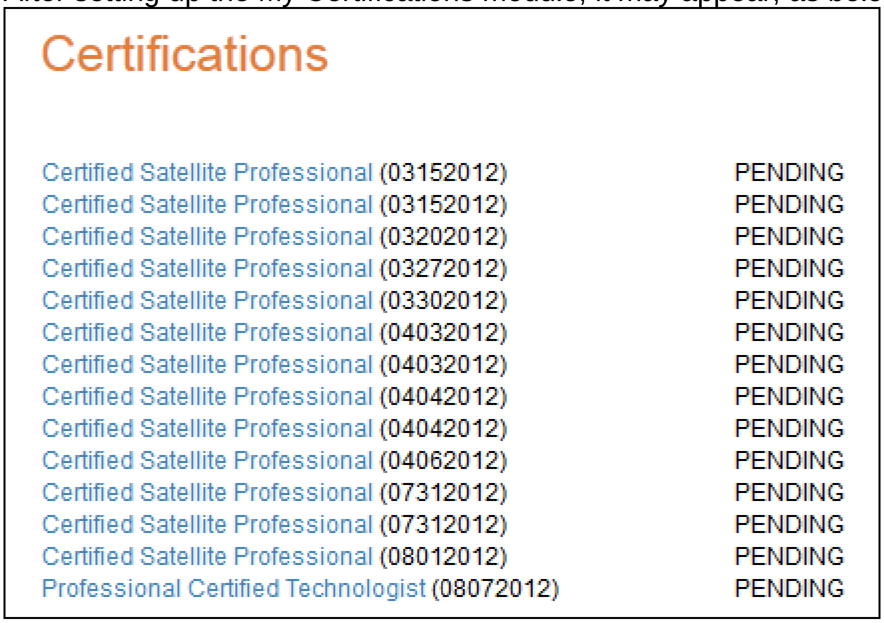
5) Configure the appropriate module settings as described below:

   a) **Template** - Drop-down. This setting determines which template is applied to the module. The default selection is MyCertifications.xsl.
   b) **Update Link** - Drop-down. This setting determines which page to display when the Update link is clicked.
   c) **Display Number** - Text box. This field determines the number of certifications to display.
   d) **View All Link** - Drop-down. This setting determines which page to display when the View All link is clicked.
   e) **Display Expired Certificates** - Checkbox. When checked, all of the customer's expired certifications display.

6) Click **Update**.

Customer Impact

After setting up the My Certifications module, it may appear, as below, to your customer.



Clicking on one of the certifications takes the customer to the Certification Detail module.

Configuring the My Transcripts Web Module

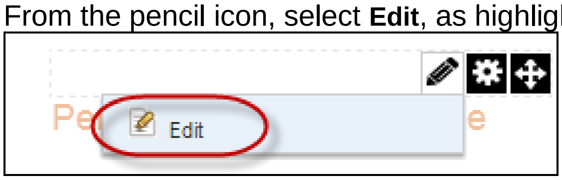
The My Transcripts module can be setup to allow web users to view their transcript information as either summary or detail transcript information. Once you have installed and set up your web module so that it is displayed in your site, you must configure it to work with your website.

To configure the My Transcripts web module:

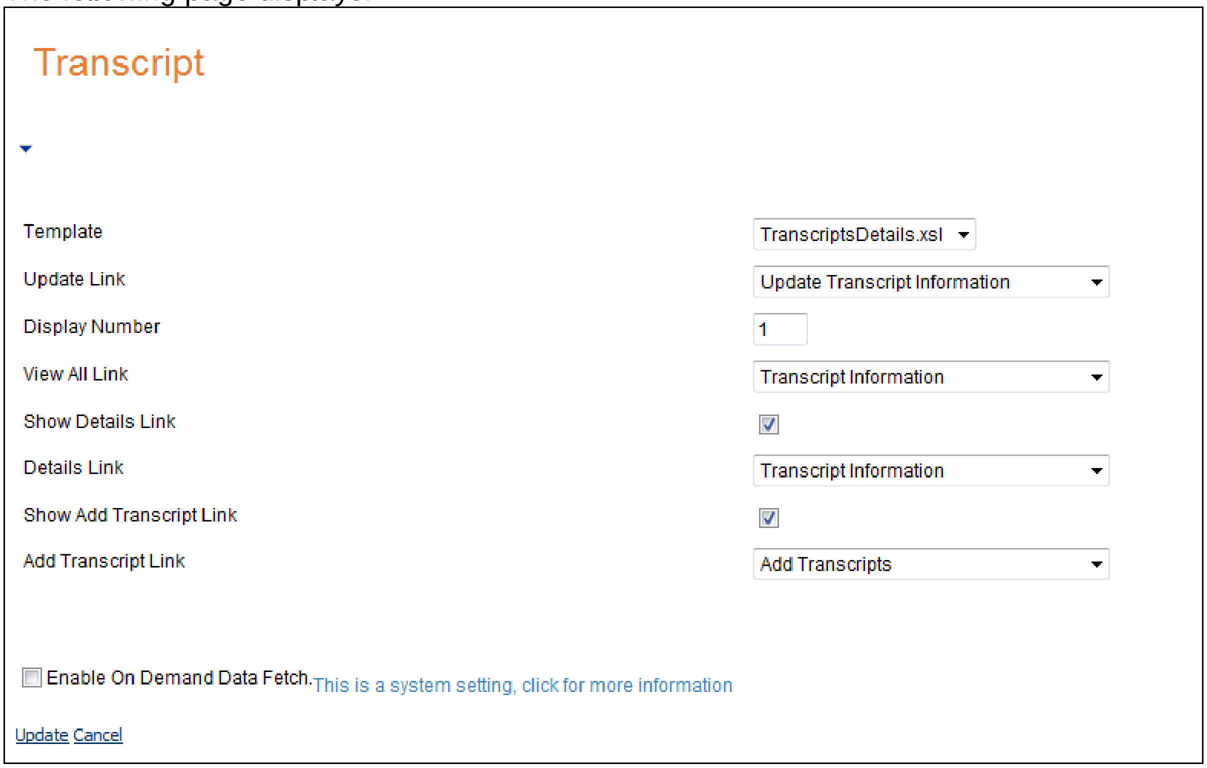
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the My Transcripts web module.

3) Add the **Personify – My Transcripts** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



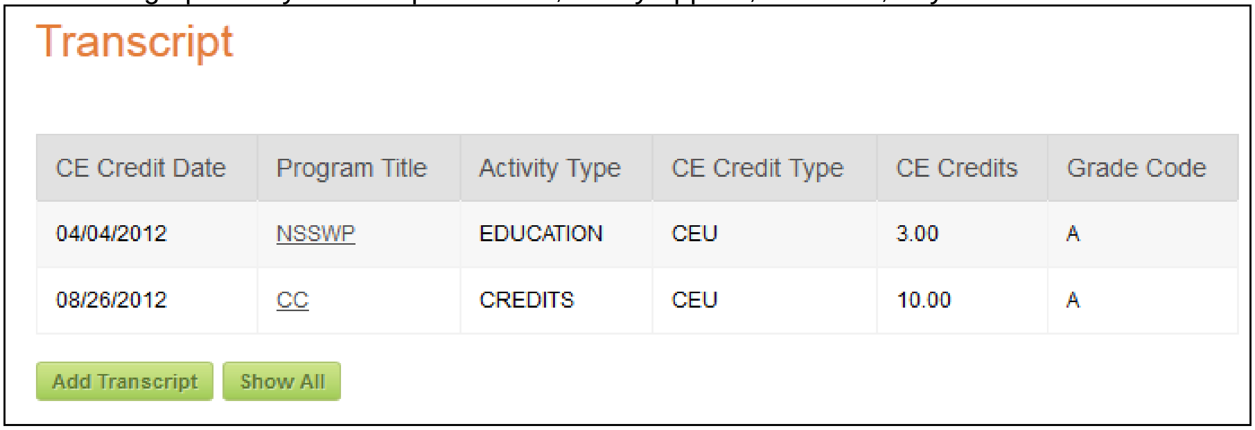
5) Configure the appropriate module settings as described below:

   a) **Template** - Drop-down. This setting allows you to select the template in which the My Transcripts module displays.
   b) **Update Link** - Drop-down. This setting allows you to choose the webpage on your site a customer is directed to upon clicking the Update link.
   c) **Display Number** - Text box. This setting allows you to determine how many transcripts to display in the module.
   d) **View All Link** - Drop-down. This setting allows you to choose the webpage on your site a customer is directed to upon clicking the View All link.
   e) **Show Details Link** - Checkbox. When checked, the Details link displays in the module.
   f) **Details Link** - Drop-down. This setting allows you to choose the webpage on your site a customer is directed to upon clicking the Details link.
   g) **Show Add Transcript Link** - Checkbox. When checked, the Add Transcript link displays in the module.
   h) **Add Transcript Link** - Drop-down. This setting allows you to choose the webpage on your site a customer is directed to upon clicking the Add Transcript link.

6) Click **Update**.

Customer Impact

After setting up the My Transcripts module, it may appear, as below, to your customer.


Transcript

CE Credit Date	Program Title	Activity Type	CE Credit Type	CE Credits	Grade Code
04/04/2012	NSSWP	EDUCATION	CEU	3.00	A
08/26/2012	CC	CREDITS	CEU	10.00	A

This module has also been configured to allow the customer to add new transcript information.

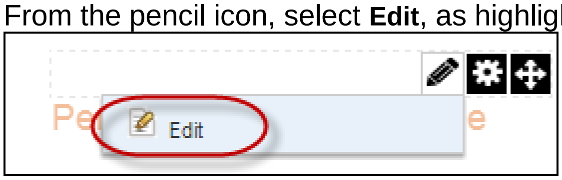
Configuring the Add Update Transcript Information Web Module

The Add Update Transcript Information web module is used in conjunction with the My Transcripts web module to display desired transcripts. Prior to using this module, you must ensure the My Transcripts web module is installed and configured. More information can be found in My Transcripts Web Module.

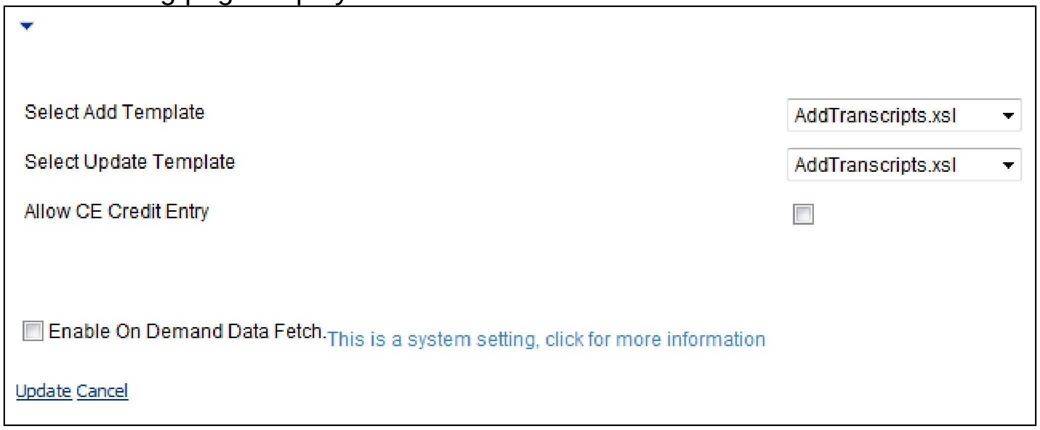
Once you have installed and set up your web module so that it is displayed in your site, you must configure it to work with your website.

To configure the Add Update Transcript Information web module:

1) Log into your site as Host.
2) Navigate to the appropriate page on your site where you want to add the Add Update Transcript Information web module.
3) Add the **Personify - Add Update Transcript** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



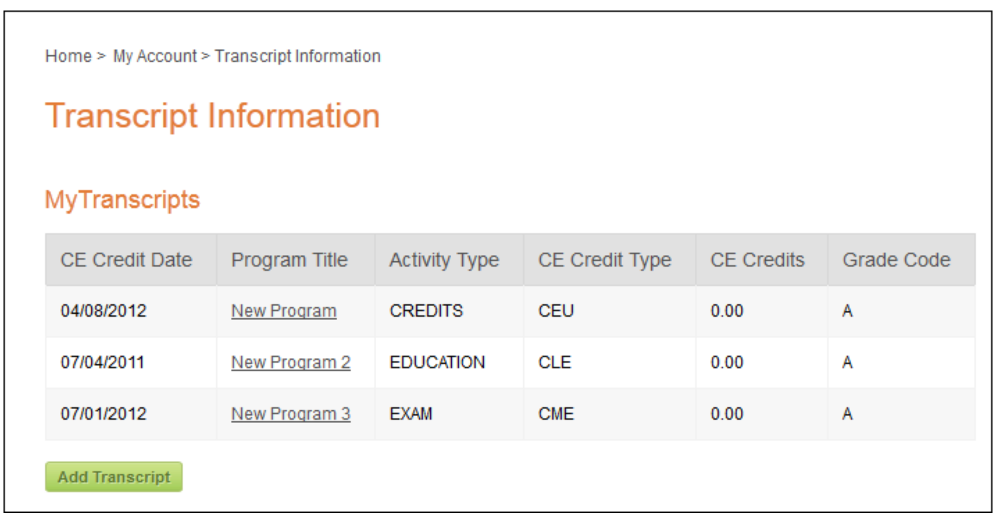
5) Configure the appropriate module settings as described below:

   a) **Select Add Template** - Drop-down. This setting allows you to apply the default template, or any customized template to the web module when adding a transcript. The default template is AddTranscripts.xsl.
   b) **Select Update Template** - Drop-down. This setting allows you to apply the default template, or any customized template to the web module when updating a transcript. Personify recommends selecting UpdateTranscripts.xsl.
   c) **Allow CE Credit Entry** - Checkbox. This setting allows you to decide whether or not to allow CE Credit Entry within the web module.

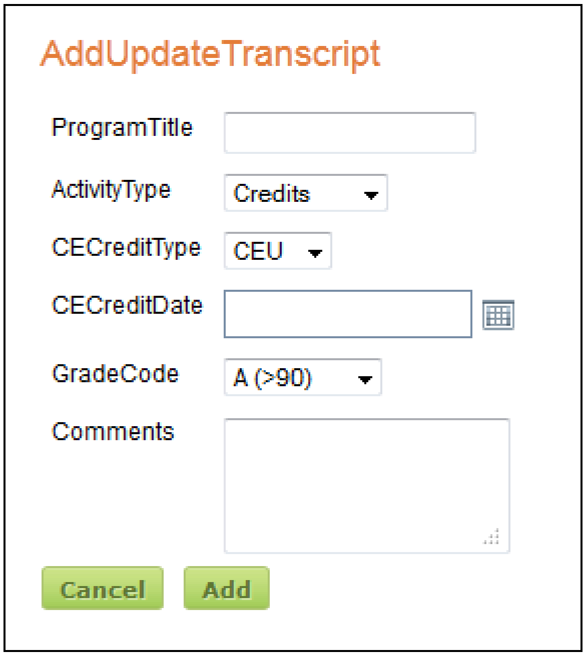
6) Click **Update**.

Customer Impact

As mentioned at the beginning of this section, you must set up the My Transcripts web module prior to setting up the Add Update Transcript module. The image below displays what the My Transcripts module may look like to your customer.



The Add Update Transcript module is viewed by your customer upon clicking the Add Transcript button. The module then displays to your customer as shown below.



Once the customer adds their transcript information, the transcript displays within the My Transcripts module.

Configuring the Customer Registration Web Module

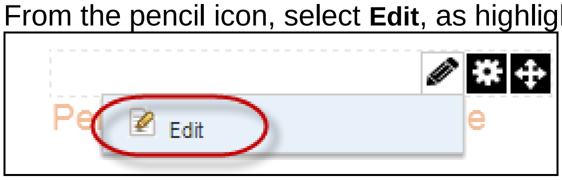
The Customer Registration web module is used to allow new customers to register with your organization via the web.

To configure the Customer Registration web module:

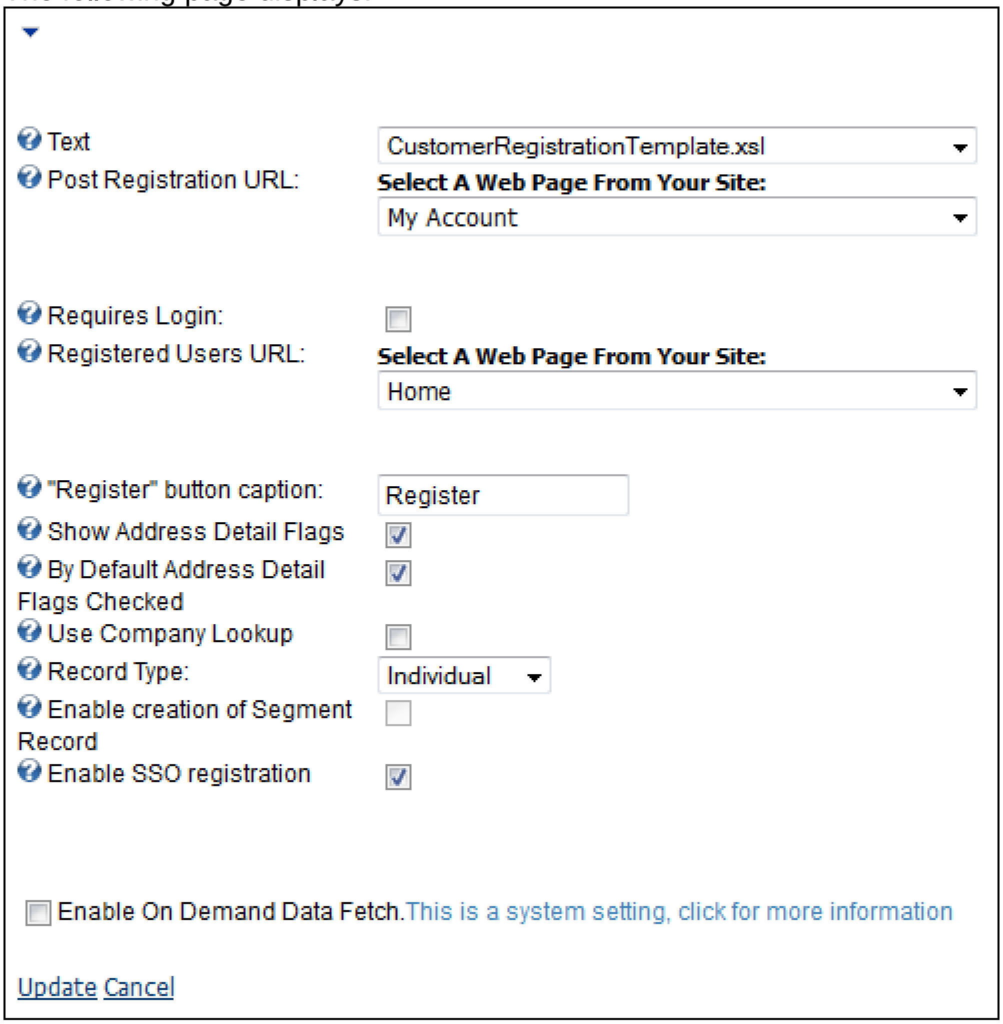
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Customer Registration web module.

3) Add the **Personify – Customer Registration** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

a) **Text** - Drop-down. Select the template in which the Customer Registration module displays in.
b) **Post Registration URL** - Drop-down. Select the page from your site to which the customer is directed to upon registering.
c) **Requires Login** - Checkbox. Select if you want to require customers to login before registering
d) **Registered Users URL** - Drop-down. Select the page from your site that a customer who is already registered with your site is directed to, if they are trying to register again.
e) **“Register” button caption** - Text box. Allows you to rename the “Register” button.
f) **Show Address Detail Flags** - Checkbox. Allows you to determine if the Address Detail flags display for a registering customer. This allows a customer to enter the address as the Primary address, Bill address, Ship address, etc.

g) **By Default Address Detail Flags Checked** - Checkbox. When checked, the Address Detail flags will be checked by default.
h) **Use Company Lookup** - Checkbox. When selected, the system will attempt to match the registering customer's company with one already listed in the database.
i) **Record Type** - Drop-down. This determines the type of customer record created after registration.
j) **Enable creation of Segment Record** - Checkbox. When checked, the customer record will also be created as a segment record after registration. This flag is only active if the Record Type selected is Company or Committee.
k) **Enable SSO registration** - Checkbox. When checked, the customer is also able to register for Single Sign-On.

6) Click **Update**.

Customer Impact

Depending on the parameters you selected when setting up the Customer Registration module, your customers will see the module similar to the one displayed below.

Note: By design, the customer class for customer's registering on the Web is hard coded to be INDIV. Any customer who registers via the Customer Registration web module will have a customer class of Individual. You must ensure that this code exists for the CUSTOMER_CLASS type in System Types and Codes.

Configuring the My Donation History Web Module

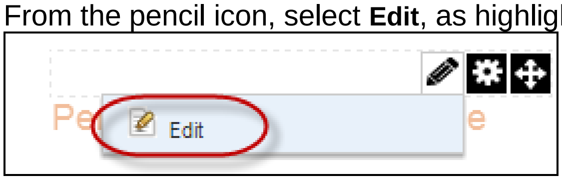
The My Donation History web module is designed to provide users with a list of their donations for a specific period of time, as well as a specific type of donation. This web module can be added to the account profile area of the website. The only setting the My Donation History web module has is to set the template.

To set the My Donation History template:

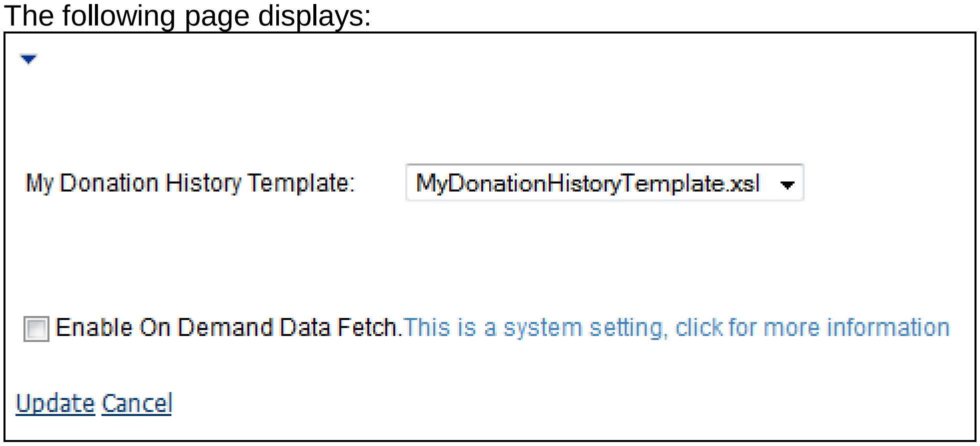
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the My Donation History web module.

3) Add the **Personify – My Donation History** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



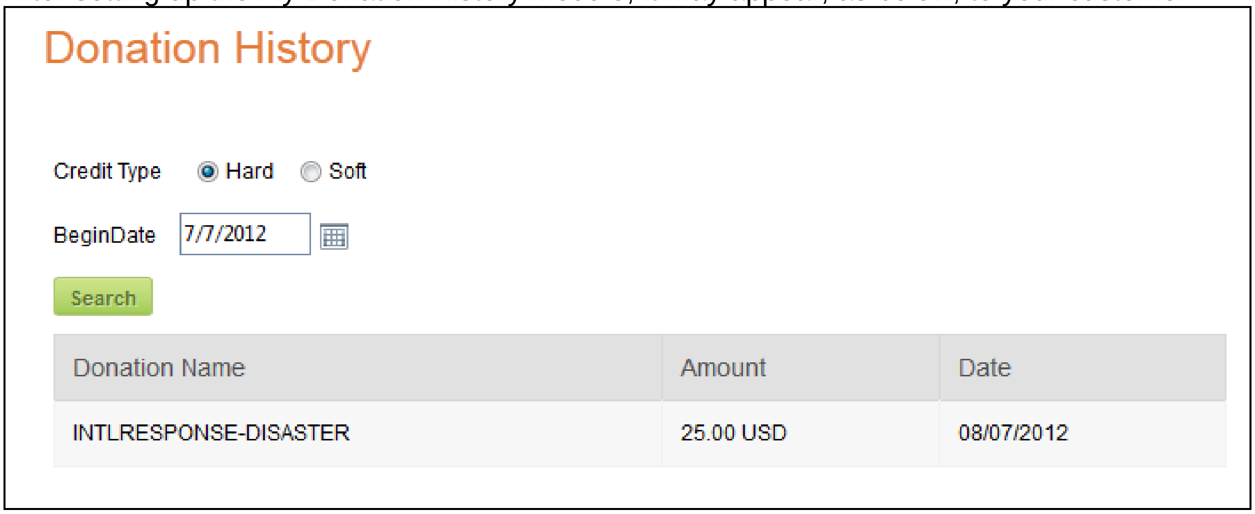
5) Configure the appropriate module settings, as described below:

   a) **My Donation History Template –** Drop-down. This setting determines the template in which the My Donation History module displays.

6) Click **Update**.

Customer Impact

After setting up the My Donation History module, it may appear, as below, to your customer.



Configuring the My Membership Info Web Module

The My Membership Info web module lists active memberships and associate memberships (if applicable) for the current member. This module also can be setup to allow users to renew their memberships from the web.

Note:

As of 7.2.3, you also have the option of setting up the Membership Renewal Web Form (M01) for your users to renew their memberships through using a step-by-step process that allows them to add/delete/renew other products, change their membership product, or change their customer information.

To configure the My Membership Info web module:

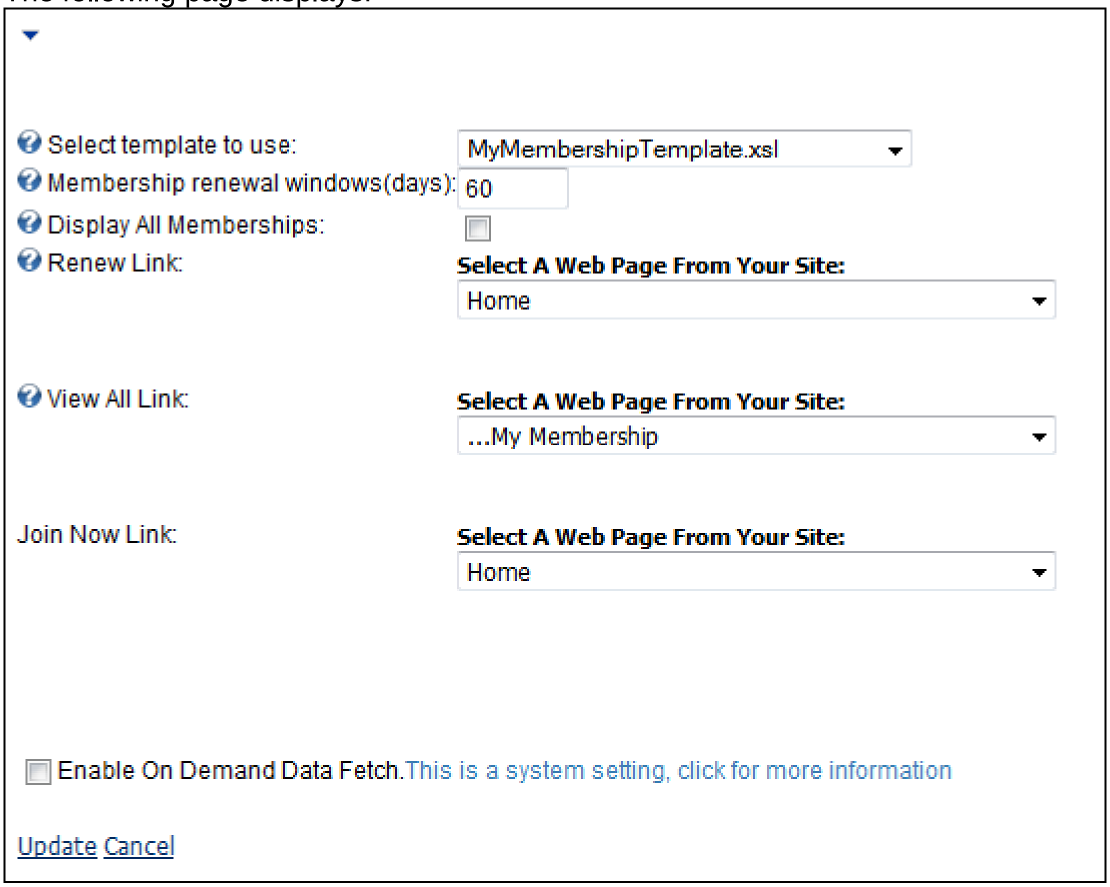
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the My Membership Info web module.

3) Add the **Personify – My Membership Info** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.

4) From the pencil icon, select **Edit**, as highlighted below.

The following page displays:



5) Configure the appropriate module settings as described below:

a) **Select template to use** - Drop-down. This setting allows you determine which template is applied to your web module. The default selection is MyMembershipTemplate.xsl
b) **Membership renewal windows (days)** - Text box. This setting is used to display the “Renew” link for memberships that are soon going to expire. The renewal date for such memberships would be calculated as Renewal Date = Expiration Date - “value in days”. If the Renewal Date is less than or equal to the current date, then the “Renewal” link gets displayed for the subscription.
c) **Display All Memberships** - Checkbox. When checked, all memberships the user is currently subscribed to display. Unchecking the checkbox restricts the display to “1”.
d) **Renew Link** - Drop-down. This setting allows you to chose the page users are redirected to when they click the “Renew” link. For example, you can link the “Renew” link to a

page with the Pay Orders module, if the Pay Orders module is configured for Pay Renewals.

Note: The renewal order must already exist for the user to be able to renew the membership.

Note: As of 7.2.3, you can also link your users to the Membership Renewal Web Form (M01), if your association set it up.

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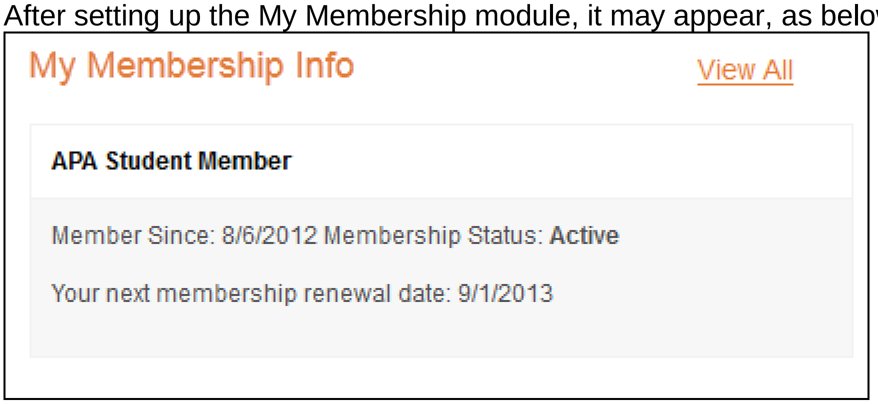
e) **View All Link** - Drop-down. This setting redirects the user to the selected page when the “View All” link is clicked.
f) **Join Now Link** - Drop-down. If the user does not have any memberships, the Join Now button will display. This setting redirects the user to the Membership Detail page.

6) Click **Update**.

Customer Impact

After setting up the My Membership module, it may appear, as below, to your customer.



This module displays the customer’s memberships and their expiration dates.

Configuring the My Orders Balance Web Module

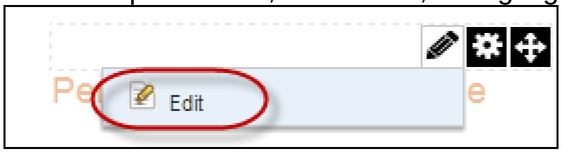
The My Order Balance web module is used to display the total order balance for a customer that is signed in to e-Business. For site administrators, this web module provides customers with a reminder that an outstanding balance exists and provides an immediate payment option.

To configure the My Orders Balance web module:

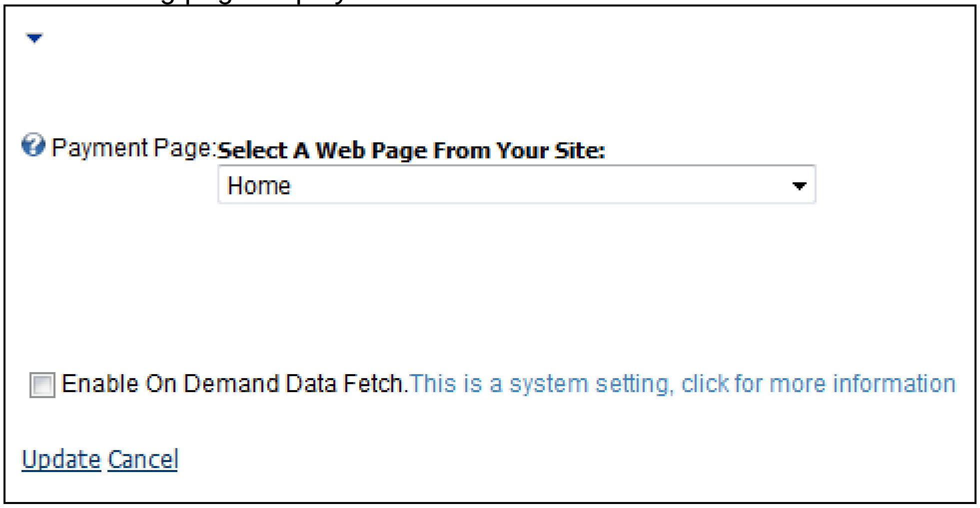
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the My Orders Balance web module.

3) Add the **Personify – My Order Balance** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:

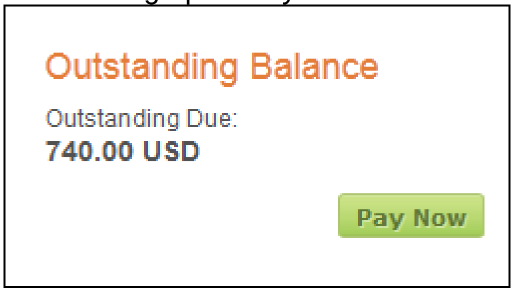


5) Configure the appropriate module settings as described below:

   a) **Payment Page** – Drop-down. This setting allows you to determine where the Pay Now button directs the customer.
6) Click **Update**.

Customer Impact

After setting up the My Order Balance module, it may appear, as below, to your customer.



Configuring the My Orders Web Module

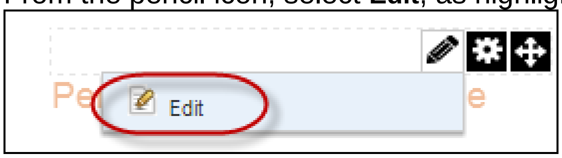
The My Orders web module acts as a search panel that allows you to look up any existing or processed orders for a customer.

To configure the My Orders web module:

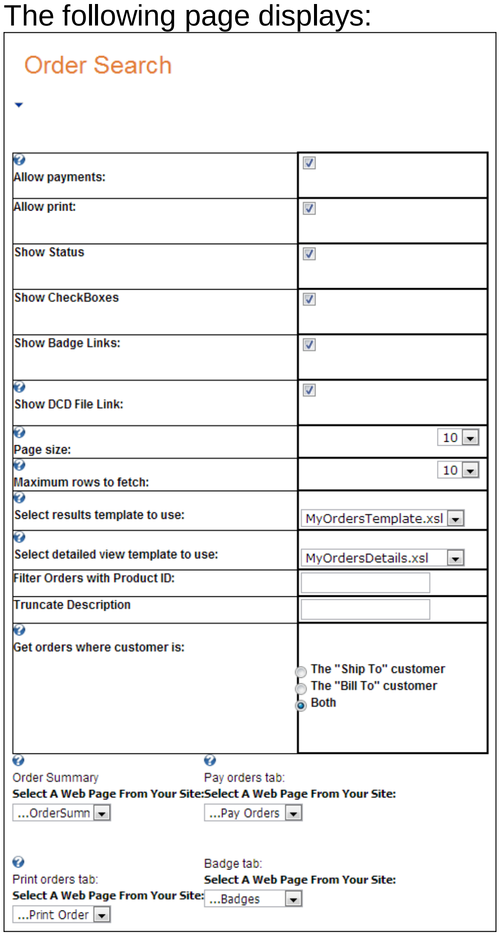
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the My Orders web module.

3) Add the **Personify – My Orders** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:

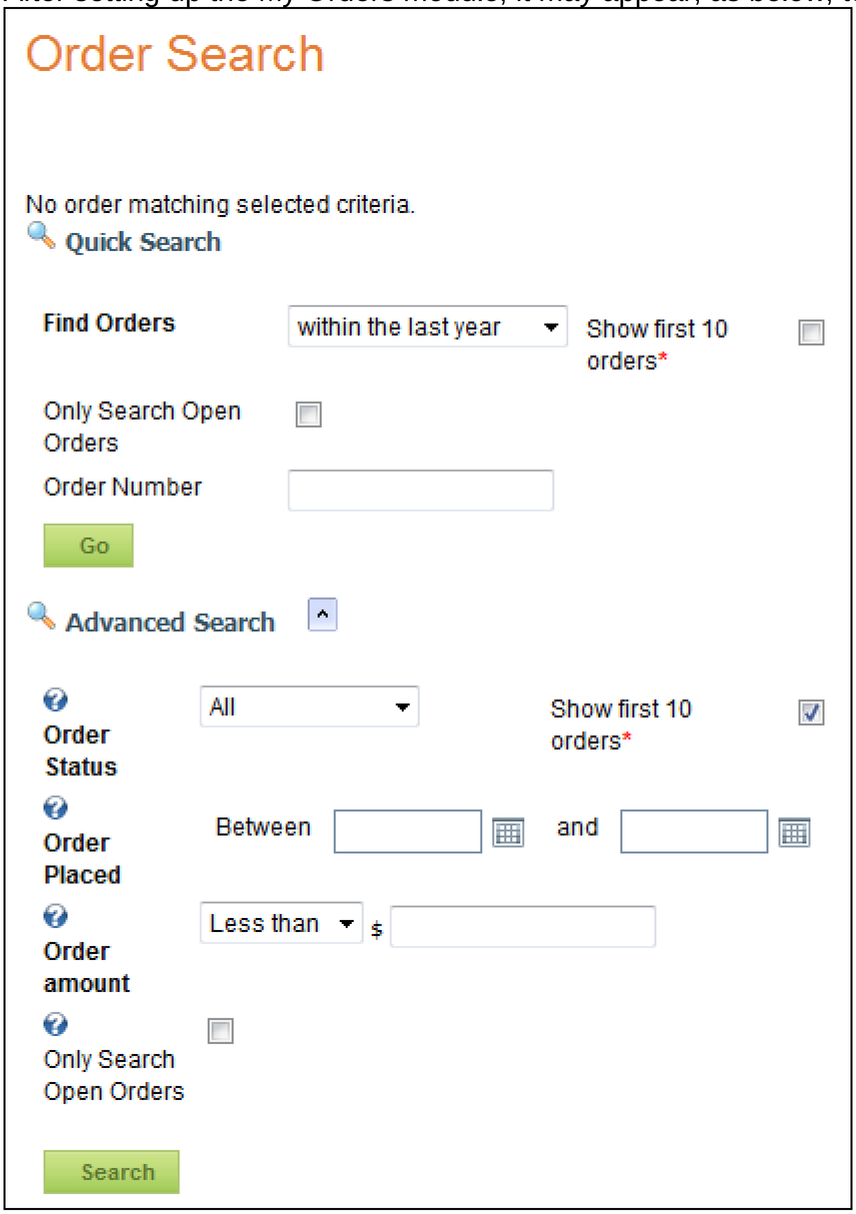


5) Configure the appropriate module settings as described below:

   a) **Allow payments** - Checkbox. When checked, customers are allowed to make payments from the My Orders web module page.
   b) **Allow print** - Checkbox. When checked, customers are allowed to print copies of their order.
   c) **Show Status** - Checkbox. When checked, the status of the customer's order displays.
   d) **Show Checkboxes** - Checkbox.
   e) **Show Badge Links** - Checkbox. When checked, customers can access badges for meeting orders via a link.
   f) **Page size** - Drop-down. This setting allows you to control the number of orders that display on the page.
   g) **Select results template to use** - Drop-down. This setting allows you to choose the template to apply when displaying results.
   h) **Select detailed view template to use** - Drop-down. This setting allows you to choose the template to apply when displaying the detailed view of an order.
   i) **Filter Orders with Product ID** - Text box. Allows you to enter a specific product ID by which to filter orders.
   j) **Truncate Description** - Text box. This setting allows you to define a maximum character length of the product's description. By default, the entire (long) description is shown.
   k) **Get orders where customer is** - Radio button. This setting determines whether to display order information where the customer is the ship-to customer, bill-to customer, or both.
   l) **Order Summary** - Drop-down. This setting determines the page to which the customer is directed to upon clicking the Order Summary button.
   m) **Pay orders tab** - Drop-down. This setting determines the page to which the customer is directed to upon clicking the Pay Orders button.
   n) **Print orders tab** - Drop-down. This setting determines the page to which the customer is directed to upon clicking the Print Orders button.
   o) **Badge tab** - Drop-down. This setting determines the page to which the customer is directed to upon clicking the Badges button.
   p) **Show first 30 orders**- Checkbox. As of 7.4.2, when checked, by default it will only show the first thirty orders. If this checkbox is unchecked, the results will override the default order settings. As a best practice, keep make sure that **Show first 30 Orders** is checked so that the most current orders are displayed.
6) Click **Update**.

Customer Impact

After setting up the My Orders module, it may appear, as below, to your customer.



A search control is presented allowing the customer to search for any products, including those not purchased via the web. As of 7.4.2, when the user checks the **Show first 30 orders** checkbox, and searches for orders, the maximum of thirty orders will display. When the user selects "Show all orders" even if the Show first 30 orders checkbox is checked, the system will override this checkbox.

Clicking the "+" sign allows the customer to see a more detailed view of the product. Clicking the Order Number allows the customer to view the Order Summary page for the order.

For meeting products, the customer also has the option to view all the badges that were awarded for the meeting product.

Configuring the Pay Orders Web Module

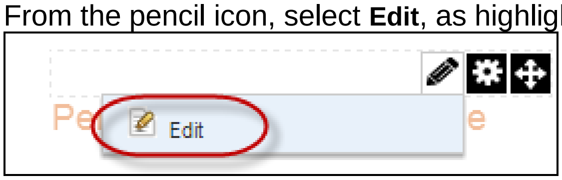
The Pay Orders web module is used for renewals, paying for orders that the customer has not yet paid for, and/or paying the remaining balance of an order.

To configure the Pay Orders web module:

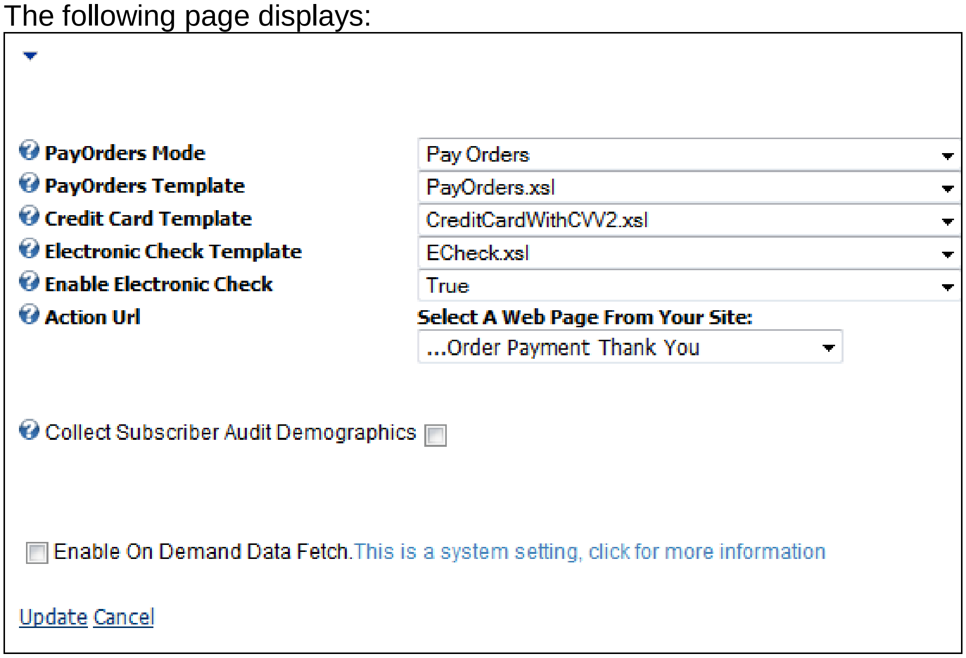
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Pay Orders web module.

3) Add the **Personify – Pay Orders** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



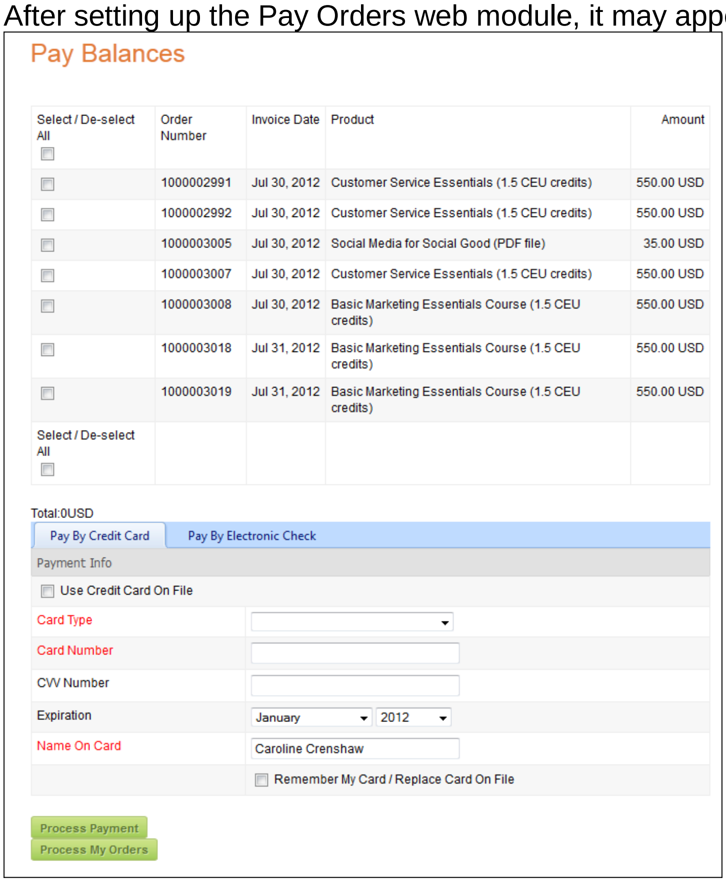
5) Configure the appropriate module settings as described below:

   (1) **Pay Orders Mode** - Drop-down. This allows you to select whether you are using your Pay Orders page to allow customers to pay for existing orders or to pay for a renewal order, such as renewing a subscription or membership.
   (2) **Pay Orders Template** - Drop-down. This allows you to select the .xsl template in which the module displays. This is PayOrders.xsl by default.
   (3) **Credit Card Template** - Drop-down. This allows you to select the .xsl template in which the credit card processing tab displays.
   (4) **Electronic Check Template** - Drop-down. This allows you to select the .xsl template in which the electronic check processing tab displays.
   (5) **Enable Electronic Check** - Drop-down. This allows you to choose whether or not you want the electronic check processing tab to display.
   (6) **Action URL** - Drop-down. This allows you to select the page on your site the customer is taken to upon completing their order.
   (7) **Collect Subscriber Audit Demographics** - Checkbox. When checked, the checkout page will display a pop-up to enter audit demographic data.

6) Click **Update**.

Customer Impact

After setting up the Pay Orders web module, it may appear, as below, to your customers:



Pay Balances

Select / De-select All	Order Number	Invoice Date	Product	Amount
	1000002991	Jul 30, 2012	Customer Service Essentials (1.5 CEU credits)	550.00 USD
	1000002992	Jul 30, 2012	Customer Service Essentials (1.5 CEU credits)	550.00 USD
	1000003005	Jul 30, 2012	Social Media for Social Good (PDF file)	35.00 USD
	1000003007	Jul 30, 2012	Customer Service Essentials (1.5 CEU credits)	550.00 USD
	1000003008	Jul 30, 2012	Basic Marketing Essentials Course (1.5 CEU credits)	550.00 USD
	1000003018	Jul 31, 2012	Basic Marketing Essentials Course (1.5 CEU credits)	550.00 USD
	1000003019	Jul 31, 2012	Basic Marketing Essentials Course (1.5 CEU credits)	550.00 USD
Select / De-select All				

Total:0USD

Pay By Credit Card | Pay By Electronic Check

Payment Info

Use Credit Card On File

Card Type	
Card Number	
CVV Number	
Expiration	January 2012
Name On Card	Caroline Crenshaw
	Remember My Card / Replace Card On File

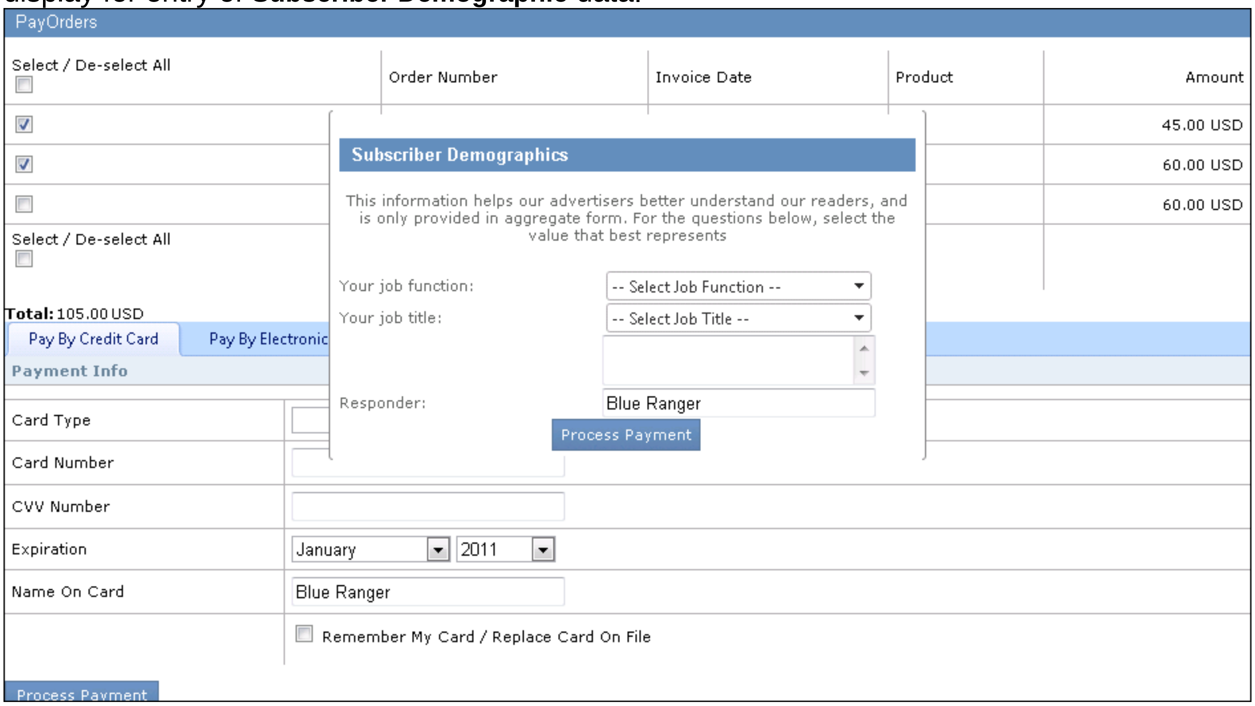
Process Payment

Process My Orders

When the customer reaches this screen, they would select the order having a remaining balance. The customer would then select either the Pay By Credit Card or Pay By Electronic Check tab, fill out the required fields and click Process Payment.

Collect Subscriber Audit Demographics option

If the option "Collect Subscriber Audit Demographics" was selected, the pop-up below will display for entry of **Subscriber Demographic** data.



Configuring the My Subscription Info Web Module

The My Subscription Info web module is used to display the active subscriptions for the member or customer logged into e-Business. This module also can be setup to allow users to renew their subscriptions from the web.

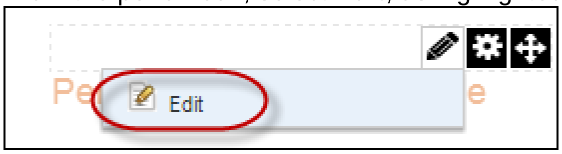
To configure the My Subscription Info web module:

1) Log into your site as Host.

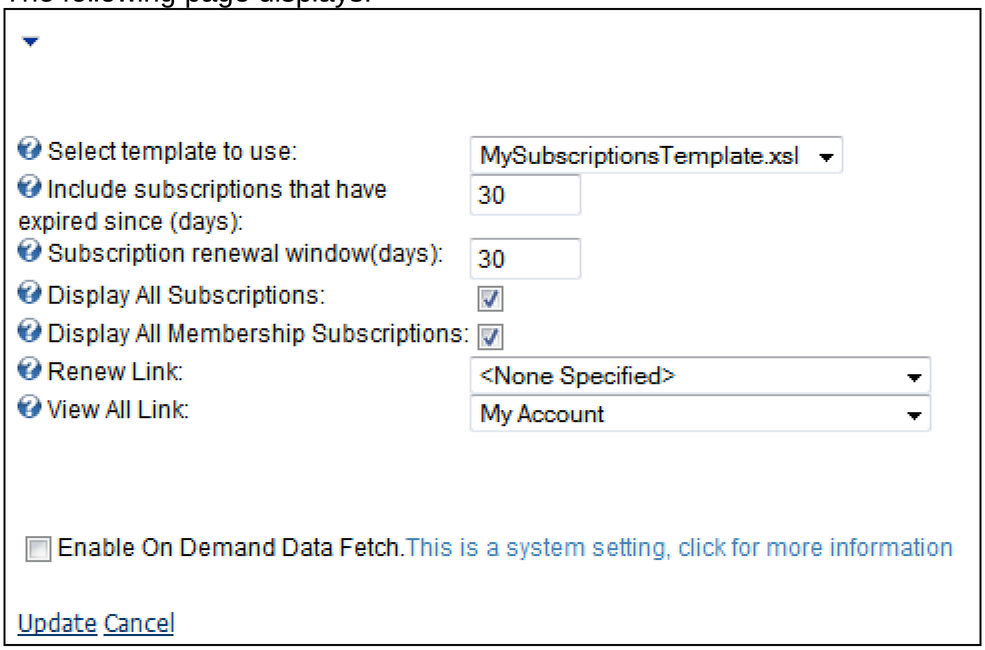
2) Navigate to the appropriate page on your site where you want to add the My Subscription Info web module.

3) Add the **Personify – My Subscription Info** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.

4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

a) **Select template to use** - Drop-down. This setting allows you to determine which template to apply to the web module.
b) **Include subscriptions that have expired since (days)** - Text box. This setting allows you to include as "active" any subscriptions that have expired within a given number of days. The default amount is "30".
c) **Subscription renewal window (days)** - Text box. This setting allows you to determine how many days before a subscription expires that a renewal option appears.
d) **Display All Subscriptions** - Checkbox. When checked, all of the customer's subscriptions display, regardless of status.
e) **Display All Membership Subscriptions** - Checkbox. When checked, a second section will display showing "My Member-Benefit Subscriptions."
f) **Renew Link** - Drop-down. This setting allows you to chose the page users are redirected to when they click the "Renew" link. For example, you can link the "Renew" link to a page with the Pay Orders module, if the Pay Orders module is configured for Pay Renewals.

Note: The renewal order must already exist for users to be able to renew their subscription.

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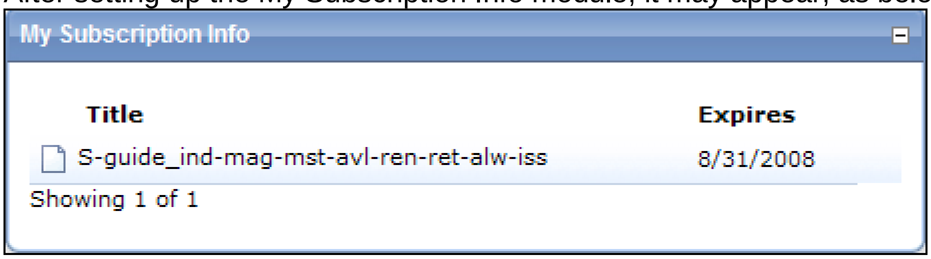
g) **View All Link** - Drop-down. This setting allows you to choose the webpage the customer is directed to upon clicking the View All button.

6) Click **Update**.

Customer Impact

After setting up the My Subscription Info module, it may appear, as below, to your customer.



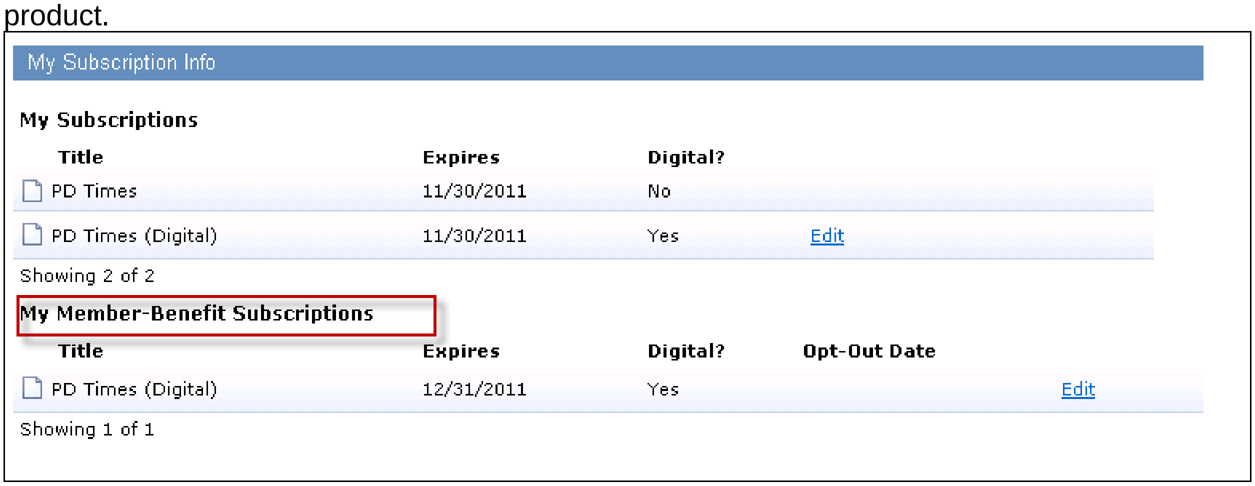
This module displays to the customer their current subscription and expiration date. It can also be configured to show expired subscriptions, as well as allow the customer to renew the subscription.

Note:

Beginning in release 7.4.0, the membership benefit subscriptions will display in this module.

Display All Membership Subscriptions

If the "Display All Membership Subscriptions" is select in the module setup, the "My Member-Benefit Subscriptions" section will display all subscriptions through the current membership product.



Switch Between Digital And Print Versions

A publication can have a print and digital version available to subscribers. At the subscription product setup level, the product setup provides a way to link the print publication product to a digital publication product. If the subscription product has been defined with a related print subscription product, the subscriber will be given the option to transfer their digital subscription to a print subscription.

- The cycle end date of the digital publication is set to the batch date minus one day, if a batch is open, or to the current date minus one day, and the fulfill status is set to "X" (Transferred).
- Initial Begin Date, Original Order Number, Original Order Line Number in the new print publication order line are set to the same values in the digital publication order line.
- Transferred From Order Number, Transferred From Order Line Number, Transferred To Order Number and Transferred To Order Line Number are set
- Receipts, transfers, refunds are prorated and transferred.

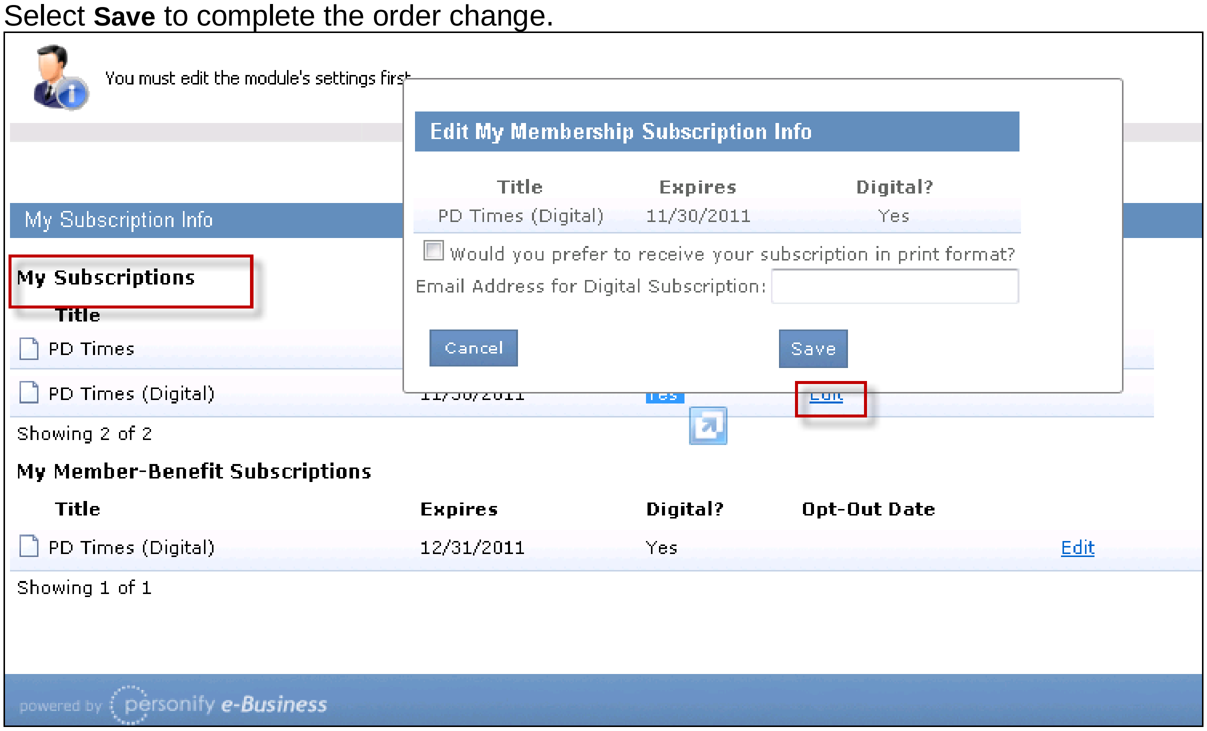
My Subscription:

1) From the My Subscriptions list select **Edit** at the end of a title.
   The Edit My Subscription Info pop-up displays.

2) Select the checkbox to change from Digital to Print.

3) Enter the email address where Digital subscriptions will be delivered.

4) Select **Save** to complete the order change.



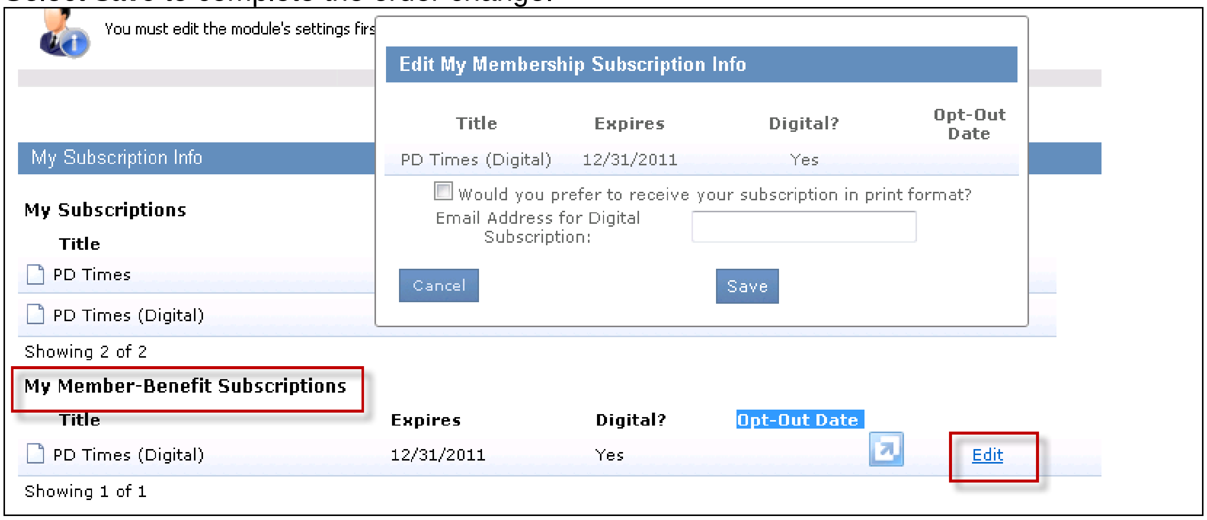
My Member-benefit Subscriptions:

1) From the My Member-Benefit Subscriptions list select **Edit** at the end of a title.
   The Edit My Subscription Info pop-up displays.

2) Select the checkbox to change from Digital to Print.

3) Enter the email address where Digital subscriptions will be delivered.

4) Select **Save** to complete the order change.



Configuring Web Modules for Orders

Configuring the Product Management Web Module

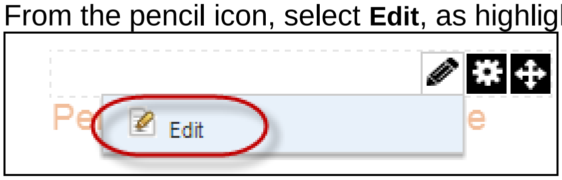
The Product Management web module allows you to set the look and feel of your products on your webpage. Using this web module you can set a picture and add the long and sort text for the product. The information you include in this web module is only visible if you are logged in as a host.

To configure the Product Management web module:

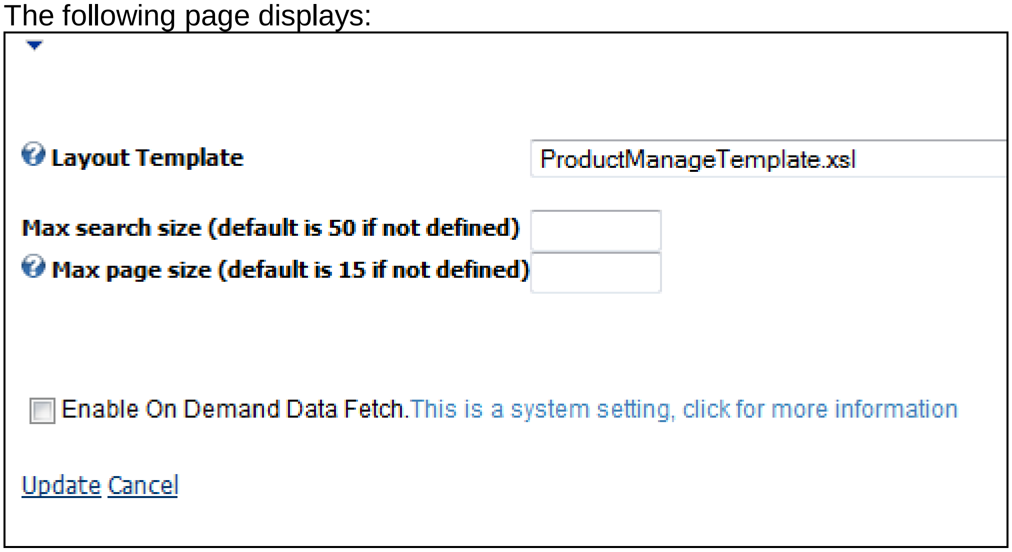
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Product Management web module.

3) Add the **Personify – Product Management** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



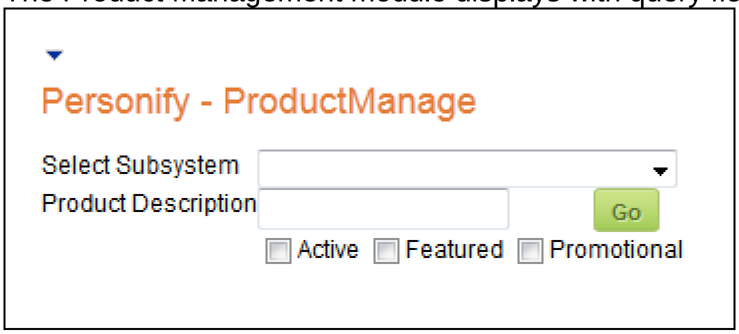
The following page displays:



5) Configure the appropriate module settings as described below:

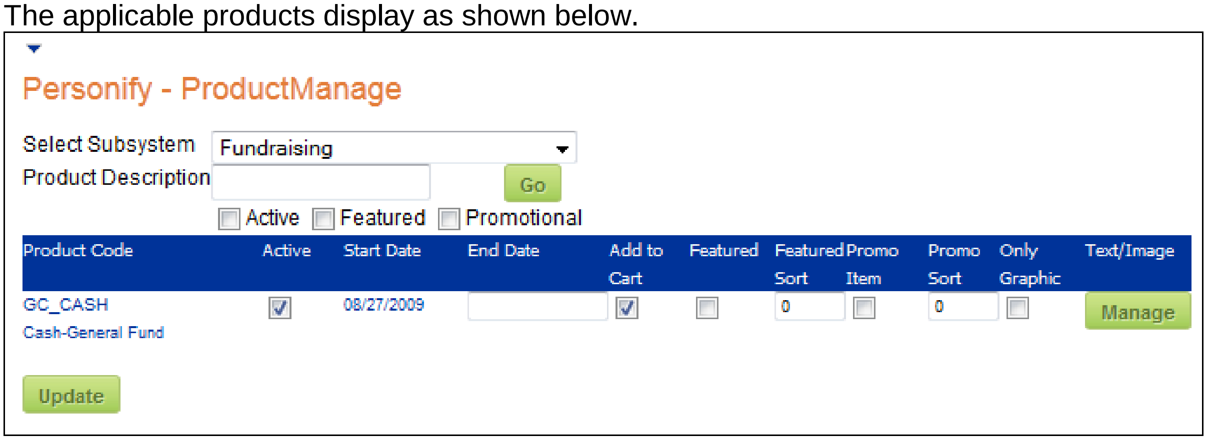
a) **Layout Template** - Drop-down. Select the temple you want to apply to the layout.
b) **Max search size (default is 50 if not defined)** - Free text field. This is the maximum amount of records to be returned before the system creates an error.
c) **Max page size (default is 15 if not defined)** - Free text field. This is the maximum amount of products that will display on the screen after a query.

6) Click **Update**.
The Product Management module displays with query fields as shown below.



7) Click the drop-down to select a subsystem.

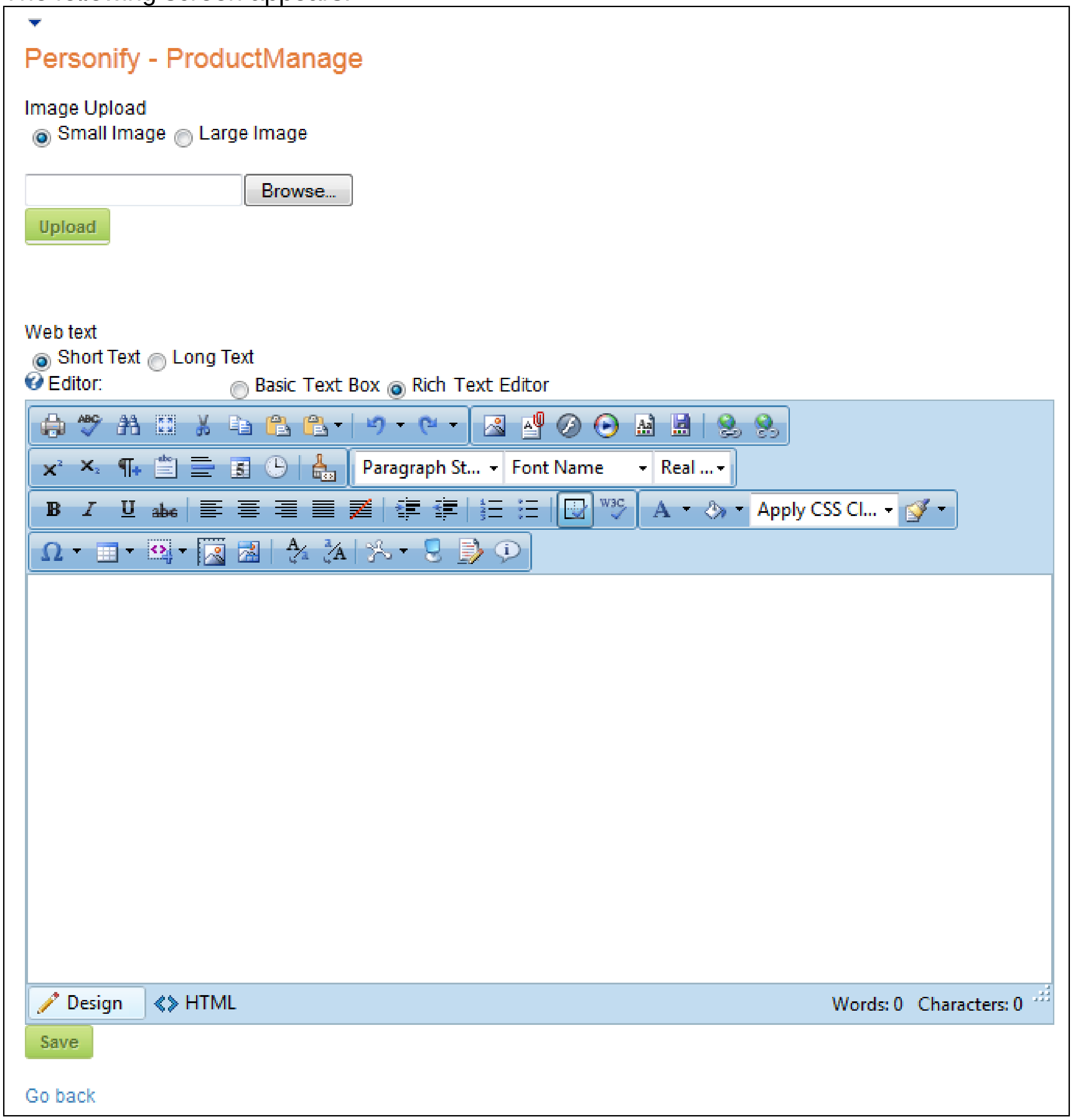
8) Click **Go**.
The applicable products display as shown below.



9) From the table view you can modify the following fields if necessary:

a) **Active** – Checkbox. Displays whether or not this is an active product.
b) **End Date** – Text field. Displays the date this product will no longer be for sale.
c) **Add to Cart** – Checkbox. Displays whether this product can be purchased
d) **Featured** – Checkbox. Displays whether this is a “featured” product.
e) **Featured Sort** – Text field. When multiple featured products occur, displays the order in which this product will display.
f) **Promo Item** – Checkbox. Displays whether this is a promotional item.
g) **Promo Sort** – Text field. When multiple promotional items occur, displays the order in which this product will display.
h) **Only Graphic** – Checkbox. Displays whether only the graphic of this product will display.

10) To manage the text and graphics that related to a product, click **Manage**.
The following screen appears:



11) Edit the applicable settings as described below:

a) **Small Image** - Radio button. Select this option, then click the Browse button to search for a small image to associate with the product.
b) **Large Image** - Radio button. Select this option, then click the Browse button to search for a large image to associate with the product.

c) **Short Text** - Radio button. Select this option, then write a short description in the text box.
d) **Long Text** - Radio button. Select this option, then write a long description in the text box.
e) **Basic Text Box** - Radio button. Select this option to change from the rich text box option to a simple text box.
f) **Rich Text Box** - Radio button. Select this option to change from the basic text box to a text box that allows you to format and change the font of your description.

12) Click **Save**.

Configuring the Product Detail Web Module

The Product Details web module completes the product catalog work-flow and enhances the user experience. This web module's primary objective is to display a product's information. This web module is a template-driven component, which enables you to define the user experience based on the product type as well as other attributes.

The Product Detail web part displays the information related to a product. This web part displays cross-sell and up-sell information, packages, electronic content (ECD), and any type of product components. This web part can also be used as a stand-alone product detail as it accepts the product ID via a URL parameter. This is especially useful for email campaigns requiring a link to products. It is also used in conjunction with the one-click checkout process.

Note: This web module must appear on the same page with the Order Create and Order Payment web modules in order to use the one-click checkout feature.

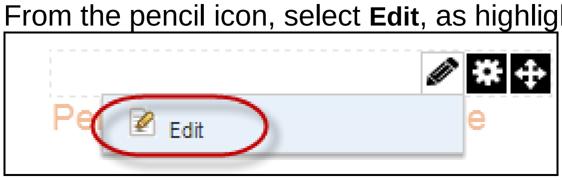
To configure the Product Detail web module:

1) Log into your site as Host.

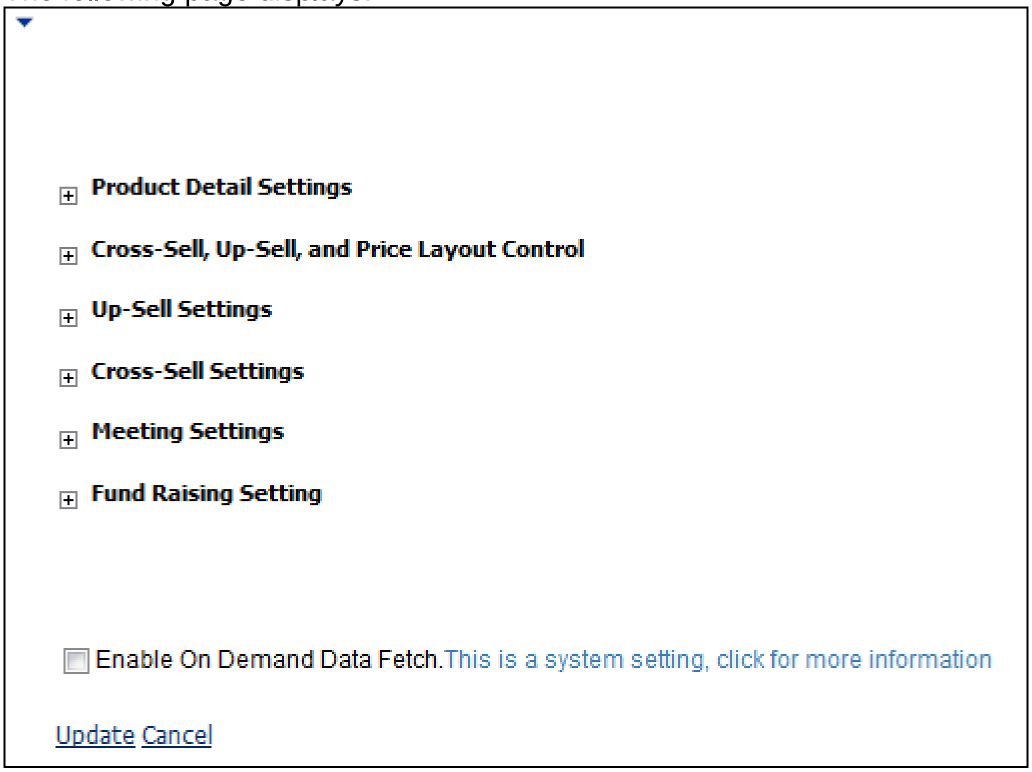
2) Navigate to the appropriate page on your site where you want to add the Product Detail web module.

3) Add the **Personify – Product Detail** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.

4) From the pencil icon, select **Edit**, as highlighted below.

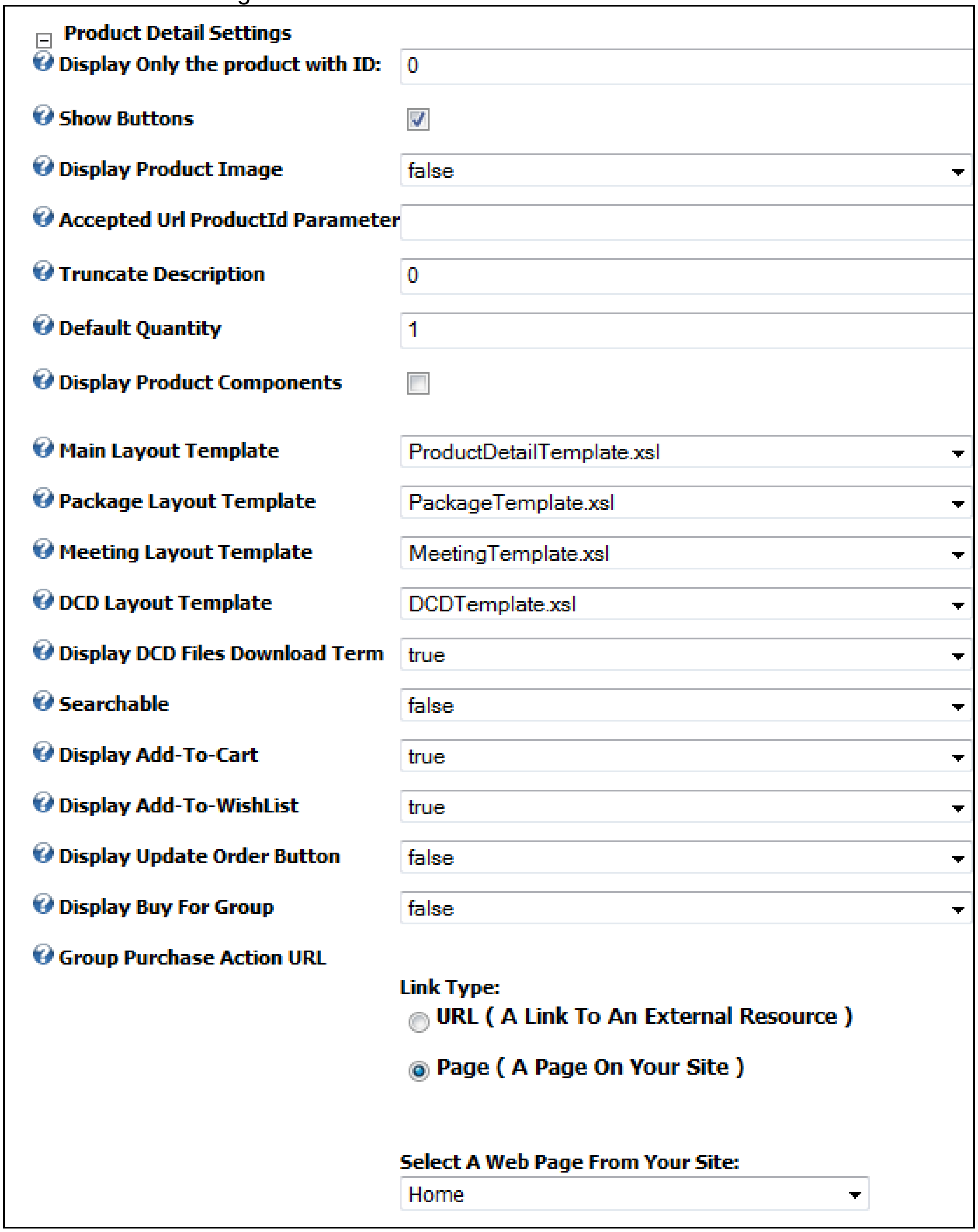


The following page displays:



5) Configure the appropriate module settings as described below:

a) Product Detail Settings:



i) **Display Only the product with ID** - Text box. This field displays the product ID. This setting can be used to set up the web module without having to depend on the product listing web module. This setting is not required for use with the one-click checkout process.

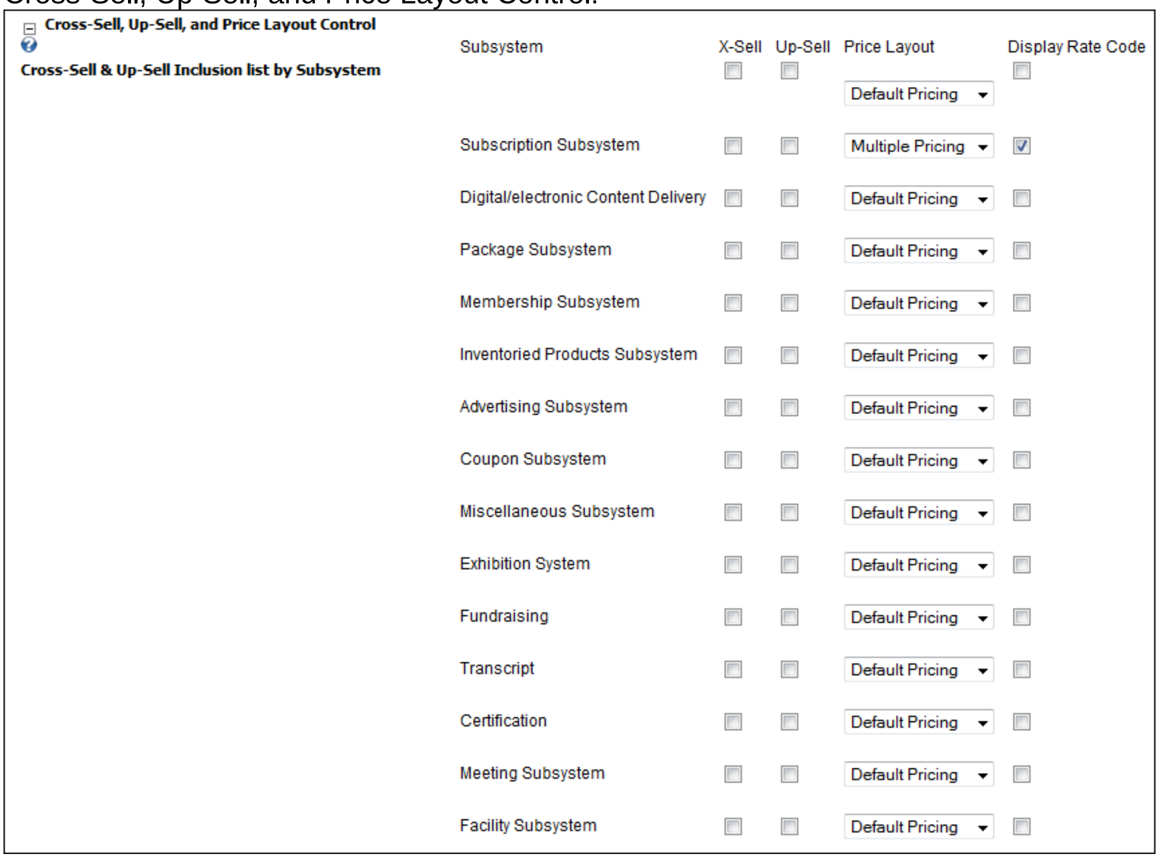
ii) **Show Buttons** - Checkbox. This option allows you to hide or display the Add to Cart, Add to Wish List, and Group Purchase buttons. If you are using the one-click checkout process, do not select this option.
iii) **Display Product Image** - Drop-down. This setting is used to hide/show the product images on the main product details section.
iv) **Accepted URL Product ID Parameter** - Text box. This setting allows you to define additional parameter keys. This is useful when integrating with third party commerce systems that are difficult to customize.
v) **Truncate Description** - Text box. This setting allows you to define a maximum character length of the product's description. By default, the entire (long) description is shown.
vi) **Default Quantity** - Text box. This setting allows you to choose the default quantity of a product when it is selected for purchase. By default, it is set to one.
vii) **Display Product Components** - Checkbox. When checked, the product you are viewing's components will also display.
viii) **Truncate Components Description** - Text box. This setting allows you to define a maximum character length of the component's description. By default the entire description is shown.
ix) **Show Components Images** - Checkbox. This setting allows you to choose whether or not any images applied to the component product display.
x) **Main Layout Template** - Drop-down. This setting lets you modify the layout of the rendered mark-up without the need of any programming knowledge other than basic knowledge of HTML, XSL (Extensible Style Sheet Language) and XSLT (Extensible Style Sheet Language Transformations.
xi) **Package Layout Template** - Drop-down. Similar to the Main Layout Template, with the exception that this template will only apply to products marked as packages (Subsystem: PCK).
xii) **Meeting Layout Template** - Drop-down. Similar to the Main Layout Template, with the exception that this template will only apply to products marked as meetings (Subsystem: MTG).
xiii) **DCD Layout Template** - Drop-down. Similar to the Main Layout Template, with the exception that this template will only apply to products marked as Digital Content Delivery (DCD) products.
xiv) **Display DCD Files Download Term** - Drop-down. This setting determines if you want to display a "terms and conditions" section the customer must agree to before purchasing the product.
xv) **Searchable** - Drop-down. This setting enables you to make your product catalog searchable. To include your Enterprise products data in the search, you must set up the Personify Product Indexer.
xvi) **Display Add-To-Cart** - Drop-down. This setting allows you to display the "Add to Cart" button for the product.
xvii) **Display Add-To-Wishlist** - Drop-down. This setting allows you to display the "Add to Wishlist" button for the product.
xviii) **Display Update Order Button** - Drop-down. This setting allows you to display the "Update Order" button. This only used for certain workflows.
For example, if you are creating a workflow where a customer can purchase sessions for a meeting, and the customer purchased the meeting in a different user-

session, the customer can select session products they want to add to their previously purchased meeting product, click Update Order, and purchase the session products.

xix) **Display Buy For Group** - Drop-down. This setting allows you to display the “Buy for Group” button for the product.

xx) **Group Purchase Action URL** - Drop-down. This setting indicates the URL where the customer is redirected for group purchases.

b) Cross-Sell, Up-Sell, and Price Layout Control:



i) **Subsystem** - Table column. Displays different subsystems for which you can set up your cross-sell, up-sell, and price layout control.

ii) **X-Sell** - Table column/checkbox. The Cross-Sell column enables Webmasters to select whether or not to display the Cross-Sell section.

iii) **Up-Sell** - Table column/checkbox. The Up-Sell column enables Webmasters to select whether or not to display the Up-Sell section

iv) **Price Layout** - Table column/drop-down. Allows you to set-up of multiple pricing levels (Rate Structures and Rate Codes). The Default Pricing option will generate a list of prices for the following rate codes:

(1) List Price

(2) Member Price

(3) My Price

Note: The My Price option only appears if the user is logged in and if the user qualifies for a price lower than the Member Price

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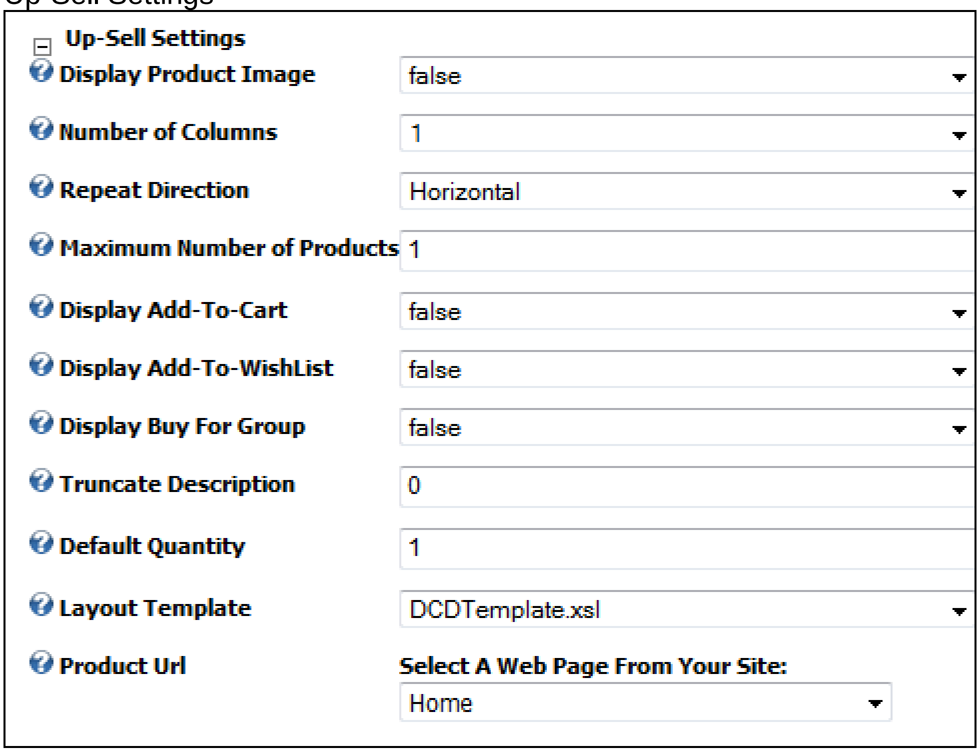
The Multiple Pricing option will generate a list of all prices for all available rate codes.

v) **Display Rate Code** - Table column/checkbox. When checked, the pricing control will display the Rate Code next to the price amount, i.e. LIST $10.00.

c) Up-Sell Settings



i) **Display Product Image** - Drop-down. This setting is used to hide/show the product images on the main product details section.

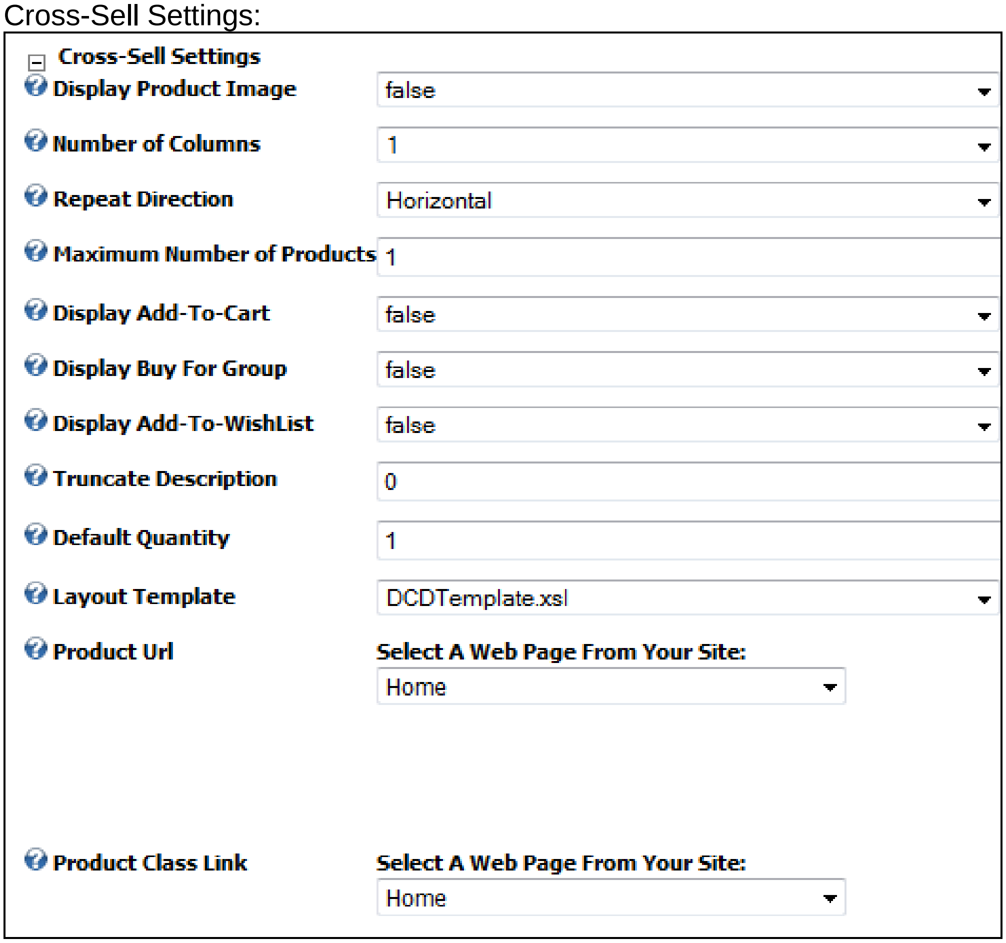
ii) **Number of Columns** - Drop-down. This setting allows you to choose the number of columns of products that display on the page.

iii) **Repeat Direction** - Drop-down. If this property is set to vertical, the items in the list are displayed in columns loaded from top to bottom, then left to right, until all items are rendered. If this property is set to horizontal, the items in the list are displayed in rows loaded from left to right, then top to bottom, until all items are rendered.

iv) **Maximum Number of Products** - Text box. This setting allows you to restrict the number of products to be displayed on the up-sell section of the product details' page.

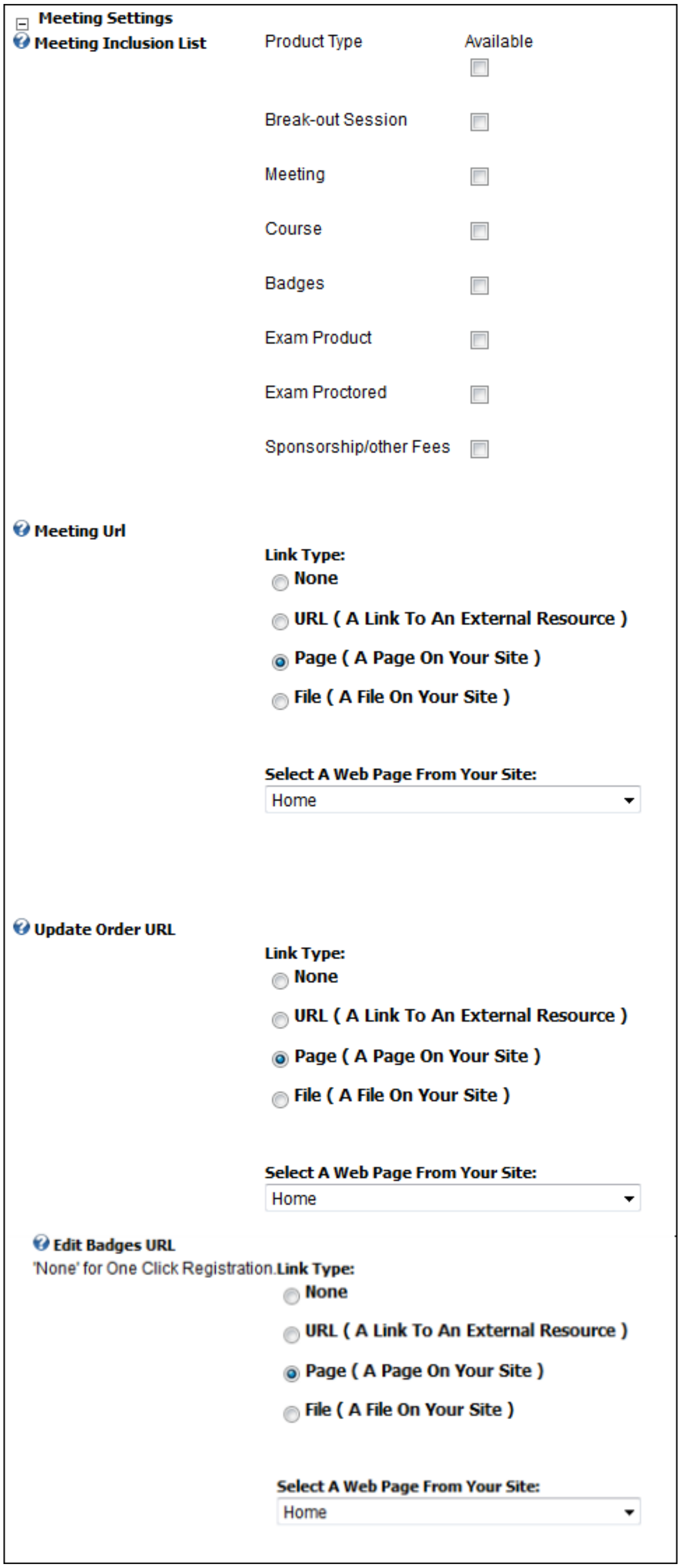
v) **Display Add-To-Cart** - Drop-down. This setting allows you to display the "Add to Cart" button for the up-sell product.
vi) **Display Add-To Wishlist** - Drop-down. This setting allows you to display the "Add to Wishlist" button for the up-sell product.
vii) **Display Buy For Group** - Drop-down. This setting allows you to display the "Buy for Group" button for the up-sell product.
viii) **Truncate Description** - Text box. This setting allows you to define a maximum character length of the component's description. By default, the entire (long) description is shown.
ix) **Default Quantity** - Text box. This setting allows you to choose the default quantity of a product when it is selected for purchase. By default, it is set to one.
x) **Layout Template** - Drop-down. This setting lets you modify the layout of the rendered mark-up without the need of any programming knowledge other than basic knowledge of HTML, XSL (Extensible Style Sheet Language) and XSLT (Extensible Style Sheet Language Transformations).
xi) **Product URL** - Drop-down. This setting lets you complete the navigation path for the up-sell product. In most cases this will be the same Product Detail, you can, however, decide to create a specific product detail page for this type of product.

d) Cross-Sell Settings:



i) **Display Product Image** - Drop-down. This setting is used to hide/show the product images on the main product details section.
ii) **Number of Columns** - Drop-down. This setting allows you to choose the number of columns of products that display on the page.
iii) **Repeat Direction** - Drop-down. If this property is set to vertical, the items in the list are displayed in columns loaded from top to bottom, then left to right, until all items are rendered. If this property is set to horizontal, the items in the list are displayed in rows loaded from left to right, then top to bottom, until all items are rendered.
iv) **Maximum Number of Products** - Text box. This setting allows you to restrict the number of products to be displayed on the up-sell section of the product details page.
v) **Display Add-To-Cart** - Drop-down. This setting allows you to display the “Add to Cart” button for the cross-sell product.
vi) **Display Buy For Group** - Drop-down. This setting allows you to display the “Buy for Group” button for the cross-sell product.
vii) **Display Add-To Wishlist** - Drop-down. This setting allows you to display the “Add to Wishlist” button for the cross-sell product.
viii) **Truncate Description** - Text box. This setting allows you to define a maximum character length of the component’s description. By default, the entire (long) description is shown.
ix) **Default Quantity** - Text box. This setting allows you to choose the default quantity of a product when it is selected for purchase. By default, it is set to one.
x) **Layout Template** - Drop-down. This setting lets you modify the layout of the rendered mark-up without the need of any programming knowledge other than basic knowledge of HTML, XSL (Extensible Style Sheet Language) and XSLT (Extensible Style Sheet Language Transformations).
xi) **Product URL** - Drop-down. This setting lets you complete the navigation path for the up-sell product. In most cases this will be the same product detail, you can, however, decide to create a specific product detail page for this type of product.
xii) **Product Class Link** - Drop-down. This setting allows you to determine where the customer is directed to upon clicking the Product Class link.

e)


Meeting Settings
Meeting Inclusion List
Product Type
Available
Break-out Session
Meeting
Course
Badges
Exam Product
Exam Proctored
Sponsorship/other Fees
Meeting Url
Link Type:
None
URL (A Link To An External Resource)
Page (A Page On Your Site)
File (A File On Your Site)
Select A Web Page From Your Site:
Home
Update Order URL
Link Type:
None
URL (A Link To An External Resource)
Page (A Page On Your Site)
File (A File On Your Site)
Select A Web Page From Your Site:
Home
Edit Badges URL
'None' for One Click Registration.
Link Type:
None
URL (A Link To An External Resource)
Page (A Page On Your Site)
File (A File On Your Site)
Select A Web Page From Your Site:
Home

i) **Meeting Inclusion List** - Table. The Meeting Inclusion List only applies when the product being viewed is a meeting. Most meeting products are defined with a list of sub-products. In most cases, the sub products are defined as break-outs, however, one can add products of other product classes as well.
Meeting Products that you can include with a meeting session are:

(1) Break-out Sessions

(2) Meetings

(3) Courses

(4) Badges

(5) Exam Products

(6) Exam Proctored

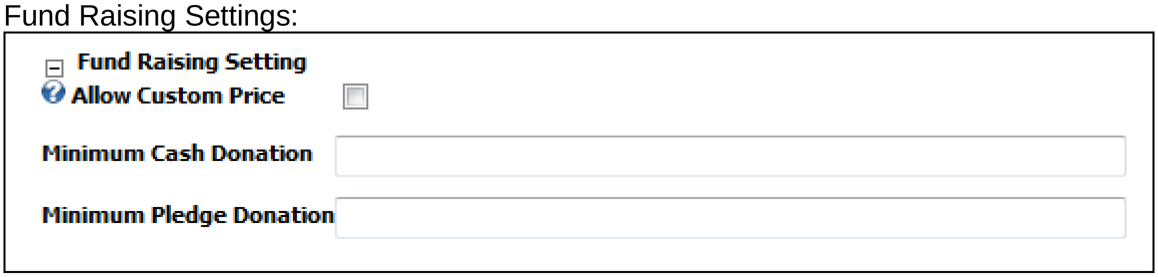
(7) Sponsorship/other Fees

ii) **Meeting URL** - Drop-down. The Meeting URL control enables the Webmaster to complete the navigation path for the meeting products. In most cases this will be the page in which a user is required to provide more information such as surveys, badge information, etc. The control automatically populates a list of pages available in your portal.
Additionally, you can specify URLs that are outside of the e-Business portal, including files that can automatically be uploaded on the Web server. This can be useful when integrating with third-party products such as Fund Raising, Certifications and Transcripts, etc.

iii) **Update Order URL** - Drop-down. Select the type of link, then click the drop-down to select the web page from your site where you would like customers redirected when they click the Update Order button.

iv) **Edit Badges URL** - Drop-down. Select the type of link, then click the drop-down to select the web page from your site where you would like customers redirected when they click the Edit Badges button. Select the None radio button if you want to use the one-click registration option.

f) Fund Raising Settings:



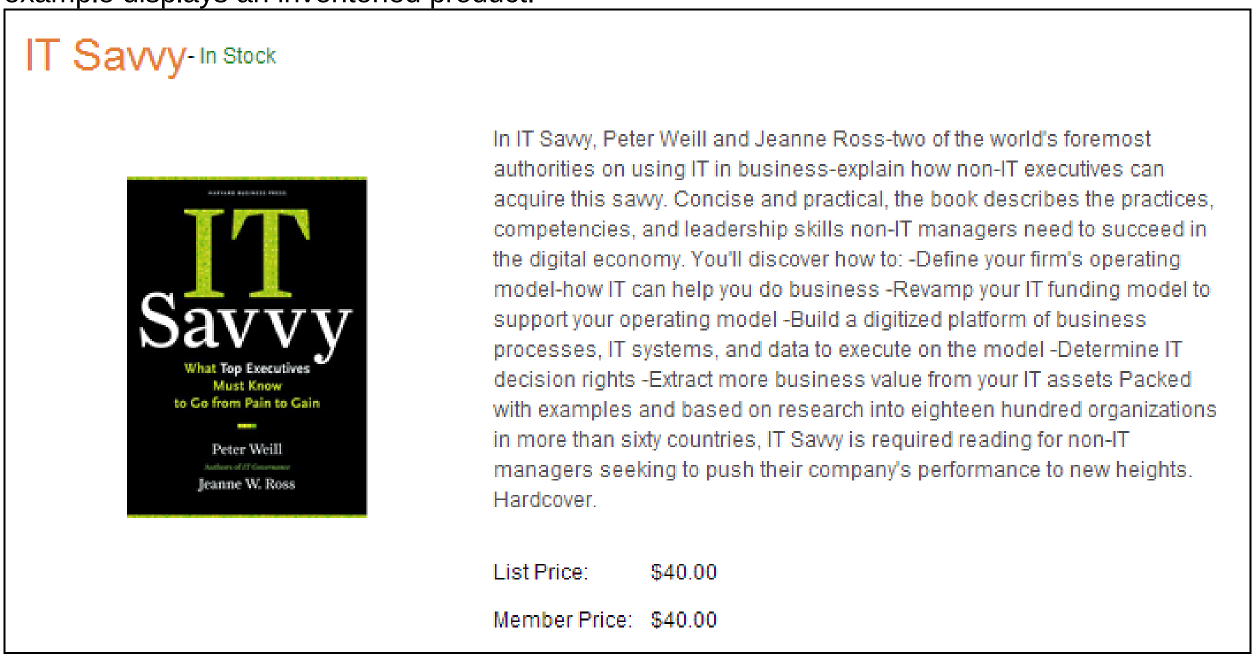
i) **Allow Custom Price** - Checkbox. This allows you to check whether you want to allow your customers to be able to enter a custom price for the donation.

ii) **Minimum Cash Donation** - Text field. Enter the minimum cash donation, if you would like to specify one.
iii) **Minimum Pledge Donation** - Text field. Enter the minimum pledge amount, if you want like to specify one.

6) Click **Update**.

Customer Impact

After setting up the Product Detail module, it may appear, as below, to your customer. This example displays an inventoried product.



Note:
If users are restricted to a maximum number of tickets to a session (as determined by the meeting setup done in the back office), the limit appears on the left side of the screen under the associated amount entry field for each session.

The system does not allow users to add more than the specified amount for each session to their cart.

After customers purchase a meeting, they can review the details of the meeting from the Product Detail page, including the session(s) purchased with it, by clicking the product link from their Shopping Cart, clicking the (+) icon next to the meeting from their Account page, or by clicking on the meeting product link from the Product Listing page.

From here, they have the option of either adding sessions to their meeting product or purchasing a separate new meeting registration (for example, for a guest).

Note: Customers are not able to modify the number of tickets associated with a meeting purchase after submitting the order through the Checkout page.

As the administrator, you can edit the ProductDetailTemplate.xsl to configure the text that appears on the screen informing customers of the option to either update the previously purchased meeting or purchase and register for the same meeting again.

Product Indexer Web Module

Product Indexer indexes your entire product catalog. Once this web module is installed and configured, users can search for specific products in your production system.

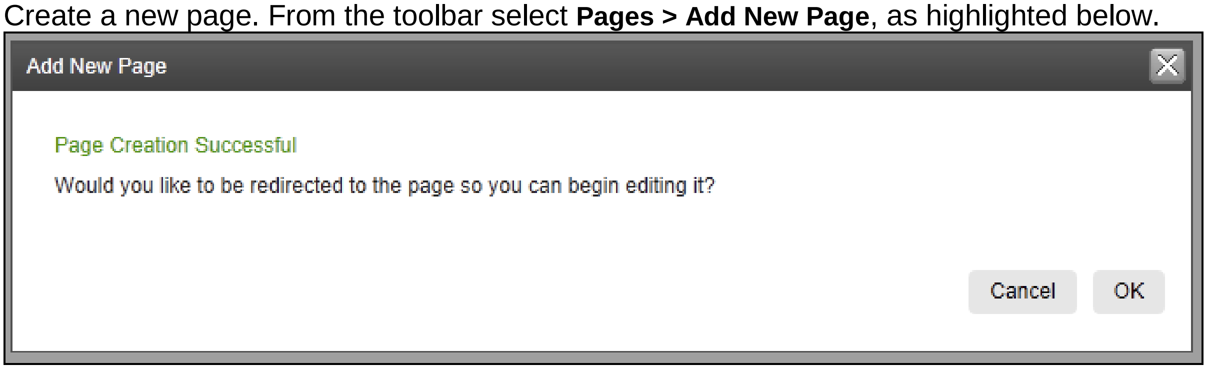
Note: Even though this web module has no user interface, it must still be added to a page like any other web module.

Note: Before you can use this web module, you must first install and configure the Product Detail web module.

Setting up Product Indexer

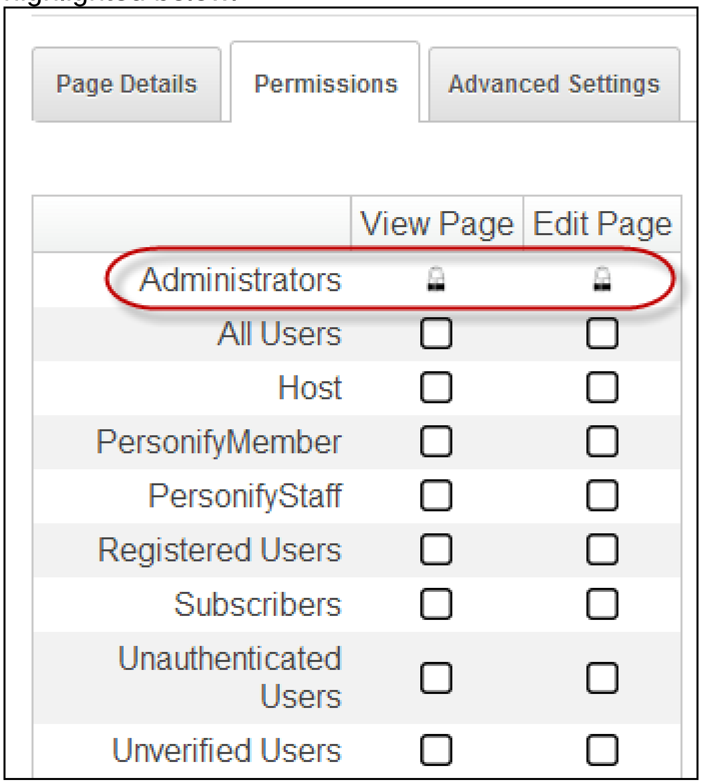
To set up Product Indexer:

1) Install the Product Indexer web module as shown at the beginning of the chapter.
2) Create a new page. From the toolbar select **Pages > Add New Page**, as highlighted below.

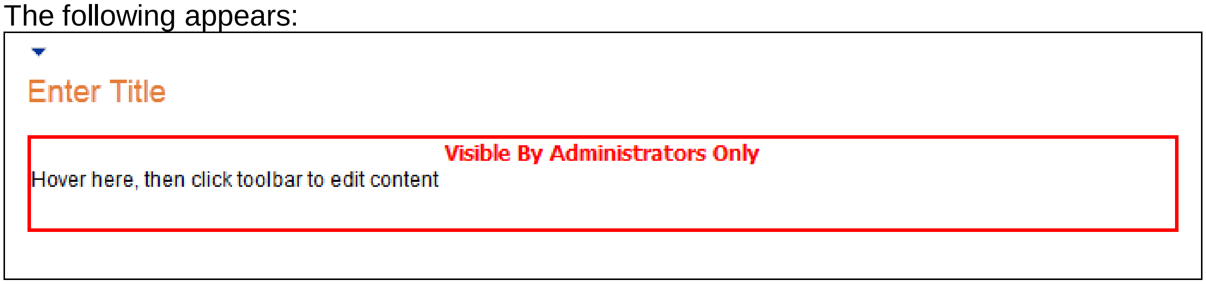


3) Fill in the page details. See Configuring Pages, Modules and Skins for more information.

4) In the Permissions tab, make sure that only the Administrator can view the page, as highlighted below.



5) Click **Update.**
The following appears:



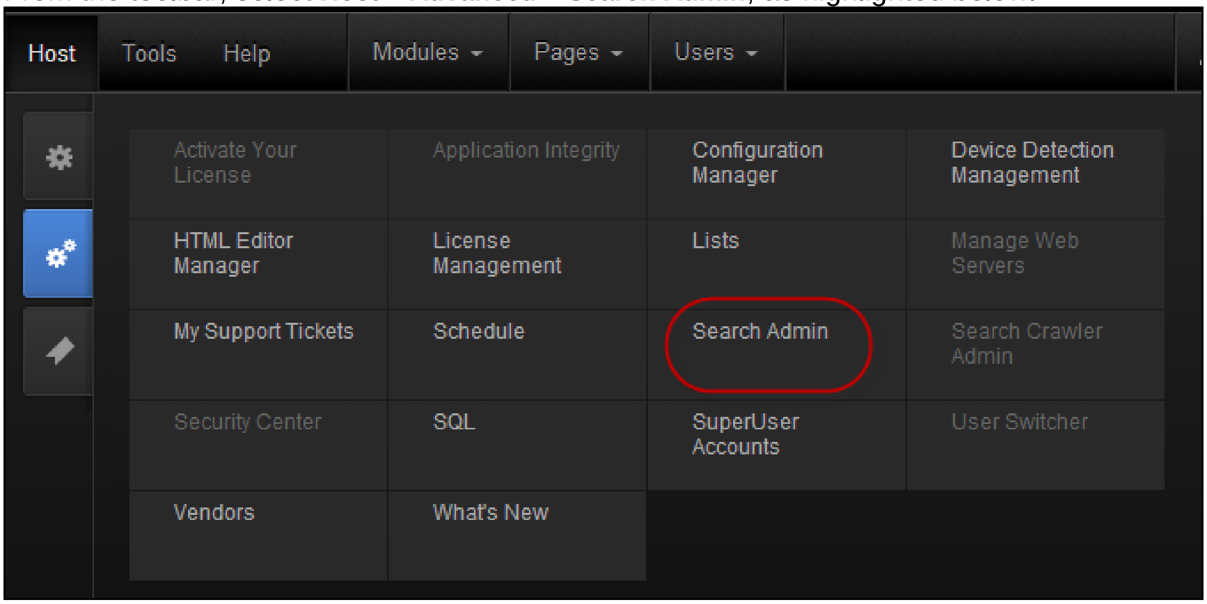
Configuring the Product Indexer

The following steps show you how to complete the configuration process of the Product Indexer web module.

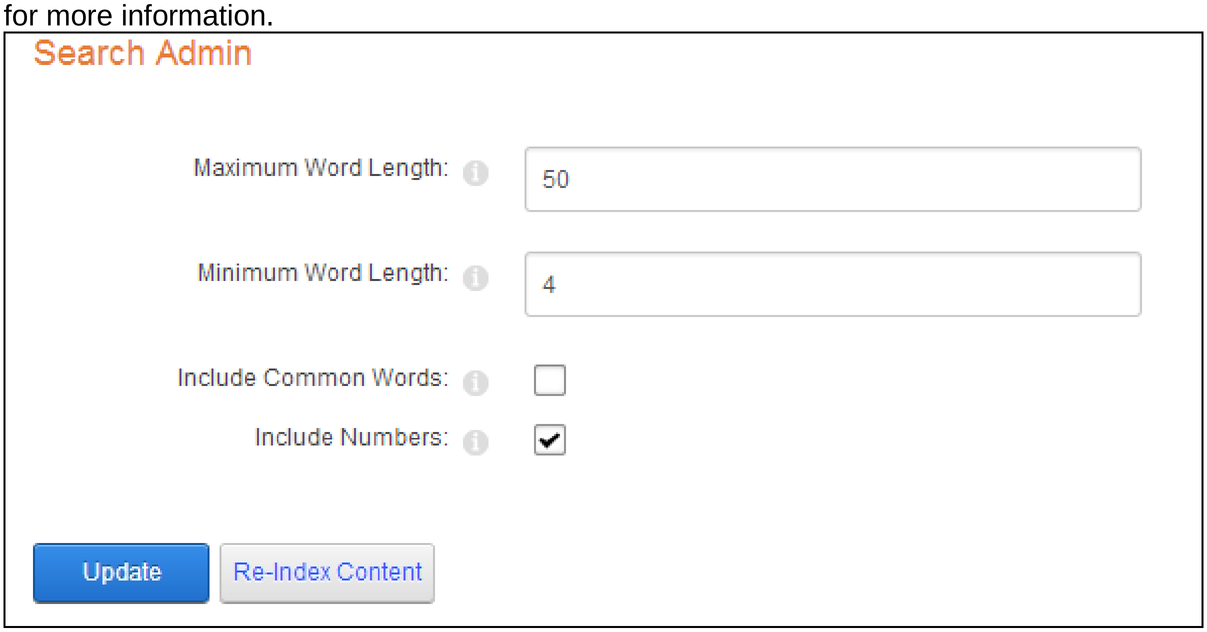
To configure the Product Indexer web module:

1) Log into your site as Host.

2) From the toolbar, select **Host > Advanced > Search Admin**, as highlighted below.

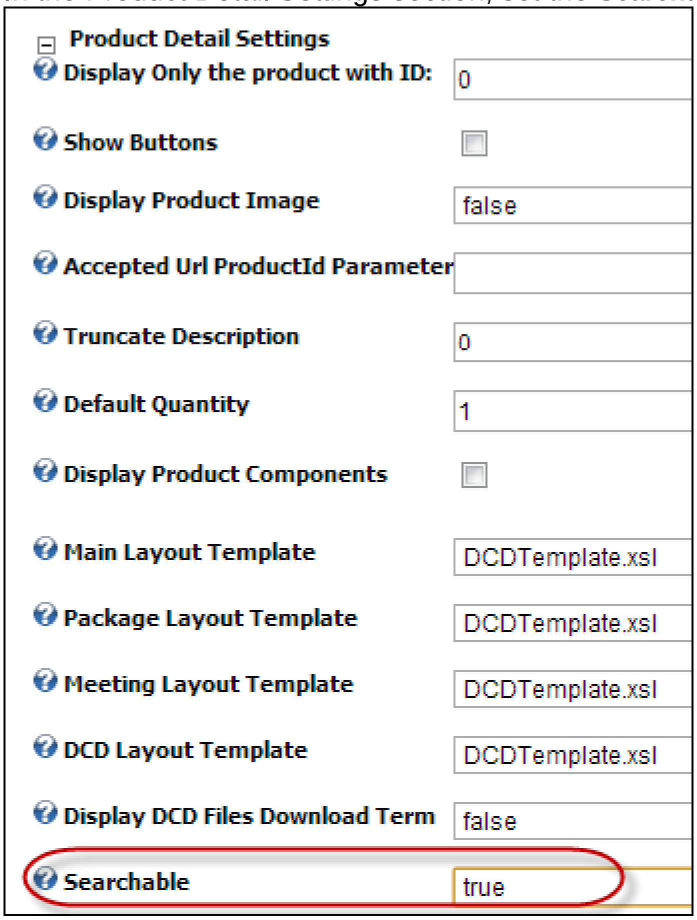


The Search Admin page displays, as shown below. See Configuring Search Admin Settings for more information.



3) Set the **Maximum Word Length** to 255.
4) Set the **Minimum Work Length** to 3.
5) Check the **Include Common Words** checkbox.
6) Check the **Include Numbers** checkbox.
7) Click **Re-Index Content** button.
8) Click **Update**.
9) Return to the new page you created and add a **Product Detail** web module to it. See Configuring the Product Detail Web Module for more information.
10) From the web module menu, click **Edit**.

11) In the Product Detail Settings section, set the **Searchable** field to **True**, as shown below.



Note: The Product Detail web module will not work with Product Indexer if this field is set to False.

12) Click **Update**.

Configuring the Product Listing Web Module

The Product Listing web module enables the display of your organization's product catalog and is the centerpiece of your store's navigational user experience.

This web module is customizable and allows you to expose more functionality than a simple product listing. Your organization has the ability to create:

- Featured Products Catalogs
- Promotional Products Catalogs

- Random Products Displays
- Specific Products Displays
- Navigational Links Between the Product Directory and the Product Detail web modules
- Product Listings for any combination of Product Types (Subsystem)

It also enables the webmaster to specify what product type (by subsystem) to display. This feature, coupled with the "template" model, allows for a custom user interface display for each different product type.

The Product Listing web module also displays product availability. If an item is out of stock, the next expected receipt date is provided, if available. In addition to displaying the list and member price of an item, the web module also displays the price specific to the user so that there is no confusion. If you are registering for a meeting, you can sort the product listing content by class, begin date, and location.

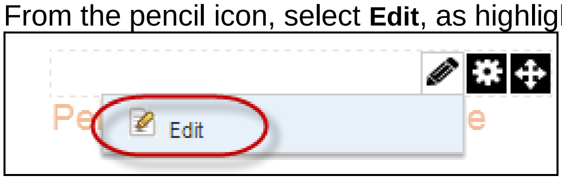
Once you added the web module to the desired page, you must configure it from the web module's menu. This only needs to be done the first time that you configure the web module and is done using the wizard-like menu.

To configure the Product Listing web module:

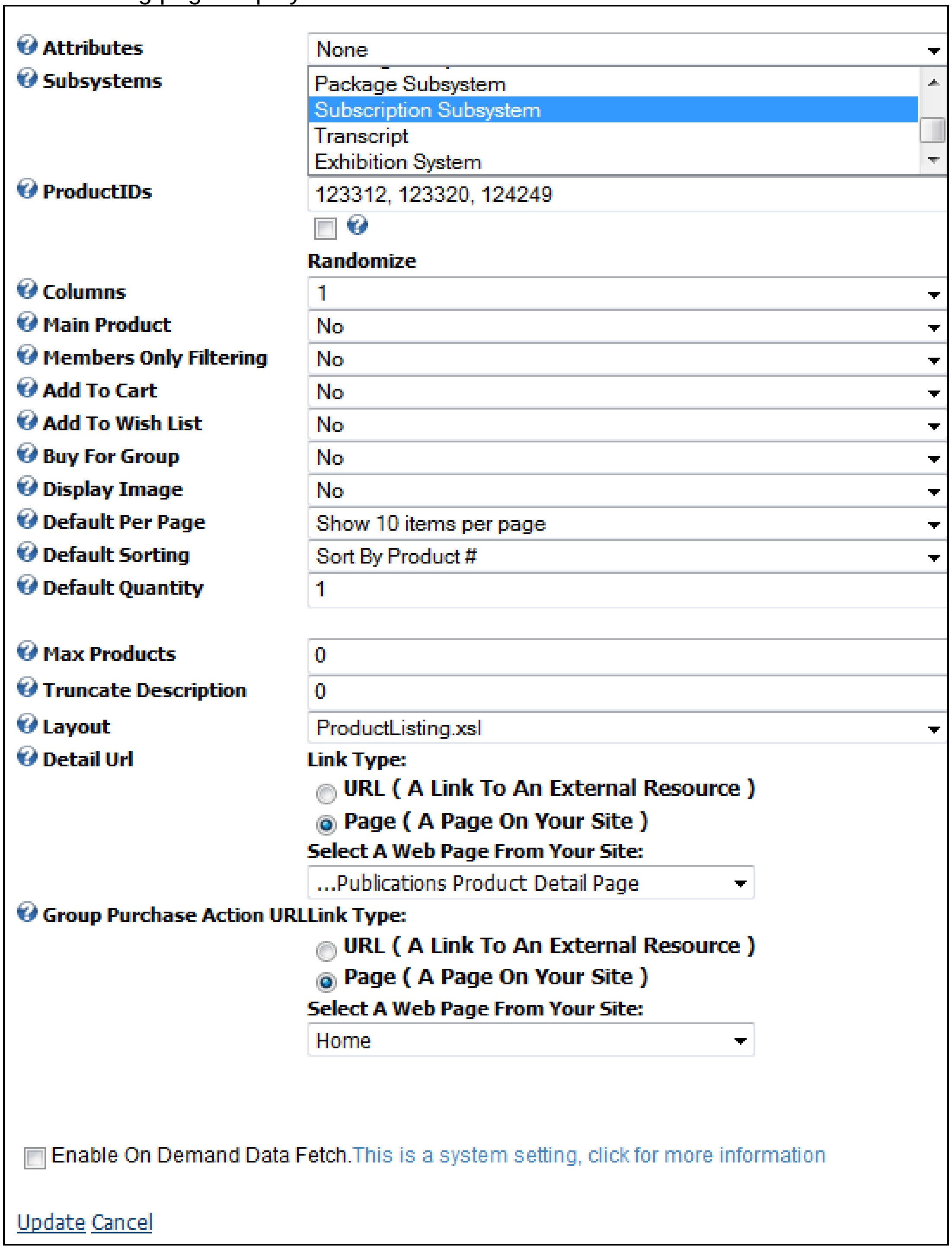
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Product Listing web module.

3) Add the **Personify – Product Listing** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:


Attributes: None
Subsystems: Package Subsystem / Subscription Subsystem / Transcript / Exhibition System
ProductIDs: 123312, 123320, 124249
Randomize
Columns: 1
Main Product: No
Members Only Filtering: No
Add To Cart: No
Add To Wish List: No
Buy For Group: No
Display Image: No
Default Per Page: Show 10 items per page
Default Sorting: Sort By Product #
Default Quantity: 1
Max Products: 0
Truncate Description: 0
Layout: ProductListing.xsl
Detail Url: Link Type:
URL (A Link To An External Resource)
Page (A Page On Your Site)
Select A Web Page From Your Site:
...Publications Product Detail Page
Group Purchase Action URL Link Type:
URL (A Link To An External Resource)
Page (A Page On Your Site)
Select A Web Page From Your Site:
Home
Enable On Demand Data Fetch. This is a system setting, click for more information
Update Cancel

5) Configure the appropriate module settings as described below:

a) **Attributes** - Drop-down. The Attributes option allows you to set a product as either Featured, Promotional, or Featured or Promotional. If you set a product as Featured, only Featured products are displayed in the page with the web module. Similarly, if you set a product as Promotional, only Promotional products are displayed, etc.
b) **Subsystems** - Up/Down Control. All products must be assigned a Subsystem. For example, a Meeting product would likely be assigned the Meeting Subsystem, etc.
c) **Product IDs** - Text box. Allows you to specify any number of specific products by providing a list of Product IDs separated by a comma (",") or a semicolon (";"). For example, entering “3144,555,3768,9765,7616” would result in the display of 5 products. This option does not determine if a ProductID is valid or active. If you input an invalid or inactive ProductID, it does not appear.
d) **Columns** - Drop-down. This setting allows you to define basic layout schemes without having to make HTML mark-up code changes. By default, the web module is set to a single column. You may select up to five columns.
e) **Main Product** - Drop-down. Selecting this option displays the first product in the record set in a more prominent banner spot at the top of the listing. The listing that follows the main product will also inherit the “Columns” setting and displays the products in as many columns were selected. The layout and behavior of the layout settings can also be modified in the XSL templates. XSL templates are detailed later in this section.
f) **Members Only Filtering** - Drop-down. This setting allows you to display products that are marked for members only to users that meet the criteria of membership. Non-Members will not be able to purchase a Member Only product. If you leave this option unchecked, it will unnecessarily take non-members through the online purchasing procedure, only to find they cannot complete the transaction because they do not meet the membership requirements.
g) **Add To Cart** - Drop-down. This setting enables you to define the work-flow and user experience by enabling or disabling the option to allow a user to purchase a product directly from a Product Listing. Disabling this setting will hide the “Add to Cart” button on the listing, which then forces the user through the work-flow defined by the “Detail URL” setting. In most cases the “Detail URL” is the last page a user is driven to see the full details of the product. The control will only completely disappear from the listing if both the “Add to Cart” and “Add to Wishlist” settings are disabled.
h) **Add To Wish List** - Drop-down. This setting enables you to define the work-flow and user experience by enabling or disabling the option to allow a user to add a product to his/her wishlist from a product listing. Disabling this setting will hide the “Add to Wishlist” button on the listing. The only other location from which a user is able to add an item to the wishlist is the Product Detail page. The control will only completely disappear from the listing if both the “Add to Cart” and “Add to Wishlist” settings are disabled.
i) **Buy For Group** - Drop-down. This setting allows you to determine whether or not the customer can buy the product for a group.
j) **Display Image** - Drop-down. This setting allows you to either hide or show the product images on the listing.
k) **Default Per Page** - Drop-down. This setting allows you to choose the maximum number of result items shown per page. By default, the listing shows up to 10 result items per page. Using the drop-down, you can select between 10 and 30 results per page. The options drop-down is built from a name-value pair string located in the web module's localization file called “ProductListingEdit.ascx.rex”.

The default string is as follows:
10|Show 10 items per page|20|Show 20 items per page|30|Show 30 items per page
If you wished to add options for 40 and 50 items per page the string would look as follows:
10|Show 10 items per page|20|Show 20 items per page|30|Show 30 items per page|40|Show 40 items per page|50|Show 50 items per page.

Note: To edit this option, in the DotNetNuke Language Editor perform the following:

1. Log in as the website Administrator.
2. Locate the Languages Menu Items located in the Admin Tab.
3. Select “Language Editor.”
4. From the Tree control on the left-hand side, locate and click on the following entry:

LocalResources\DesktopModules\Personify - ProductListing\App_LocalResources\ProductListingEdit.ascx
You can now edit the resource strings for this web module.

---

l) **Default Sorting** - Drop-down. This setting allows you to set the default method in which the system sorts the products. For example, by product number, title, etc.
m) **Default Quantity** - Text box. This setting allows you to choose the default quantity of a product when it is selected for purchase. By default, it is set to one.
n) **Max Products** - Text box. The “Max Products” setting allows you to restrict the number of products to be displayed on the page. This is useful when wanting to display a set number of “Featured” and or “Promotional” products, or to promote a set number of specific products. This setting restricts the result set displayed to this number, even though the filter specified in your settings may generate a result set larger than the specified maximum number of products.
o) **Truncate Description** - Text box. This setting allows you to define a maximum character length of the product description. By default, the entire (long) description is shown.
p) **Layout** - Drop-down. The Product Listing web module allows you to modify the layout of the rendered listing without the need of any programming knowledge other than basic knowledge of HTML, XSL (Extensible Style Sheet Language) and XSLT (Extensible Style Sheet Language Transformations). The layouts are stored as XSL files which contain the transformation logic of the data.

   The “Layout” setting enables the Webmaster to select specific XSL templates and render the data in different layout and design formats.

   The Product Listing renders the webpage by transforming the incoming data according to the style specified in the XSL file. This is done by using XML transformation.

   To add additional templates, copy them to this folder (Website Root\DesktopModules\Personify - ProductListing\Templates). They will automatically appear in the Layout drop-down control. Modifying, adding, or removing the layout templates does not required code compilation.

q) **Detail URL** - Radio button and drop-down. This setting allows you to determine where the customer is directed upon clicking the Detail link.
r) **Group Purchase Action URL** - Drop-down. This setting allows you to determine where the customer is directed upon making a group purchase.

6) Click **Update**.

About XSL

XSL is a language for expressing style sheets. An XSL style sheet is a file that describes how to display an XML document of a given type. XSL shares the functionality and is compatible with CSS2 (although it uses a different syntax). It also adds:

- A transformation language for XML documents: XSLT. Originally intended to perform complex styling operations, like the generation of tables of contents and indexes, it is now used as a general purpose XML processing language. XSLT is thus used for purposes other than XSL, such as generating HTML webpages from XML data.
- Advanced styling features, expressed by an XML document type that defines a set of elements called Formatting Objects, and attributes (in part borrowed from CSS2 properties and adding more complex ones).

For more information on XSLT visit the W3C website.

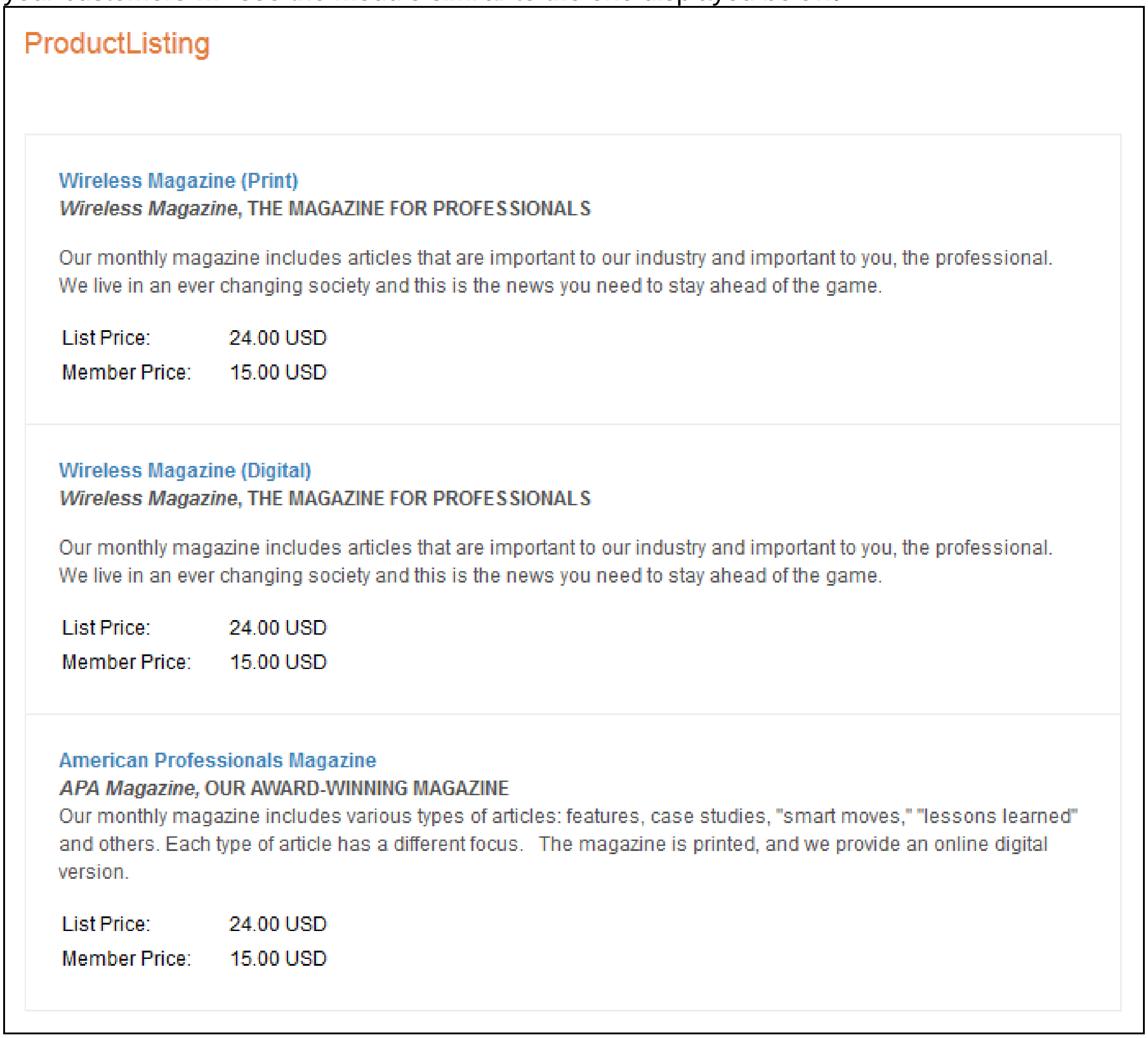
About XSLT

XSLT (Extensible Style Sheet Language Transformations) is a standard subset language of XML designed to allow one XML data structure to be transformed into other document structures. For example, XML files can be transformed into HTML, into WML for display on Web-enabled mobile phones etc.

For more information on XSLT visit the W3C website.

Customer Impact

Depending on the parameters you selected when setting up the Product Listing web module, your customers will see the module similar to the one displayed below.



Configuring the Product Directory Web Module

The Product Directory web module lists for a product class, categories, or subcategories in e-Business. This web module is also used for listing product classes for a given subsystem. You can even use this web module to set up an icon image and sort order for a group of products.

Once you have set up the Product Directory web module for use within your website, you need to configure it.

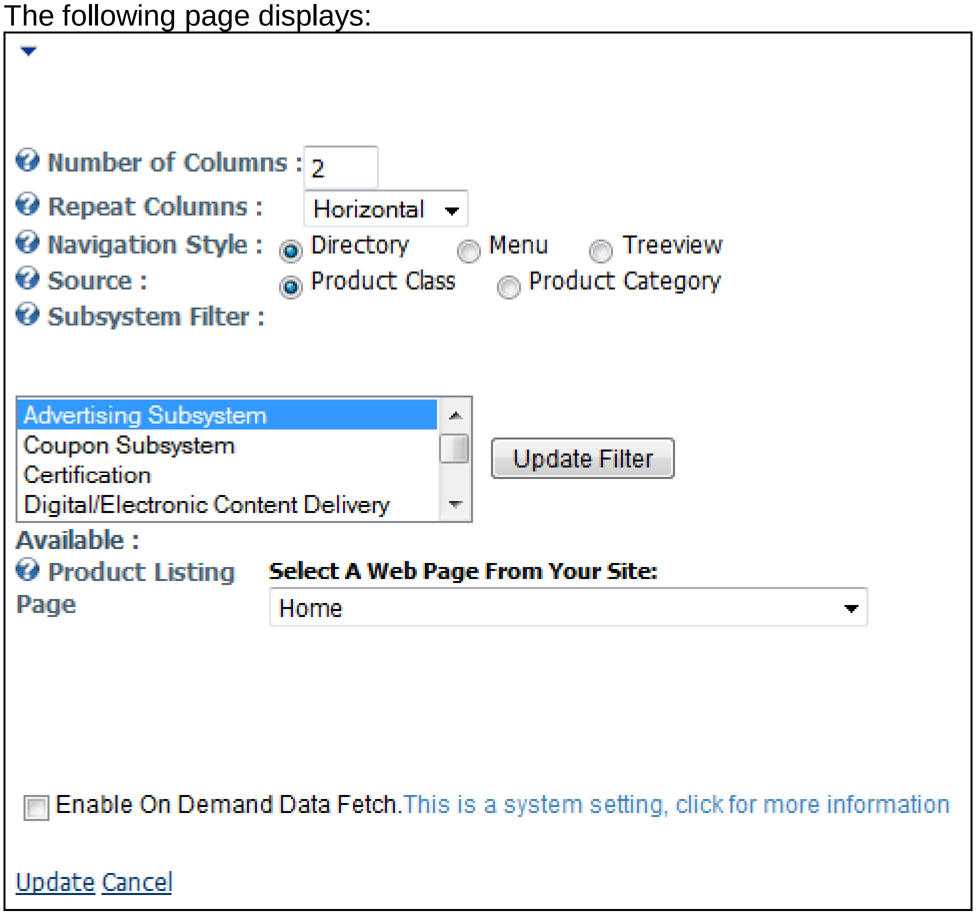
To configure the Product Directory web module:

1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Product Directory web module.

3) Add the **Personify – Product Listing** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.

The following page displays:



5) Configure the appropriate module settings as described below:

a) **Number of Columns** - Text box. The number entered here determines the number of column your data displays in when using the Product Directory module.
b) **Repeat Columns** - Drop-down. This setting determines if columns with identical information are displayed horizontally or vertically.
c) **Navigation Style** - Radio button. This setting determines if your data is displayed as a directory, menu, or a tree view.
d) **Source** - Radio button. This setting determines if you wish to display product classes or product categories when using the Product Directory.
e) **Subsystem Filter** - Drop-down and Button. This filter lets you select which subsystem or category to display. If you select Product Class for the Source setting, you can select one or more subsystems. If you select Product Category, you can select one or more product categories.
f) **Available** - This setting displays a table with an item code, item description (which you can modify), a checkbox that allows you to include a particular item code for display, select sort order, and the option of adding a URL for an icon image.
g) **Product Details Page** - Drop-down. This setting determines the webpage to which the customer is directed upon clicking the Product Details link.

6) Click **Update**.

Customer Impact

Depending on the selected navigation style, the links will display differently. The following image is an example of how your customers will see the Product Directory Web module with the Menu navigation style.

Configuring the Change Preferred Currency Web Module

The 7.3.0 SP2 e-Business package (and above) includes a module (Personify – ChangePreferredCurrency) which, when dropped on a product page, provides your users with a link that directs them to your Name & Contact Preferences page. By directing them back to this page, users can change their preferred currency, save the change, and then be directed right back to the product page they were viewing without losing any products already selected for purchase.

In order for the Change Preferred Currency web module to work within the e-Business site, the back office must be configured to accept multiple currencies.

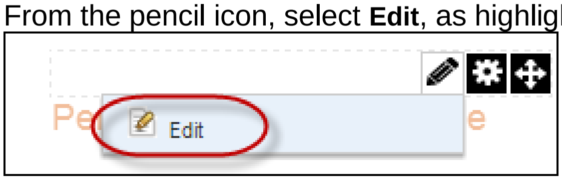
Note: For more information on setting up multi-currency on a single portal, please see Setting the e-Business Default Currency for a Single Currency.

To configure the Change Preferred Currency Web Module:

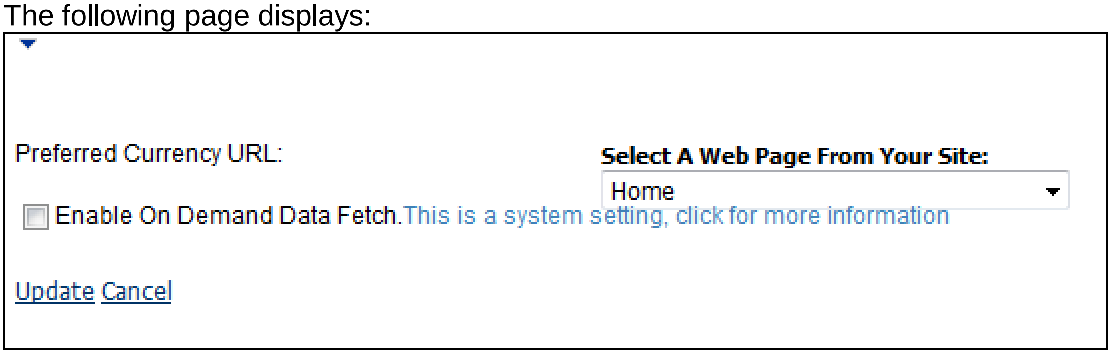
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Change Preferred Currency web module.

3) Add the **Personify – Product Listing** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:

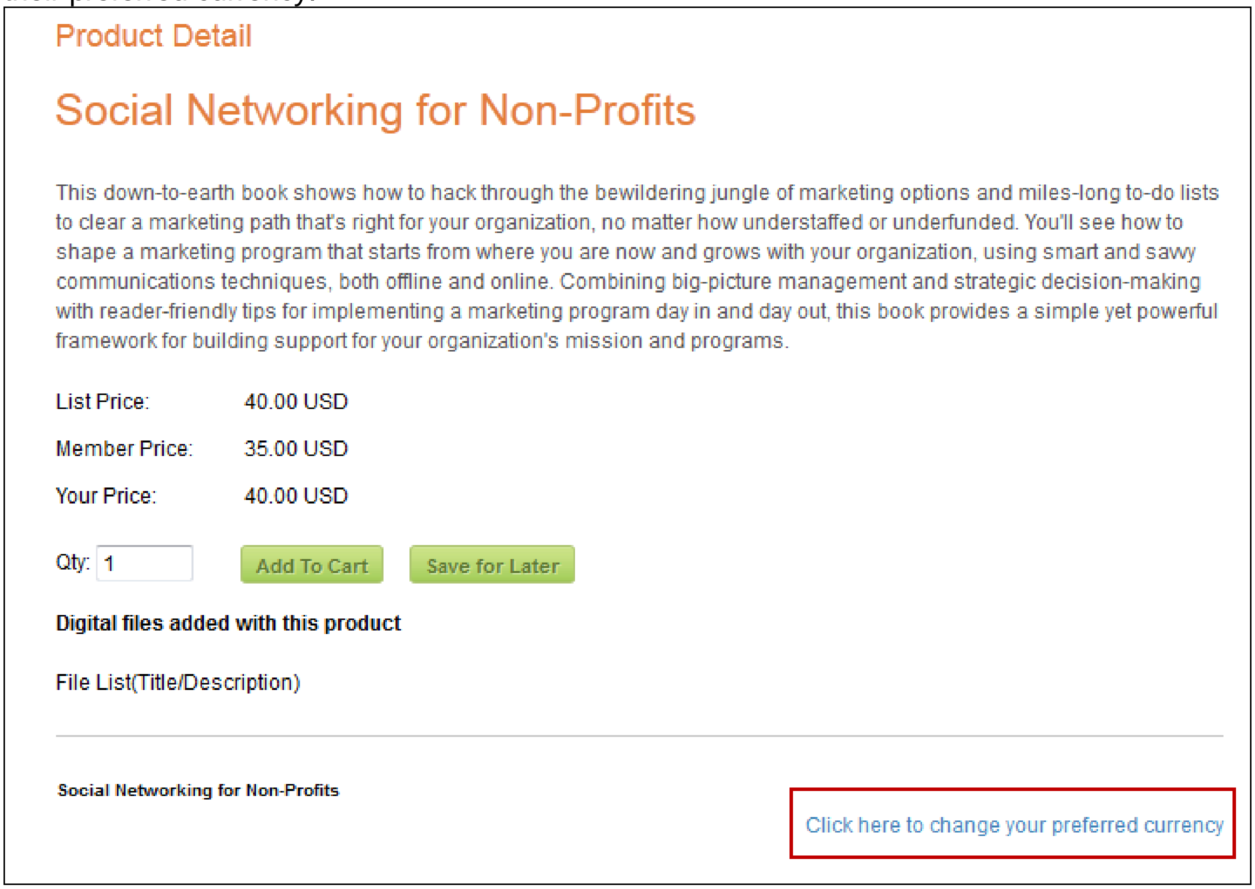


5) Configure the appropriate module settings as described below:

   a) **Preferred Currency URL** – Drop-down. Select Name & Contact Preferences from the drop-down for the system to redirect users.
6) Click **Update**.

Customer Impact

When users are logged into your organization’s e-Business website, they will see the Change Preferred Currency link on all pages you added it to. By clicking the link, users are directed to your page containing the Personify – Customer Preferences module where they can change their preferred currency.



Configuring the Order Create Web Module

The Order Create web module is used in conjunction with the one-click or checkout processes in e-Business. This module manages issues that can be raised by the system concerning ordering a product that may require the user to answer a question. For example, the product you are ordering will go on back order; do you wish to proceed?

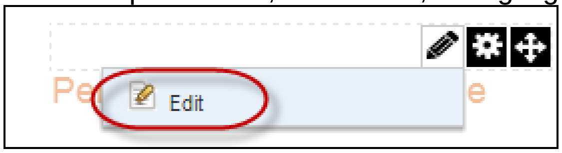
Note: This web module must appear on the same page with the Product Detail and Order Payment web modules in order to use the one-click checkout feature.

To configure the Order Create web module:

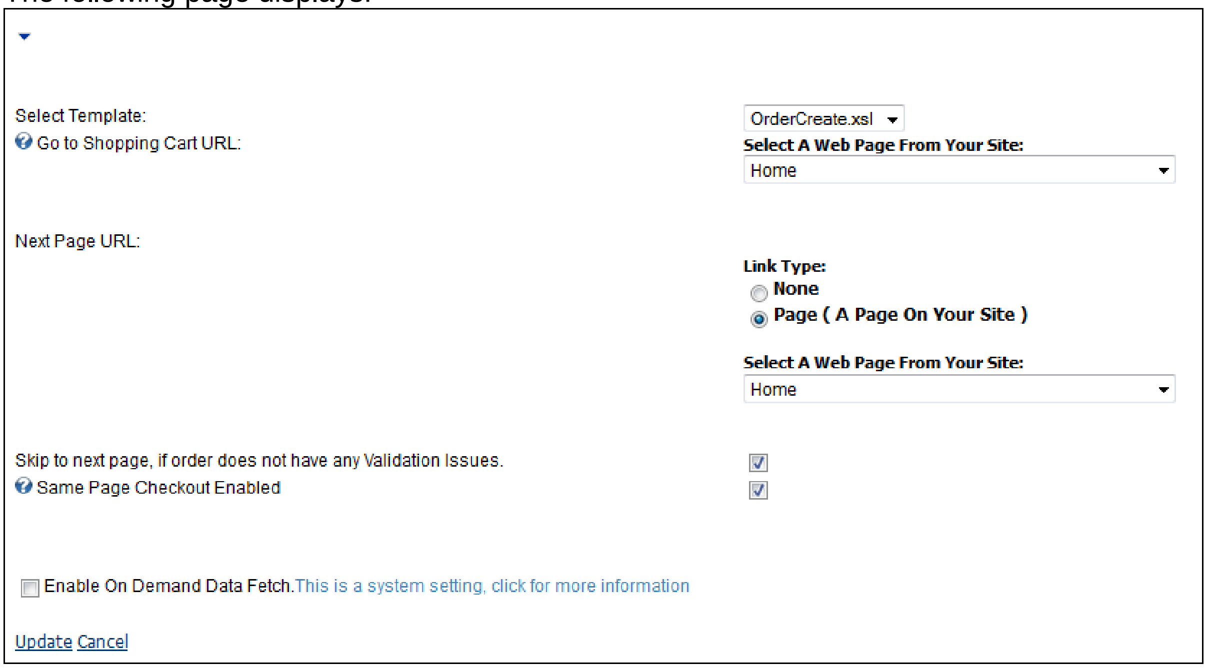
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Order Create web module.

3) Add the **Personify – Order Create** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:

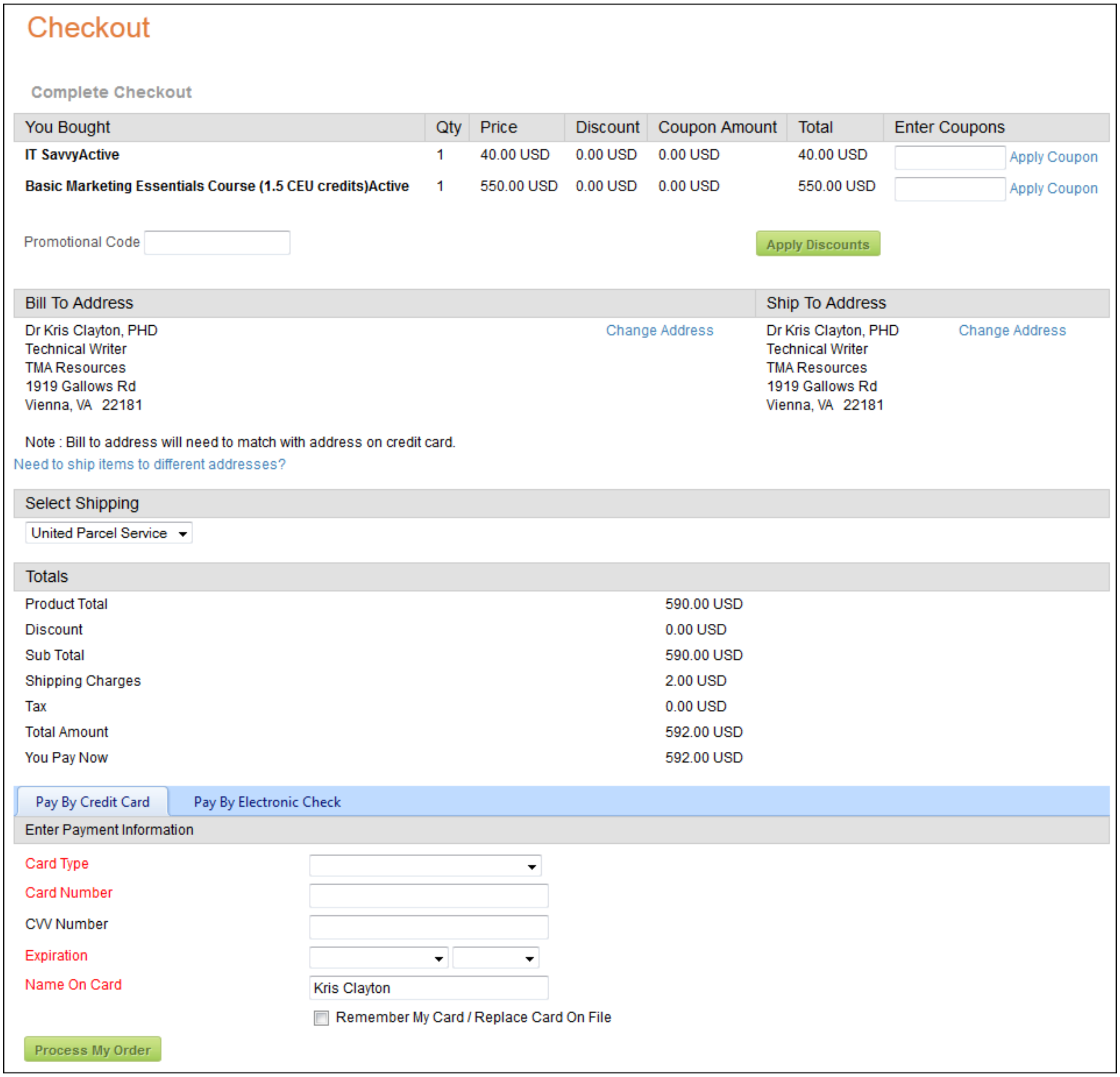


5) Configure the appropriate module settings as described below:

   a) **Select Template** - Drop-down. This setting allows you to select the template in which the module displays.
   b) **Go to Shopping Cart URL** - Drop-down. This option allows you to select which page to display when the shopping cart link is clicked. You should use the Shopping Cart webpage, if available. If no shopping cart is available, you must remove the control from the template.
   c) **Next Page URL** - Radio button. This setting allows you to select the page to display on the next page. If you are using the one-click checkout process, this should be set to None
   d) **Skip to next page, if order does not have any Validation Issues.** - Checkbox. This option is for the Shopping Cart workflow, it should not be selected.
   e) **Sample Page Checkout Enabled** - Checkbox. This option lets you enable the one-click checkout process for use in your webpage. If this option is selected, you must also have the Order Payment and Product Detail web modules on the same page as the Order Create web module. If selected, the Review Order and Make Payment buttons are visible.
6) Click **Update**.

Customer Impact

After setting up the Order Create web module, your customers will see the module as displayed below.



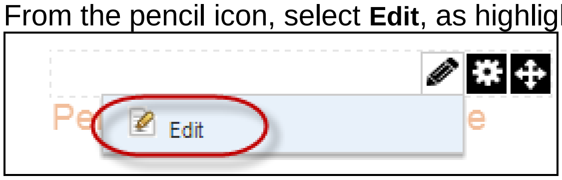
Configuring the Order Summary Web Module

The Order Summary web module is used to recapitulate an order once it is placed using the shopping cart. Once a customer places an order and validates it, e-Business displays a summary of the order. This includes information such as the product, shipping method, shipping address, and payment details.

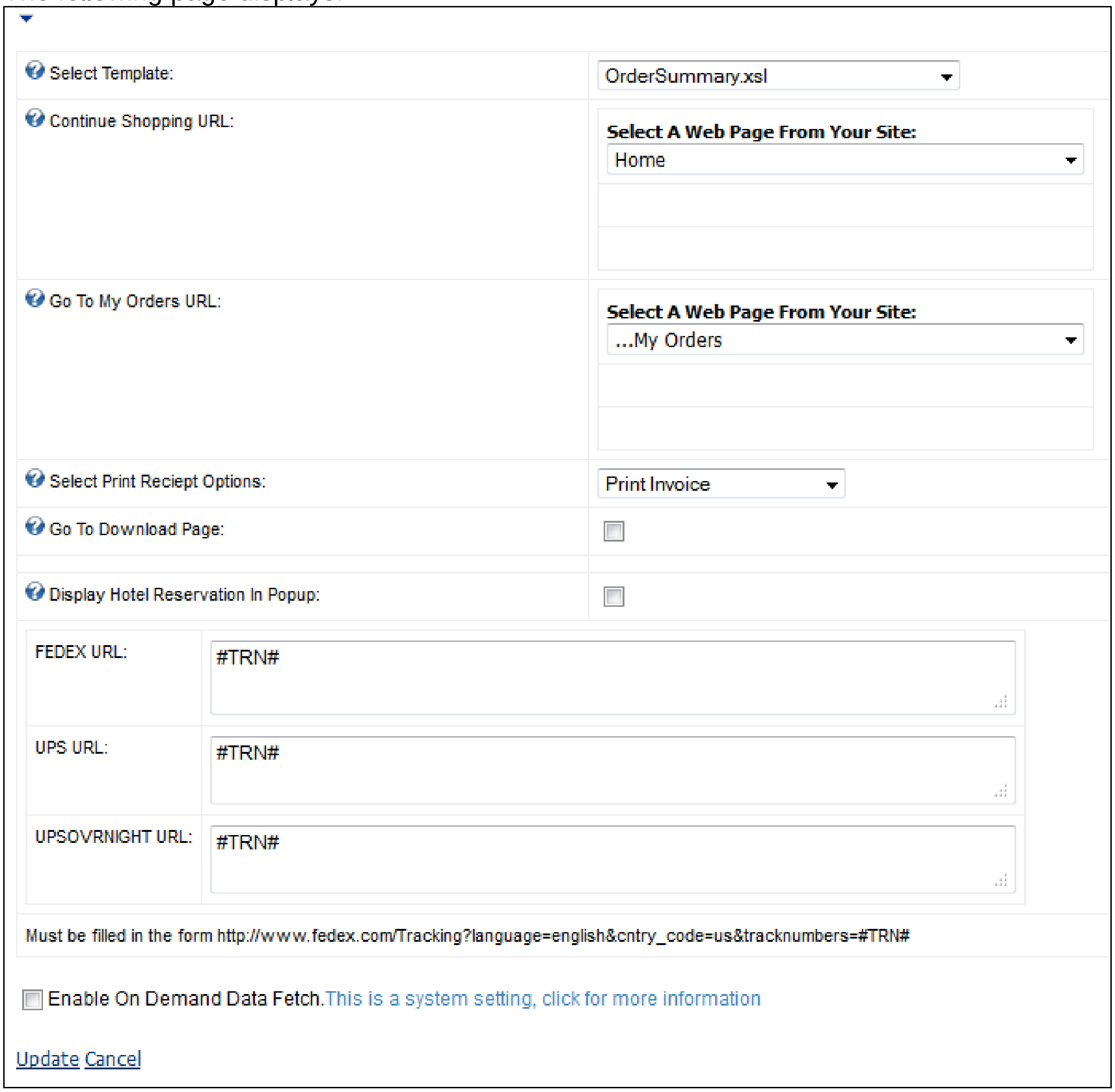
This web module requires the presence of several web modules, including order payment, customer address, and shopping cart.

To configure the Order Summary web module:

1) Log into your site as Host.
2) Navigate to the appropriate page on your site where you want to add the Order Summary web module.
3) Add the **Personify – Order Summary** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

a) **Select Template** - Drop-down. This setting allows you to select the template in which the module displays.
b) **Continue Shopping URL** - Drop-down. This setting allows you to select the webpage to which the customer is directed to upon clicking the Continue Shopping button.
c) **Go To My Orders URL** - Drop-down. This setting allows you to select the webpage to which the customer is directed to if they want to see their past orders.
d) **Go To Download Page** - Checkbox. When checked, the customer is taken to the module where they can download purchased DCD content.

e) **DCD Files Download URL** - Drop-down. When the Got To Download Page checkbox is checked, you must select the page to which your customer is directed upon clicking on a purchased DCD product.

f) **UPS URL** - Text box. Allows you to have package tracking for your customer when the order is sent via UPS. See below.

g) **FEDEX URL** - Text box. Allows you to have package tracking for your customer when the order is sent via FedEx. See below.

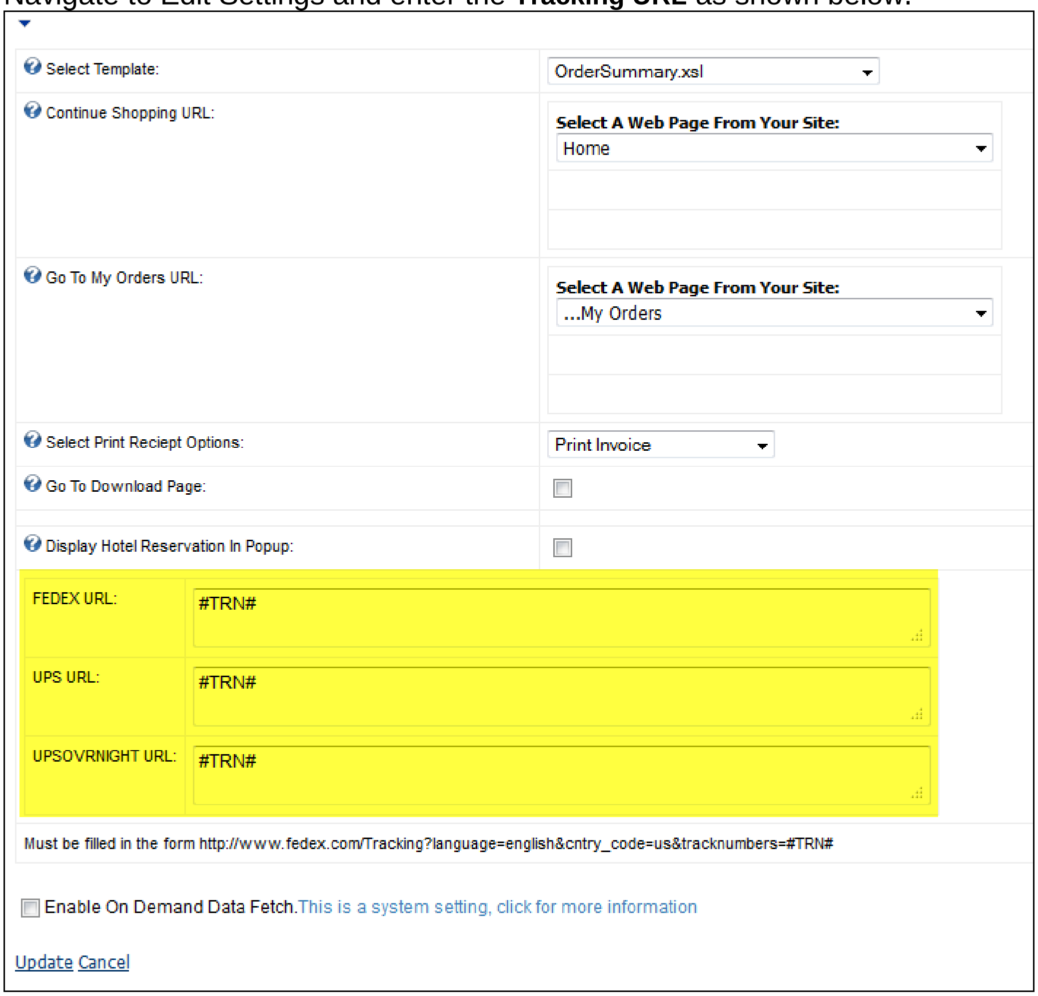
6) Click **Update**.

Note: Before you begin, you will need to enable Ship Via Codes on the Order Summary page.

Configuring the UPS/FEDEX/UPSOVERNIGHT URLs

To configure the UPS/FEDEX/UPS OVERNIGHT URLs:

1) Navigate to Edit Settings and enter the **Tracking URL** as shown below.

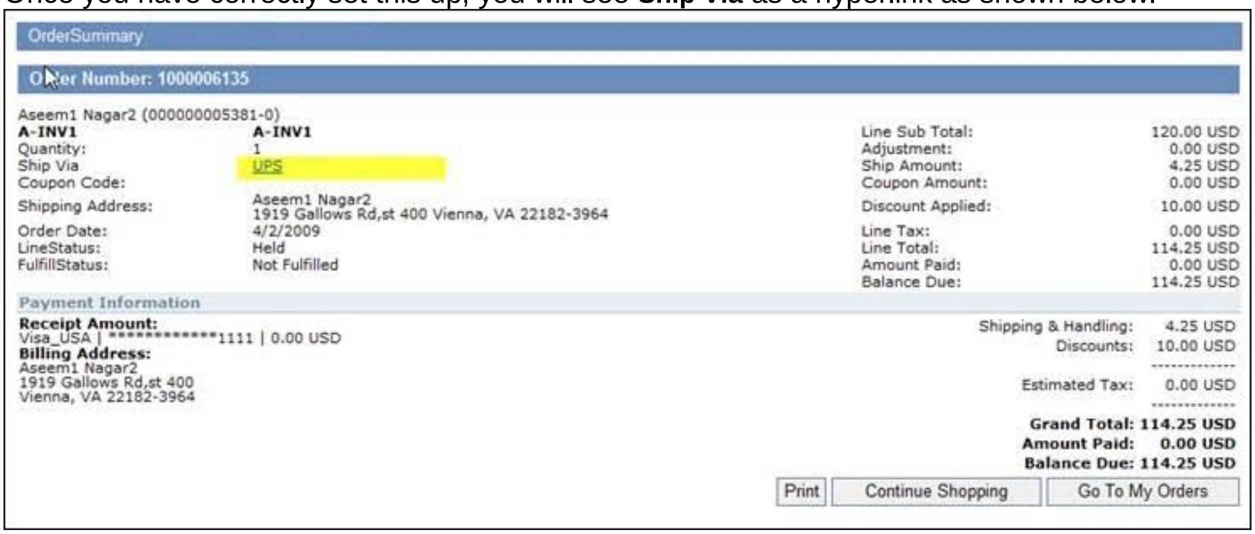


Note: You will need to get the correct URL format from the vendor you are utilizing. For instance, UPS's URL is [http://wwwapps.ups.com/WebTracking/processInputRequest?tracknum=1Z99999999999 99999](http://wwwapps.ups.com/WebTracking/processInputRequest?tracknum=1Z9999999999999999)

2) Enter the **Tracking Number**.
3) Click **Save.**

Customer Impact

Once you have correctly set this up, you will see **Ship Via** as a hyperlink as shown below.



Configuring the Order Payment Web Module

The Order Payment web module is used to prepare orders for shipment and then to accept order payments. It is also used in conjunction with the one-click checkout process.

Note: This web module must appear on the same page with the Product Detail and Order Create web modules in order to use the one-click checkout feature.

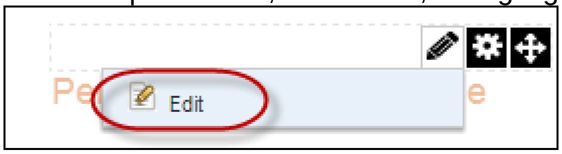
To configure the Order Payment web module:

1) Log into your site as Host.

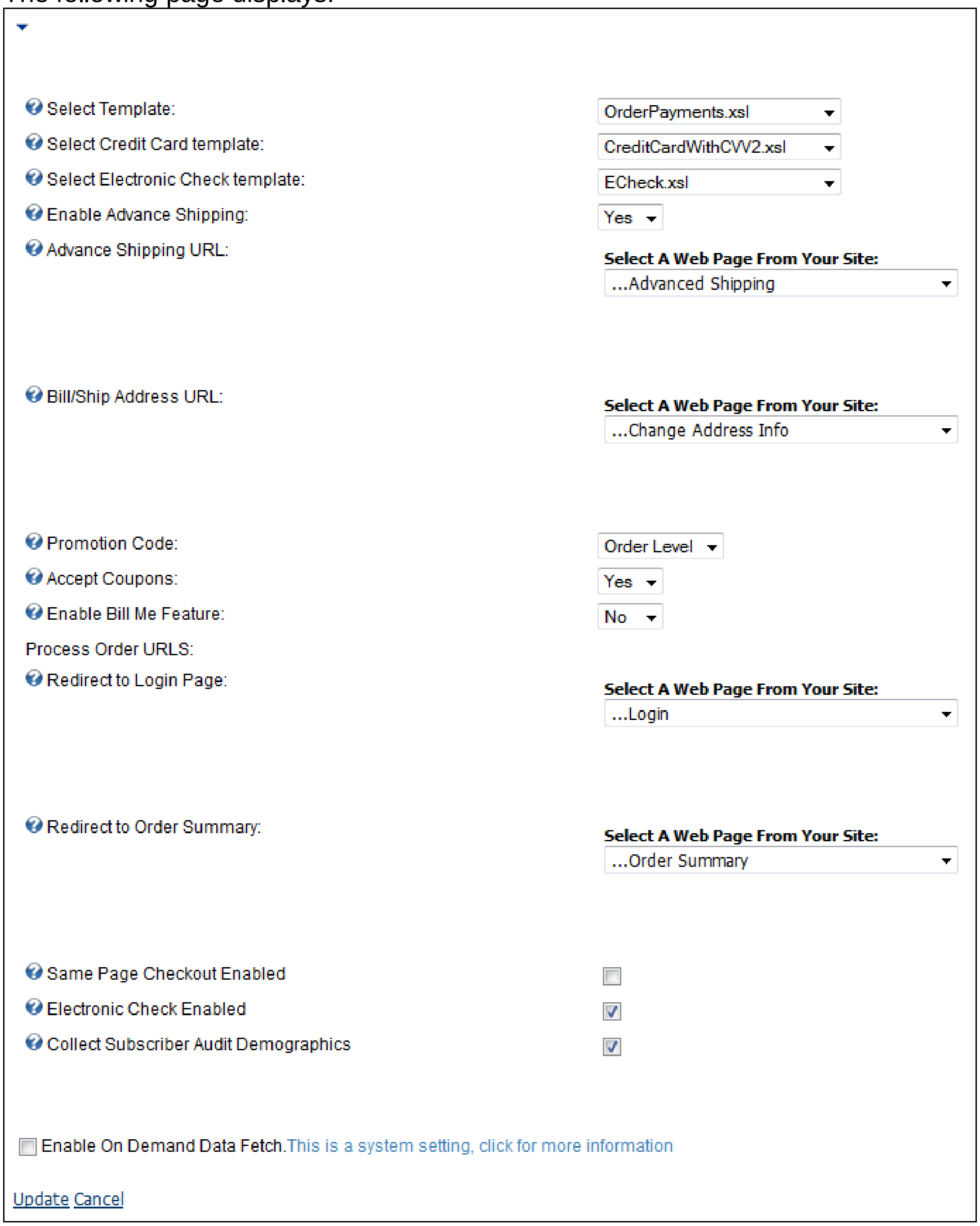
2) Navigate to the appropriate page on your site where you want to add the Order Payment web module.

3) Add the **Personify – Order Payment** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.

4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

   a) **Select Template** - Drop-down. This setting controls the display of the Product Details, Bill/Ship Address, Shipping Details, and Order Totals on the page.
   The web module contains two templates:

      i) OrderPayments.xsl – Has all controls available for order processing. The user can change the address, choose shipping details, etc. from this template.

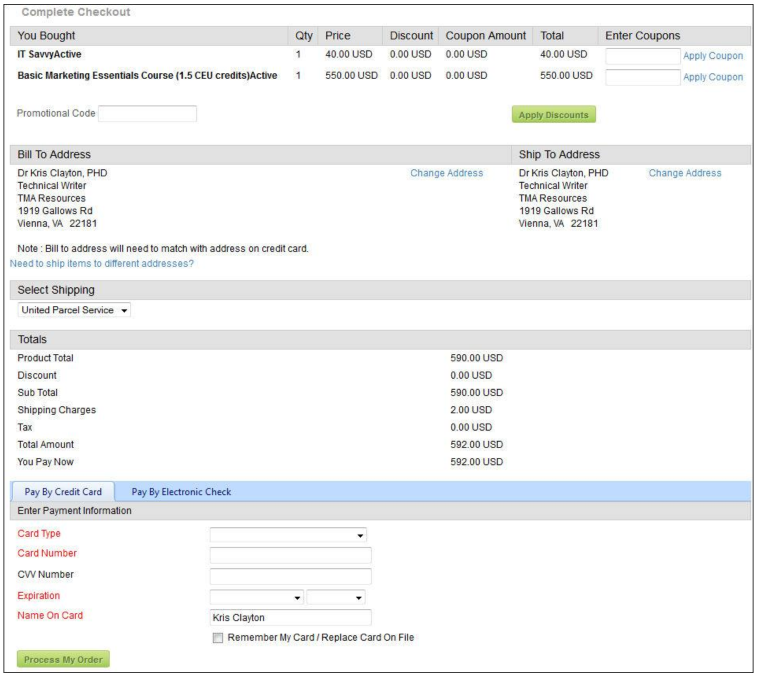
      ii) BlankOrderPayments.xsl – This template does not have these options, however, the organization can choose to add controls from the main template. The BlankOrderPayments template allows users to set up the web module for use on a one-click purchase page.
      For example, an organization may want to provide shipping options for inventory products using the one-click checkout process. By adding the necessary controls to the template (copied from the OrderPayments template), they can be made available.

   b) **Select Credit Card template** - Drop-down. This setting allows you to select the template in which the Credit Card section displays.
   c) **Select Electronic Check template** - Drop-down. This setting allows you to select the template in which the electronic check functionality displays to the user. The Electronic Check Enabled checkbox must be checked for this template to display.
   d) **Enable Advance Shipping** - Drop-down. When selected, a link to the Advance Shipping page displays.
   e) **Advance Shipping URL** - Drop-down. This setting allows you to determine the webpage to which the customer is directed to upon clicking the Advance Shipping link.
   f) **Bill/Ship Address URL** - Drop-down. This setting allows you to determine the webpage that contains the Customer Address web module.
   g) **Promotion Code** - Drop-down. This setting displays the promotion code for either each order line or the entire order depending on the setting.
   h) **Accept Coupons** - Drop-down. This setting determines whether or not coupons are accepted.
   i) **Enable Bill Me Feature** - Drop-down. This setting determines whether or not you allow customers to be billed for their order instead of requiring an immediate payment.
   j) **Redirect to Login Page** - Drop-down. This setting allows you to select the Login page where the customer is sent if they are not already logged in.
   k) **Redirect to Order Summary** - Drop-down. This setting allows you to determine the webpage to which the customer is directed to if the Process Order is successful.
   l) **Same Page Checkout Enabled** - Checkbox. When checked, the web module is set up for same page purchasing.
   m) **Electronic Check Enabled** - Checkbox. When checked, the web module is set up for electronic check payment. In the back office, the Check_Type application code must be set. The Check_Type code (e.g., Personal) must also have the “Available for Web” checkbox checked.
   n) **Collect Subscriber Audit Demographics** - Checkbox. When checked, the checkout page will display a pop-up to enter audit demographic data.

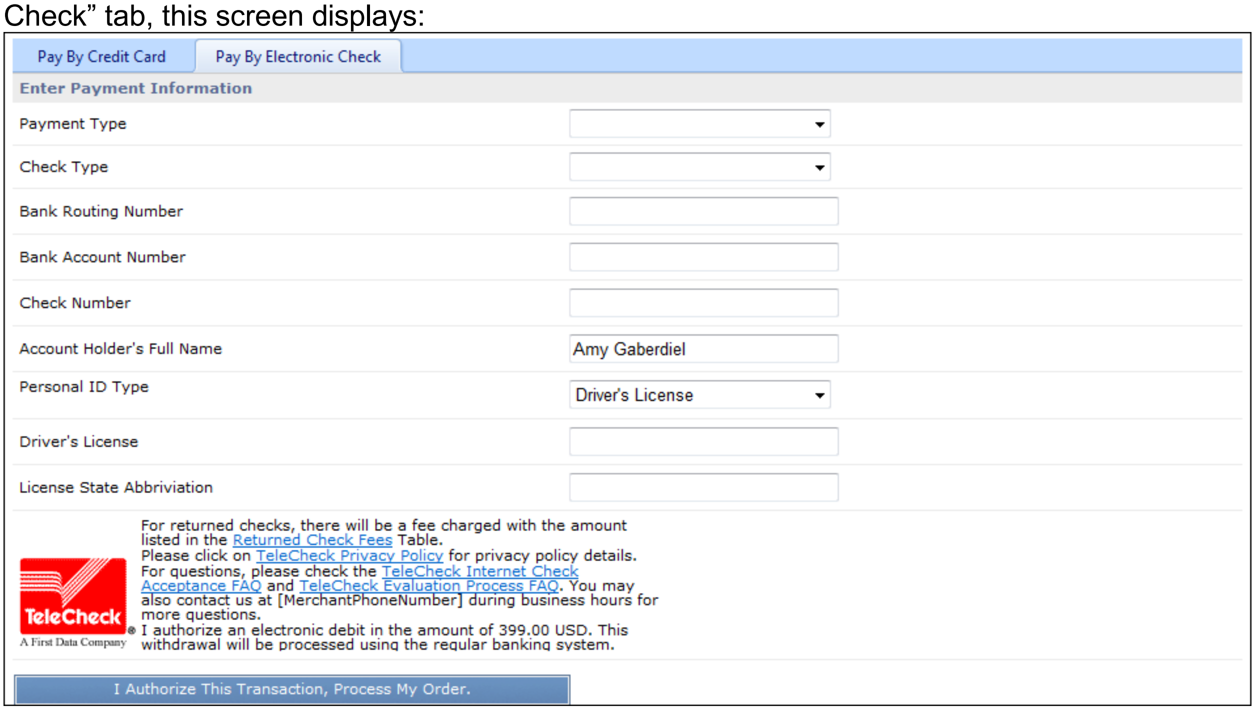
6) Click **Update**.

Customer Impact

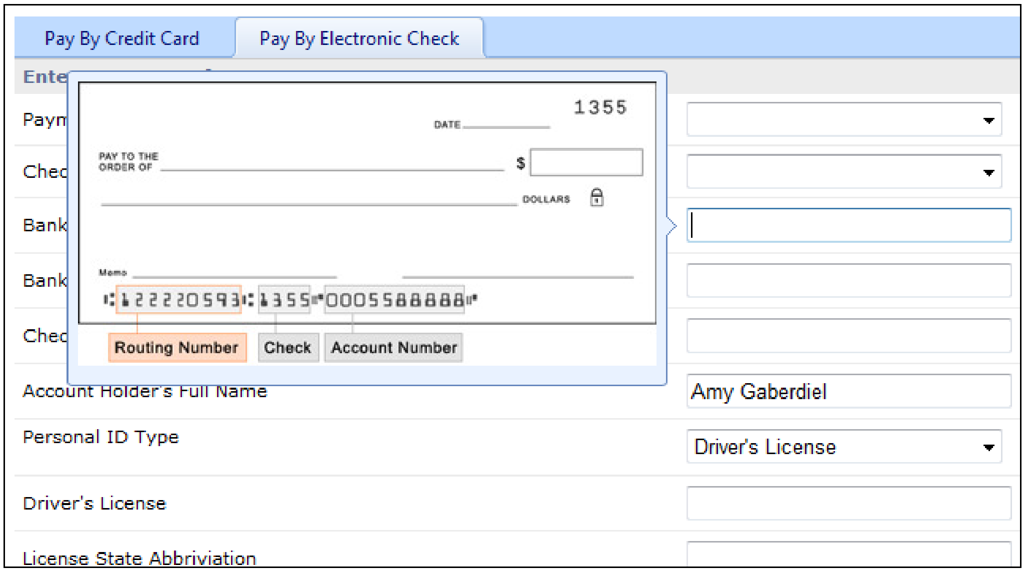
After setting up the Order Payment web module, it may appear, as below, to your customers.



In this example, the Electronic Check Enabled checkbox has been checked during setup, allowing customers to pay via electronic check. If the customer clicks the "Pay By Electronic Check" tab, this screen displays:



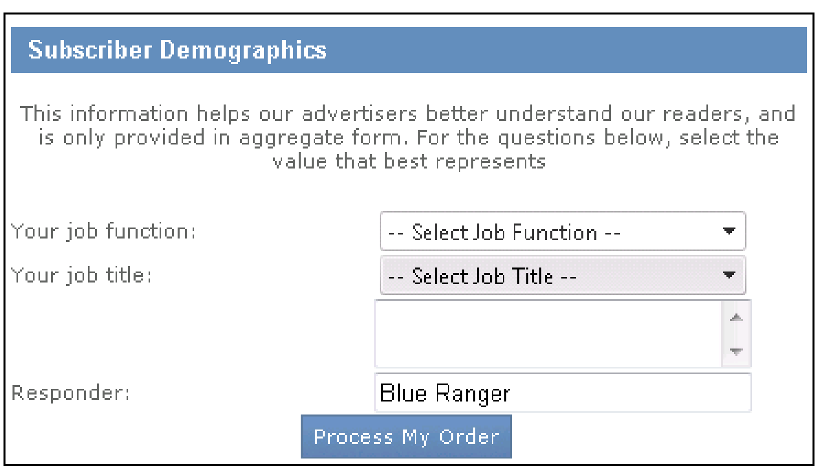
When the customer tabs-in to the Bank Routing Number and Bank Account Number fields, a sample check displays to assist the customer in finding the proper numbers they need to enter, as shown below.



Note: If an electronic check transaction is declined, it is TeleCheck, not your company or the system, that is declining the transaction.

Note: eChecks can only be used for American Dollars. If your organization is using multi-currency, ensure that you have disabled this functionality for those portals not using American Dollars as their base currency.

If the option "Collect Subscriber Audit Demographics" was selected, the pop-up below will display for entry of **Subscriber Demographic** data.



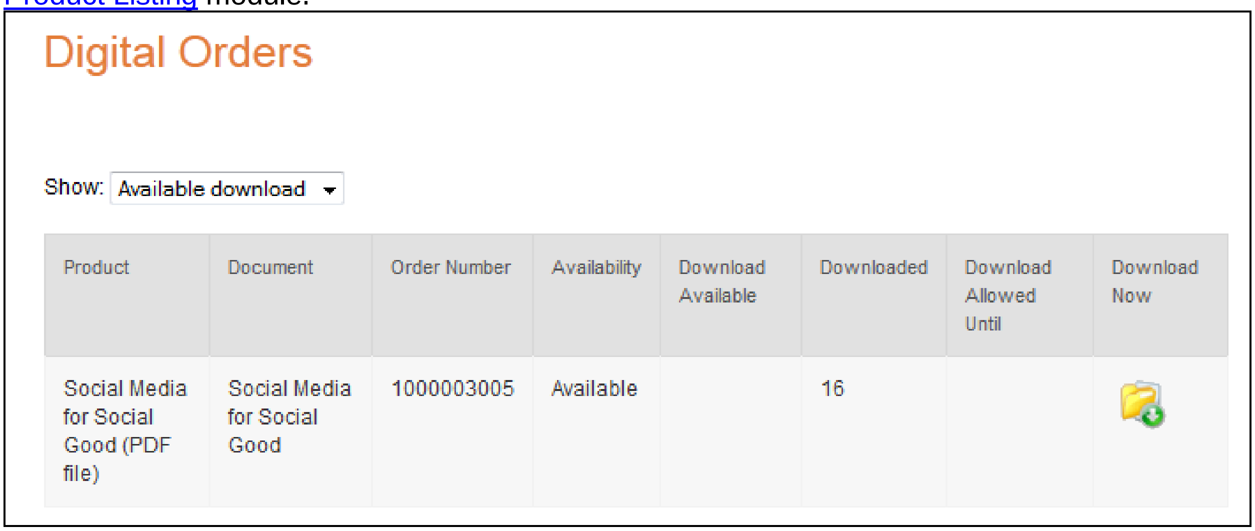
Configuring the Customer DCD Files Web Module

The Customer DCD (Digital Content Delivery) Files web module allows your customers the ability to download DCD products they have purchased. When setting up this web module, you will also have to change DCD settings that have been added to the Product Detail web module. There is no setup for this web module after adding the module to a page, however, other modules need to be configured for DCD to work properly. The necessary setups for DCD can be found at the following sections:

- Product Detail Web Module
- Order Summary Web Module

Customer Impact

Starting with 7.3.0, the workflow for the purchasing of a DCD product parallels with that of purchasing other products. Initially, the customer must find the product they want from the Product Listing module.



Digital Orders

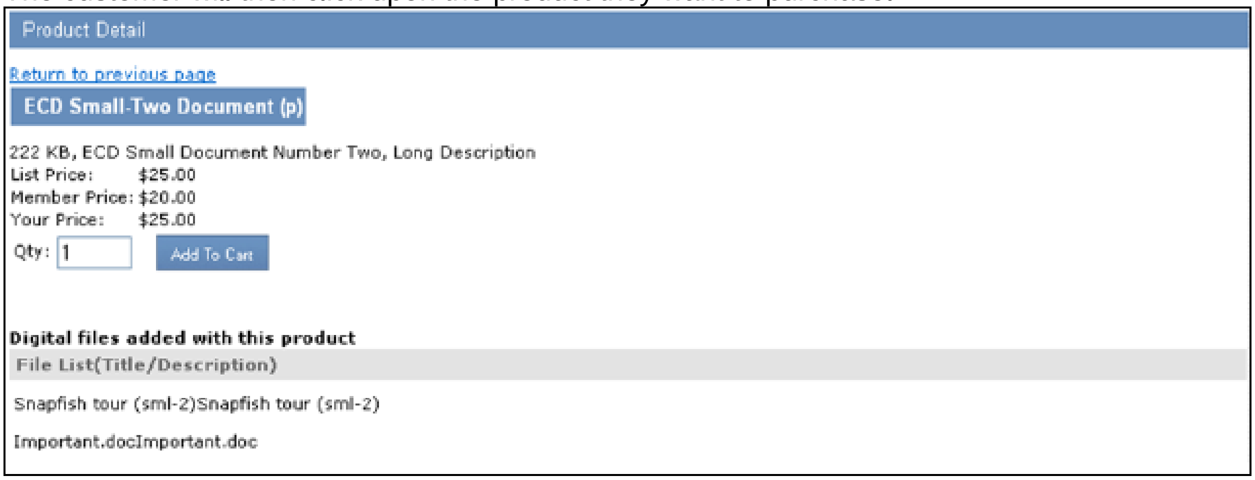
Show: Available download

Product	Document	Order Number	Availability	Download Available	Downloaded	Download Allowed Until	Download Now
Social Media for Social Good (PDF file)	Social Media for Social Good	1000003005	Available		16		

There are options to **Add to Cart** or **Add To Wishlist** from the Product Listing module, similar to purchasing other products.

Note: If your DCD product contains more than one download with it, the customer receives all the downloads you associated with it by purchasing the product once. Personify recommends detailing in the DCD product description how many downloads your DCD product contains. This can ensure your customers know they only need to purchase one order of the product to receive those downloads rather than purchasing multiple orders to receive the multiple downloads.

The customer will then click upon the product they want to purchase.

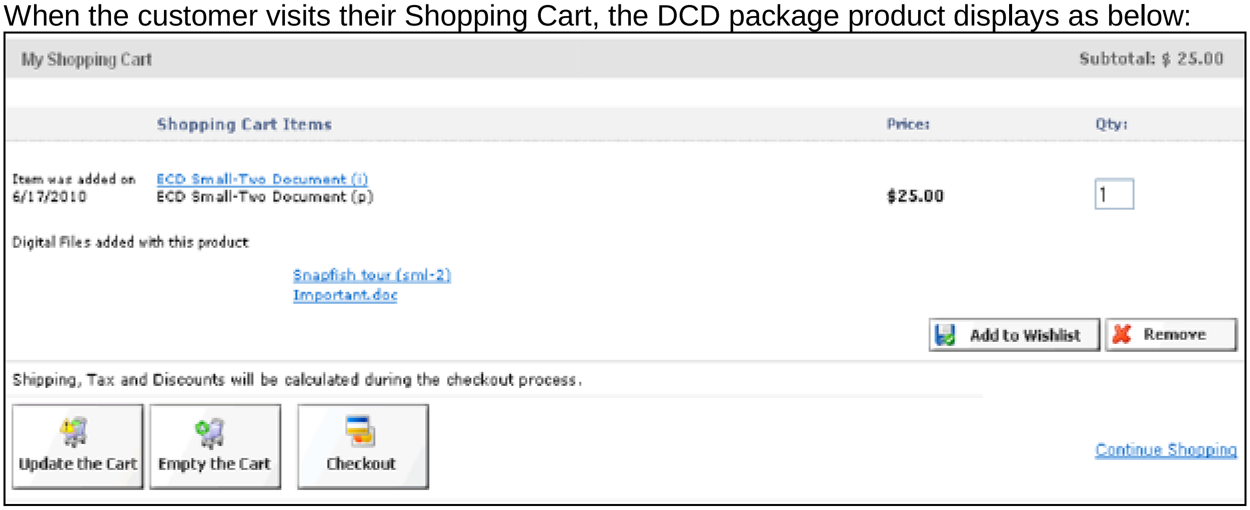


In this example, the one DCD product has two downloads, which are both included in the single List Price of $25 for non-members and $20 for members.

The customer enters how many instances of the DCD package they wish to purchase (Qty.) and click **Add to Cart**. A notification displays saying the product(s) have been added to the shopping cart.

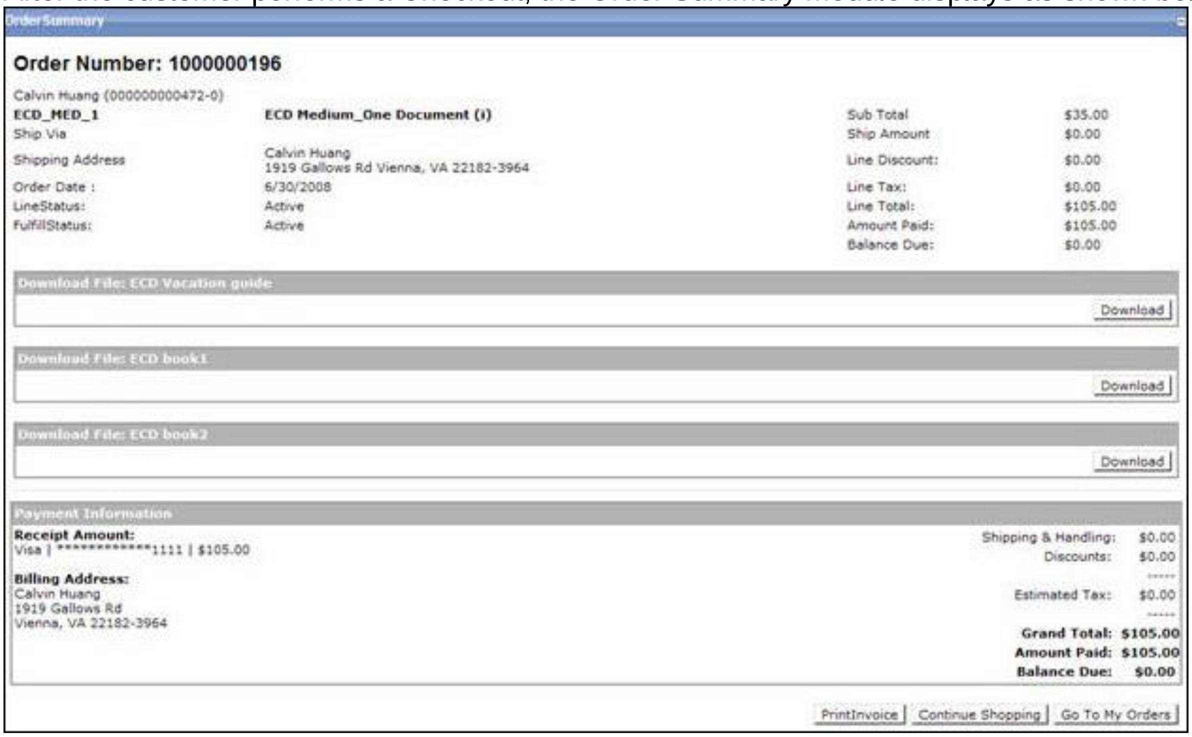
Note: The quantity is based on the entire DCD package. Keep in mind that users receive one instance of each downloadable file you add to the entire DCD package product for each instance of the DCD package product they buy.

When the customer visits their Shopping Cart, the DCD package product displays as below:



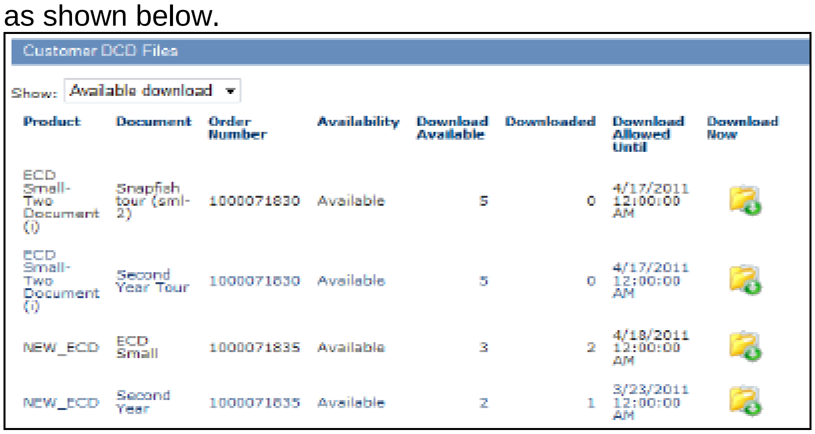
Note: The amount of times (quantity) a DCD product can be downloaded is determined during the back office setup of the product.

After the customer performs a Checkout, the Order Summary module displays as shown below.



The DCD files display on the Order Summary screen. Depending on your setups for the Order Summary web module, when the customer clicks "Download," the file automatically begins to download to their computer or the customer is taken to the Customer DCD Files module.

Depending on your setup, the customer may be taken to the Customer DCD Files web module as shown below.



This module displays the DCD products the customer has purchased, whether or not the product is still available for download (due to expiration dates or amount of time downloaded), amount of downloads still available, the expiration date (if applicable), and the ability to download the file.

Configuring the Mini Shopping Cart Web Module

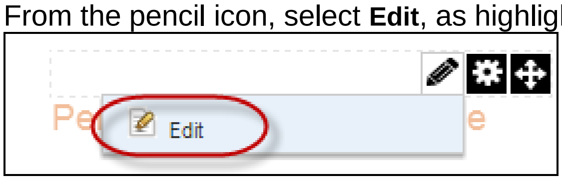
The Mini Shopping Cart web module can be thought of as a “light” version of the Shopping Cart web module. This web module simply displays the number of items in your shopping cart and the subtotal.

To configure the Mini Shopping Cart web module:

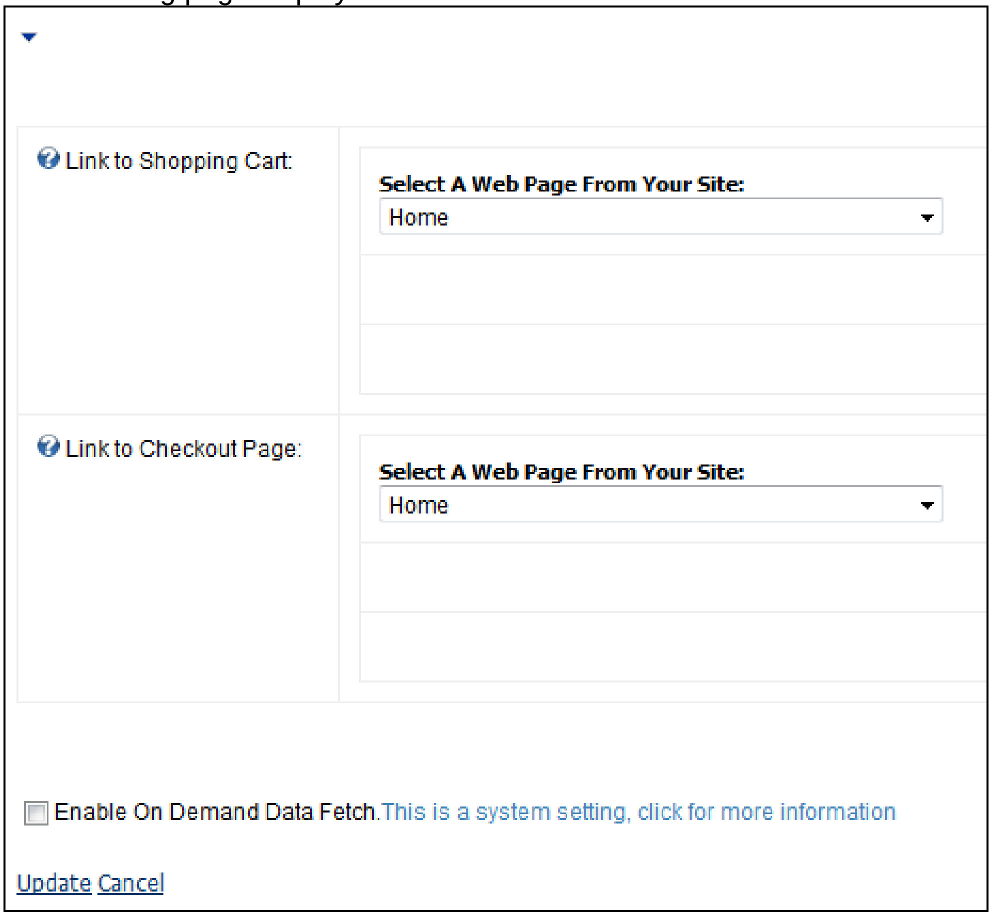
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Mini Shopping Cart web module.

3) Add the **Personify – Mini Shopping Cart** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

   (1) **Link to Shopping Cart** - Drop-down. This setting allows you to link the mini shopping cart to the Shopping Cart page.
   (2) **Link to Checkout Page** - Drop-down. This setting allows you to link the mini shopping cart to the Checkout page.

6) Click **Update**.

Customer Impact

After setting up the Mini Cart module, it may appear, as below, to your customer.

Once you add items to your shopping cart from your online store, the mini shopping cart will also change to reflect the number of items you have in your cart and, if applicable, the subtotal.

Configuring the Shopping Cart Web Module

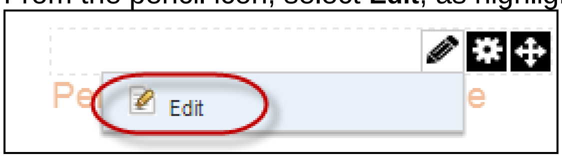
The Shopping Cart web module is a holding area where you can place items that you wish to buy from the online store. The Shopping Cart web module lets you store product information, such as name, quantity, etc. However, it does not handle actual order processing. This is done using the Order Payment web module.

To configure the Shopping Cart web module:

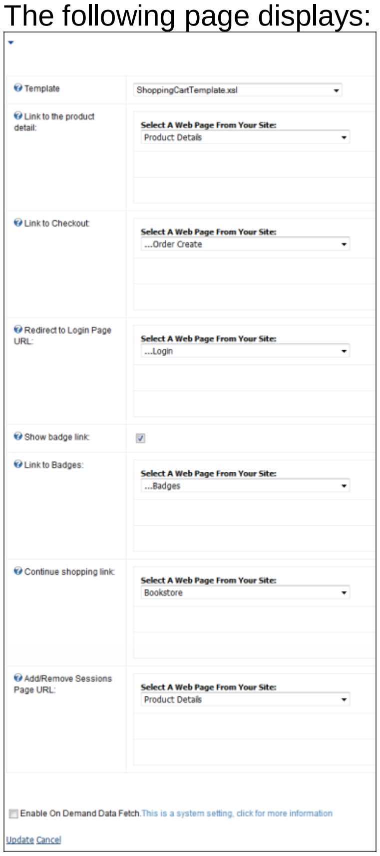
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Shopping Cart web module.

3) Add the **Personify – Shopping Cart** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



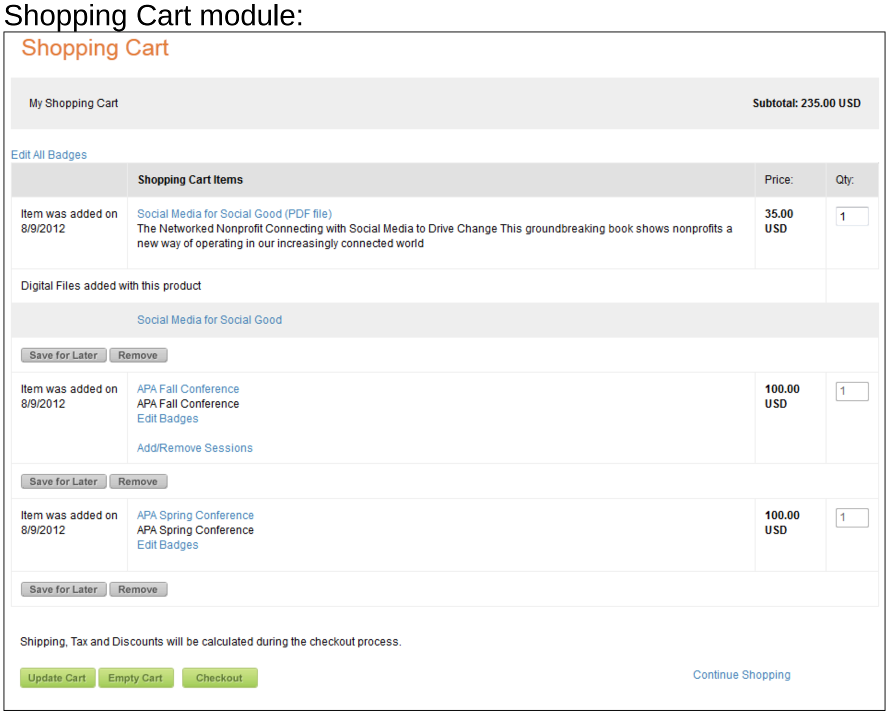
5) Configure the appropriate module settings as described below:

   a) **Template** - Drop-down. This setting allows you to choose the way in which you want the module to display.
   b) **Link to the product detail** - Drop-down. This setting allows you to determine which page to display if the customer clicks on the product name of the item in the shopping cart
   c) **Link to Checkout** - Drop-down. This setting allows you to determine which page to display if the customer clicks the Checkout button.
   d) **Redirect to Login Page URL** - Drop-down. This setting allows you to redirect the customer to the login page if the customer is not logged in when trying to checkout from the shopping cart.
   e) **Show badge link** - Checkbox. When checked, the Show Badge link displays to the customer.
   f) **Link to Badges** - Drop-down. This setting allows you to determine which page to display if any badges are available for a particular product.
   g) **Continue shopping link** - Drop-down. This setting allows you to determine the page to which the customer is directed to upon clicking Continue Shopping.
   h) **Add/Remove Sessions Page URL** - Drop-down. This setting allows you to determine which page the customer is directed to upon clicking Add/Remove Sessions. This is primarily used for Meeting products where a customer may want to add or change different breakout sessions of the meeting.

6) Click **Update**.

Customer Impact

Once you set the desired settings, customers will see the following windows when viewing the Shopping Cart module:



In this example the customer has purchased two meeting products.

The Add/Remove Sessions links allow the customer to add breakout session products to the associated meeting product. The customer can purchase additional breakout sessions at any time after purchasing the initial meeting product.

If the customer has already purchased one session, but he/she is allowed to purchase more than one of the same session, he/she can do so from this screen by editing the number in the entry field next to the associated session before clicking Update the Cart.

The customer can also view any components that are automatically given to the customer upon purchase of a product. By clicking the "+" sign next to the "The following items are included as a part of the product." label, the customer can see any component products. Clicking on any of the component products takes the customer to that product's Product Detail page.

Note: If a product that has components is added to the Wish List, that product's components can also be viewed in the same manner.

Note: Your portal alias table needs to hold all the combinations of aliases for your site. For more information, please see Working with Portals.

Configuring the DNN Web Services Web Module

The DNN Web Services web module allows you to add products to the shopping cart from your third-party vendors. Any products, including those not in the database, can now be added to the shopping cart from another of your vendor sites.

This module does not need to be added to a page on your site, does not require any setup, and has no user interface. The module only needs to be installed on your site.

Note: DNN version 5.4 is the supported version for 7.4.0

Upon installing the module on your site, you must go to ".../personifyshoppingcart.asmx". Here you will see the six web methods:

- [AddDCDFilesToCart]
- [AddDCDFilesToWishList]
- [AddMainProductToCart]
- [AddMainProductToWishList]
- [AddSubProductToCart]
- [AddSubProductToWishList]

Clicking upon any of these methods takes you to the Simple Object Access Protocol (SOAP) for that method.

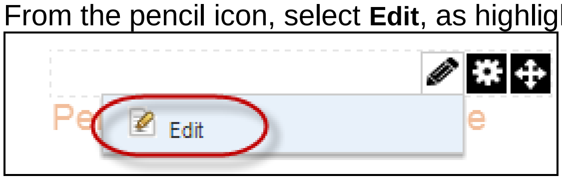
Customizing the Advanced Shipping Web Module

The Advanced Shipping web module allows e-Business customers to manage advanced shipping needs for their accounts. For example, if you wish to add a different shipping address to an order.

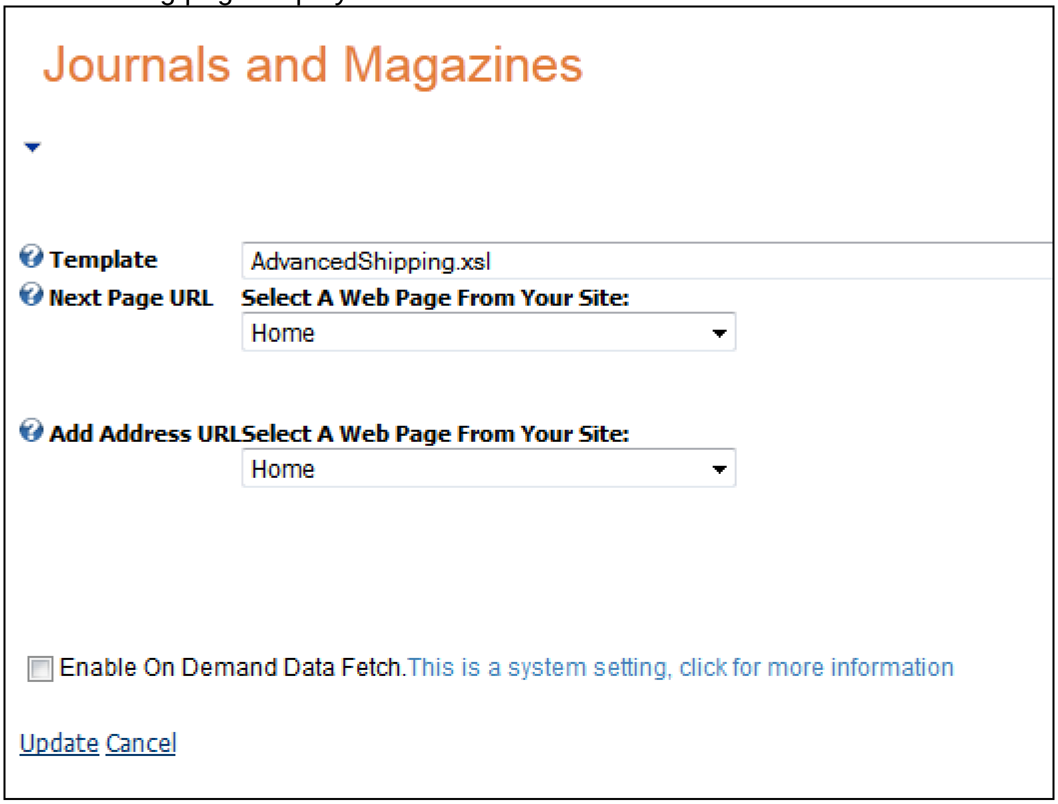
The Advanced Shipping Web Module has three options available that allow you to dictate how the web module behaves and appears.

To configure the Advanced Shipping web module:

1) Log into your site as Host.
2) Navigate to the appropriate page on your site where you want to add the Advanced Shipping web module.
3) Add the **Personify – Advanced Shipping** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



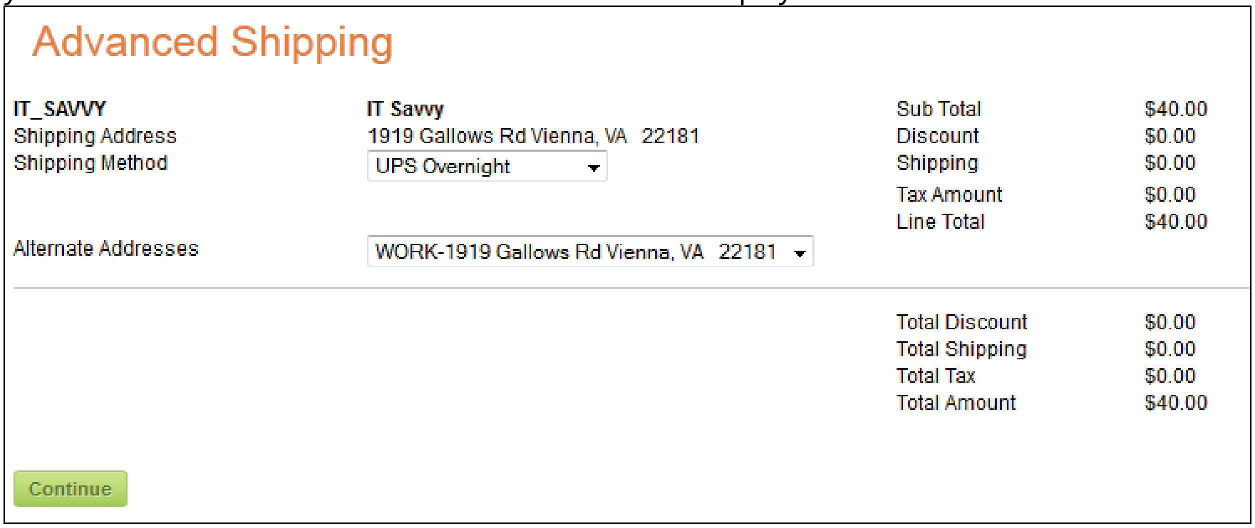
5) Configure the appropriate module settings as described below:

   a) **Template** – Drop-down. Drop-down. This setting allows you to apply the default, or any customized template to the Advanced Shipping web module's appearance. The default template is AdvancedShipping.xsl.
   b) **Next Page URL** – Drop-down. This setting determines where the customer is redirected when the Next Page button is clicked.
   c) **Add Address URL** – Drop-down. This setting determines where the customer is redirected when the Add Address button is clicked.

6) Click **Update**.

Customer Impact

Depending on the parameters you selected when setting up the Advanced Shipping module, your customers will see the module similar to the one displayed below.



In the example above, the customer has the option of choosing by which shipping method they would like their purchased product shipped. The customer can also choose which address, if they have multiple, they would like the product shipped to.

Clicking **Continue** takes the customer to the Order Payment web module.

Configuring the Reporting Web Module

The Reporting web module allows you display BusinessObjects reports on your websites. There are two parts to configuring this web module:

1) Editing the Master Report List.

2) Editing the Reporting Settings.

Editing the Master Report List

To edit the master report list:

1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Reporting web module.

3) Add the **Personify – One Click Donation** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit Master Report List**.
   The following page displays:

5) Configure the appropriate module settings as described below:

   a) **Report Icon** - Read only table column. If an icon has been selected from the Report Icon File Name drop-down, it will appear in this column.
   b) **Friendly Name** - Text field. Enter the display name for the report.
   c) **Report Name with Path** - Text box. The file path on your database where the report can be found.

Note: This needs to be entered manually. There are plans to have e-Business obtain this file path programmatically in a future release.

   d) **Report Icon File Name** - Drop-down. Allows you to select an icon from database that you want to visually represent your report.
   e) **Add** - Button. After entering the Friendly Report Name and Report Name with Path the Add button enters the information into the table.
6) Click **Add**.
7) Click **Back**.

Note: Your report information is saved when you click Add. It is for this reason that there is no Update link as in the other web modules.

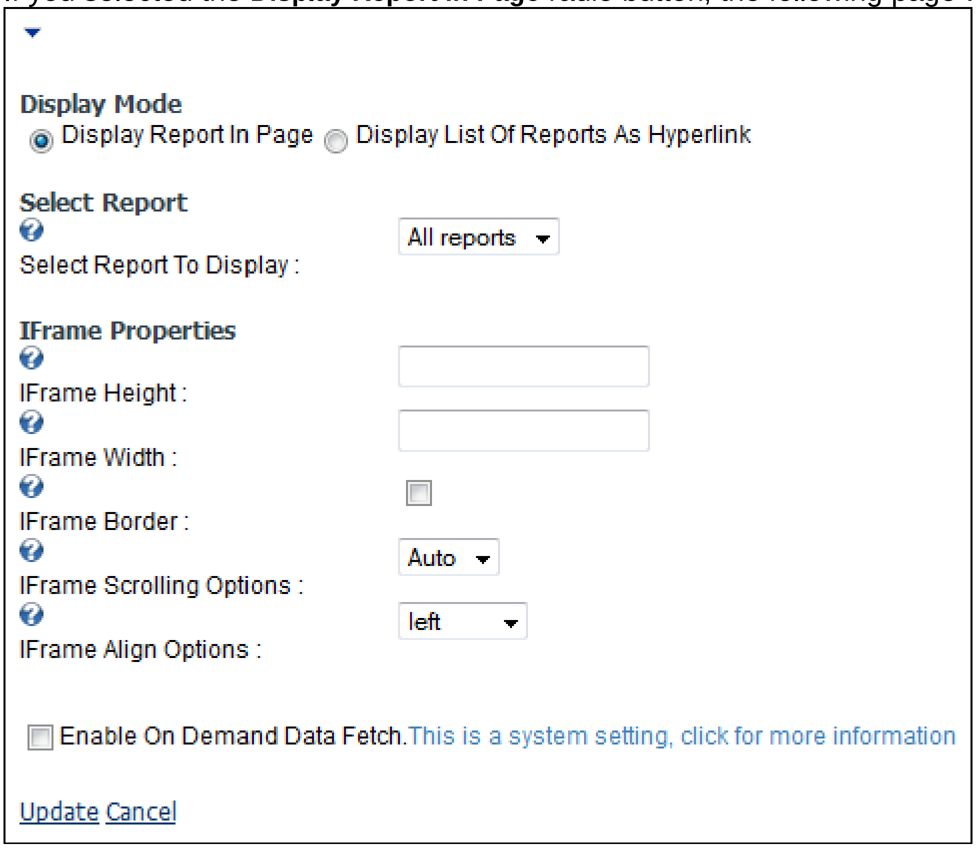
Editing the Reporting Settings

To edit the report settings:

1) Click **Edit Reporting Setting** from the drop-down or the link below the web module.
   The Edit Reporting Settings screen displays with the following options:
   a) **Display Report In Page** - Radio button. When this option is selected, the BO report displays within the page. You may only display one report per web part when this option is selected.

b) **Display List of Reports As Hyperlink** - Radio button. When this option is selected, the BO report displays in a new window. This option allows you to provide multiple reports within the web part.

2) If you selected the **Display Report in Page** radio button, the following page will display:



a) Configure the appropriate module settings as described below:

i) **Select Report To Display** - Drop-down. When the "Display Report In Page" option is selected, you may only display one of the reports you set up in the Edit Master Report List section. The reports display in this drop-down.

Note: If Display Report In Page is selected you can only display one report.

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ii) **IFrame Height** - Text box. This is the height (in pixels) the report will display in. This defaults to 200.

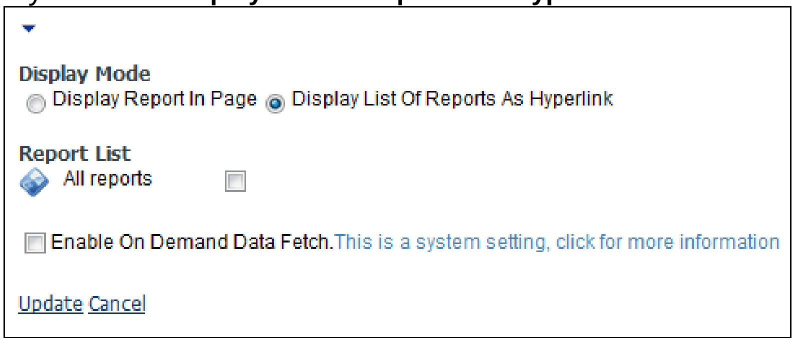
iii) **IFrame Width** - Text box. This is the width (in pixels) the report will display in. This defaults to 200.

iv) **IFrame Border** - Checkbox. Allows you to select whether or not you want a border to display around the report.

v) **IFrame Scrolling Options** - Drop-down. Allows you to select whether or not you want the customer to be able to scroll through the report or whether you want the system to automatically determine when scrolling is necessary.

vi) **IFrame Align Options** - Drop-down. Allows you to select where to align the report on the page.

3) If you select **Display List Of Reports As Hyperlink:** the following page displays:



a) The list of all the Master Reports you created in the previous section displays, check the checkbox of the report(s) you want your customers to have access to.

4) Click **Update**.

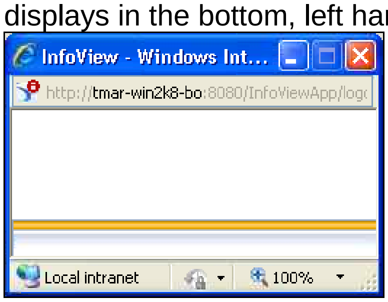
Customer Impact

After setting up the Reporting web module, it may appear, as below, to your customers:

In this example, the report is titled "All Reports."

Note:

When the customer clicks on the report and then closes the report window, a pop-up displays in the bottom, left hand corner of the screen, as shown below.



This pop-up releases the BO license from the BO server when the customer closes the report in order to reduce the number of licenses used. This pop-up is required, but will not stop the customers from proceeding.

Configuring Web Modules for Meetings

Configuring the Advanced Meeting Web Modules

The Advanced Meeting and Advanced Meeting Menu web modules work together to provide your organization the means to easily display large meetings and meeting sessions to your customers. Prior to the release of the Advanced Meeting modules, if a meeting had hundreds of sessions, these sessions were all listed on the Product Detail page and could not be easily sorted. There was no easy way for a customers to organize their time at the meeting/conference when selecting sessions to register for.

The Advanced Meeting modules provide your customers with the following pieces of functionality:

- A view of all sessions in the meeting sorted by date and time, track, or speaker.
- A "My Agenda Builder" area allowing customers to add sessions to his/her "My Agenda" calendar regardless of any business rules and eligibility requirements to register/purchase the sessions.
- A "My Agenda" calendar displaying all sessions the customer added as well as any personal appointments the customer added, which can then be downloaded to his/her Microsoft Outlook.
- Ability to add a meeting or meeting session to their Facebook and/or LinkedIn pages.
- One-click registration for customers logged into the system to register for any sessions they add to their agenda AND qualify for according to your organization's business rules.

The Advanced Meeting Web Module only displays meeting products that have not passed their registration date when the customer logs into the website. Also, the Advanced Meeting Web Module only displays sessions created with a value of "Y" for the "Available to Agenda" flag in the database.

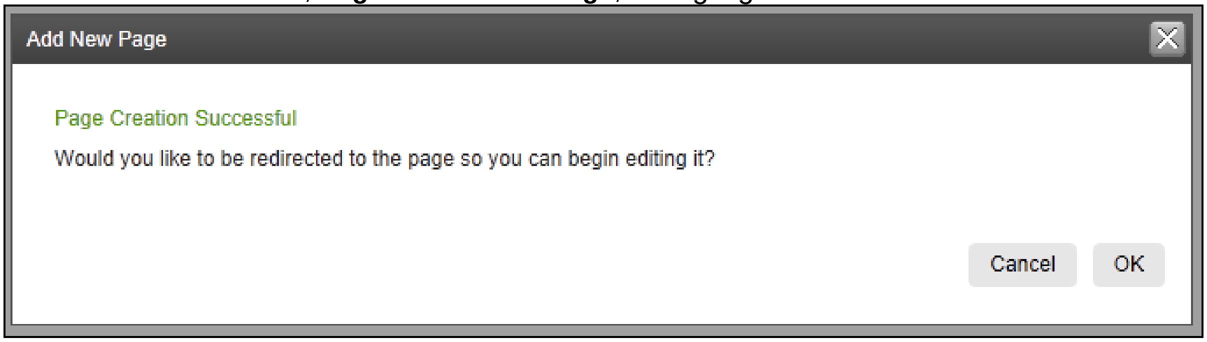
Note: Personify recommends that you place the Advanced Meeting web modules on a blank page on your site.

Creating a Blank Page

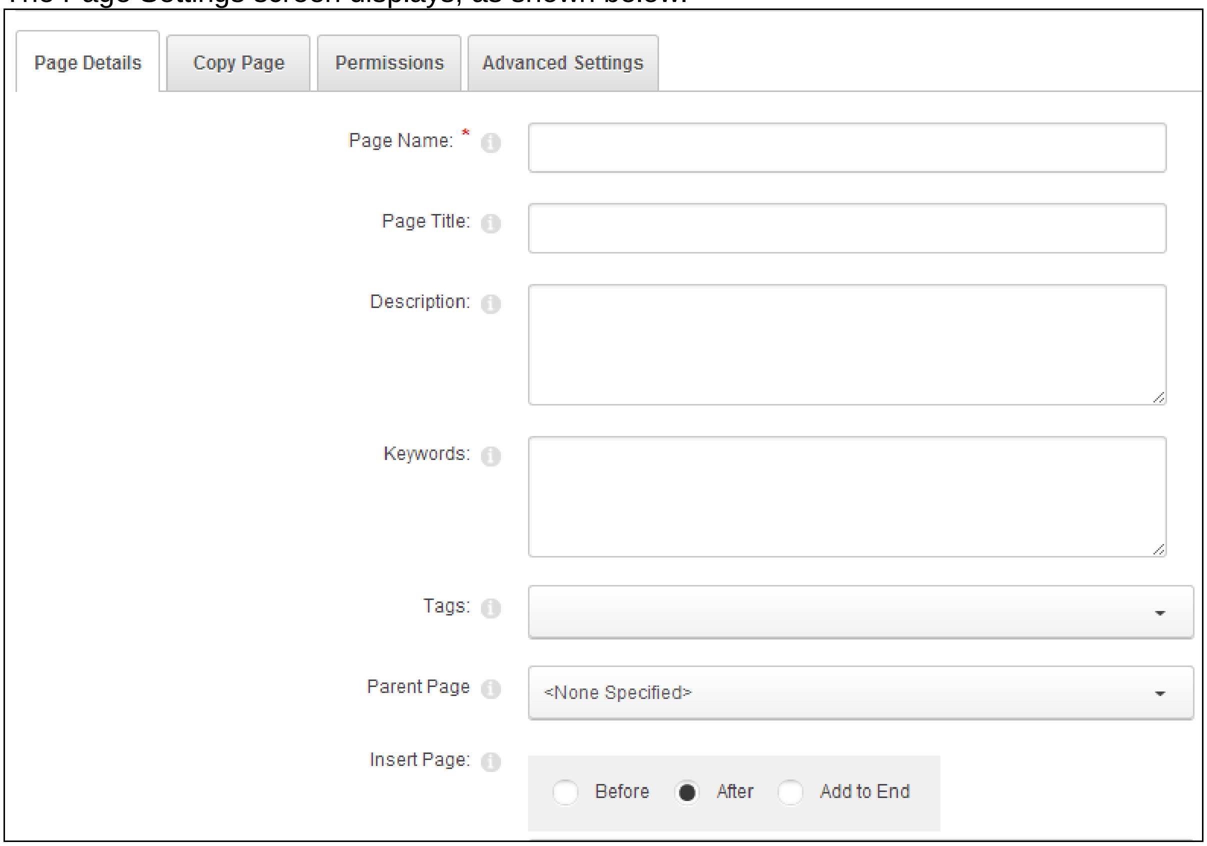
To create a blank page for your Advanced Meeting web module:

1) Log into your site as Host.

2) From the toolbar select, **Pages > Add New Page**, as highlighted below.



The Page Settings screen displays, as shown below.



3) Configure the appropriate basic settings on the Page Settings screen. See Adding a Page Using DNN for more information about page configuration settings.

Note: When uploading your small and large images, ensure that the small image is 197x290 pixels and the large image is 569x206 pixels. This will ensure that your images are not stretched or compressed.

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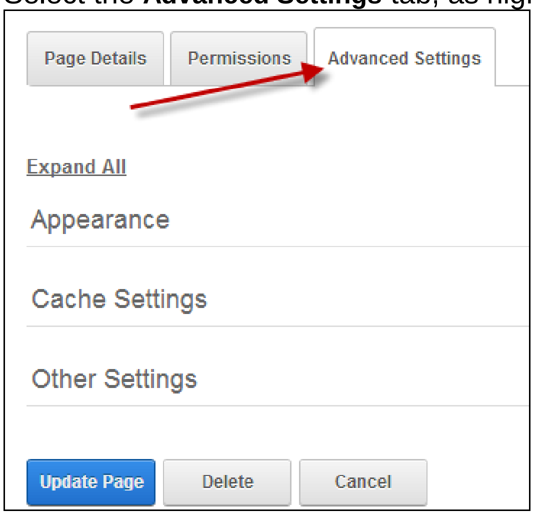
4) Click **Add Page**.
The system generates a blank page with your specifications.

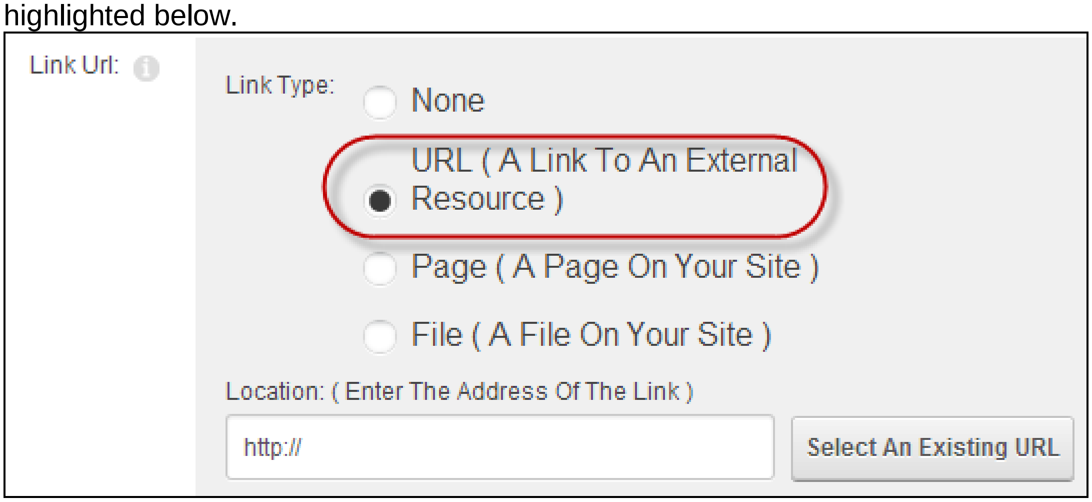
5) Observe the new page's URL and record the Tab ID value that displays next to "tabid" in the URL.

elow is 165, as highlighted below.

6) From the toolbar, select **Edit Page > Page Settings**.
   The Page Settings screen displays.
7) Select the **Advanced Settings** tab, as highlighted below.



8) Expand the **Other Sections** setting.
9) In the Link URL section, select the **URL (A Link To An External Resource)** radio button, as highlighted below.



The Location field is now enabled.

10) In the text box, enter the following URL:
`http://[Your Website]/[PageName]/tabid/[Tab ID Number]/Default.aspx?mpid=[Meeting Product ID]`

Note: The specified Meeting Product ID will affect the items displayed in the AdvanceMeeting Menu option.

11) You can configure the appropriate basic settings on the Page Management screen. See Adding a Page Using DNN for more information about page configuration settings.

12) Select the **Update Page** button.
You are returned to your newly created blank page.

Configuring the Advance Meeting Web Module

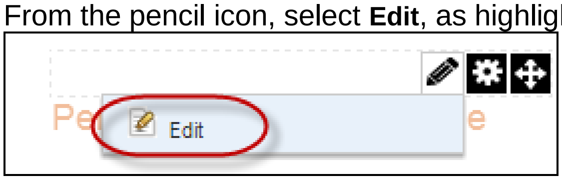
To configure the Advance Meeting web module:

1) Log into your site as Host.

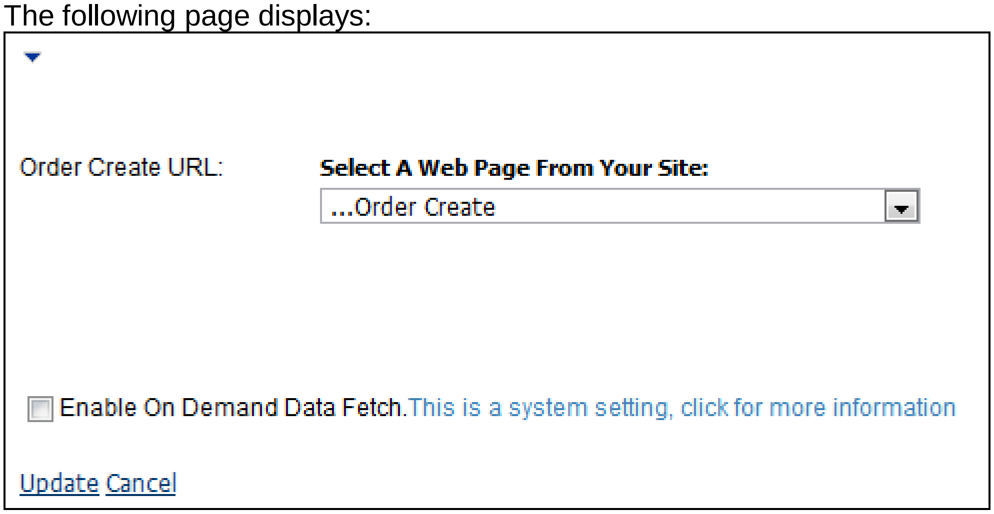
2) Navigate to the blank page you created.

3) Add the **Personify - Advanced Meeting** module to where you want it to be located on your page. See Adding a Page Using DNN for more information.

4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

   a) **Order Create URL** - Drop-down. Select the web page where your order create web module is located. This option specifies the location a user is directed on your site after clicking the Register Now button (or the Update Your Registration button if they already registered for one or more of the meetings on their agenda).

6) Click **Update.**
The My Agenda and Agenda Builder screens Appear similar to the image below based on how you set:

Note: This section does not cover [creating a Meeting product](#).

Customer Impact

Advanced Meeting – Meeting Detail Page

Depending on the setups you made during the meeting product's creation, the Advanced Meeting's home page may look like this to your customers.

- Small Image may display in the upper left corner, if it was defined in the Meeting product's setup (not shown).
- Large Image may display, if it was defined in the Meeting product's setup.
- Long Description may display, if it was defined in the Meeting product's setup.
- Menu bar which allows the customer to navigate through the meeting description, view the meeting's sessions, add the sessions to her/her agenda, or view his/her agenda.
- One-click registration button that allows the logged-in customer to register for this meeting. If the customer visit's this page after he or she has registered, the Register Now button is replaced with the Update My Registration button.

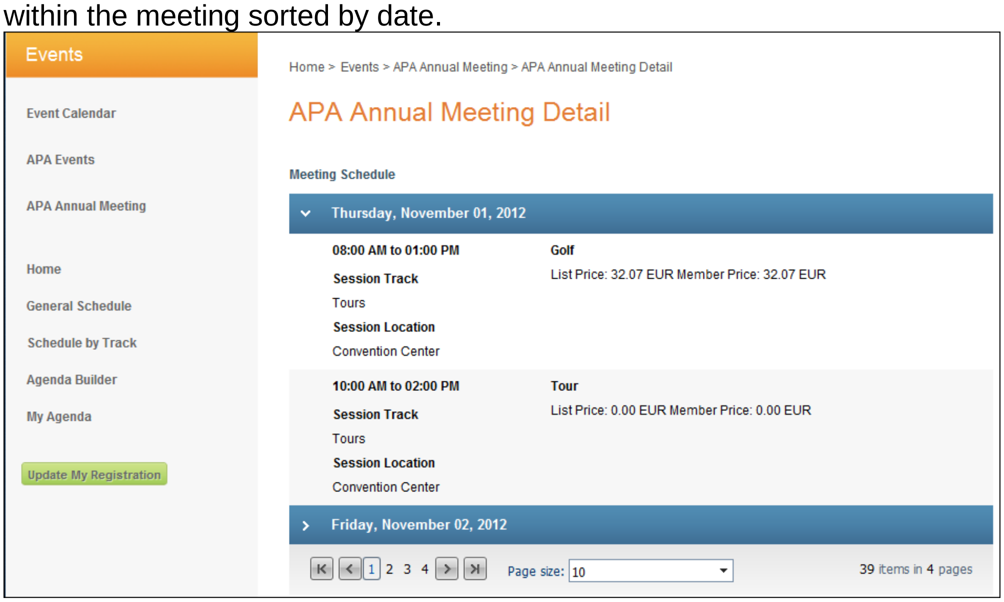
Note: When a customer registers for the meeting, the meeting product and all of the meetings the customer has added to the My Agenda screen are placed in the Order Checkout. Any meeting sessions added to My Agenda after the initial registration cannot be added to the shopping cart using this button; the user will have to manually add the sessions to his or her shopping cart.

- The number of days between the present date and the final registration date which calculates automatically upon log-in (not displayed).
- These links allow the customer to add the meeting to his or her Facebook or LinkedIn profile (not displayed).

Note: The customer can add the meeting and an agenda of desired sessions to his or her Facebook or LinkedIn profile without having to register for the meeting.

General Schedule

The Advanced Meeting's General Schedule page allows the user to view all of the sessions within the meeting sorted by date.



Schedule by Track

The Advanced Meeting's Schedule by Track page allows the user to view all the sessions sorted by Track.

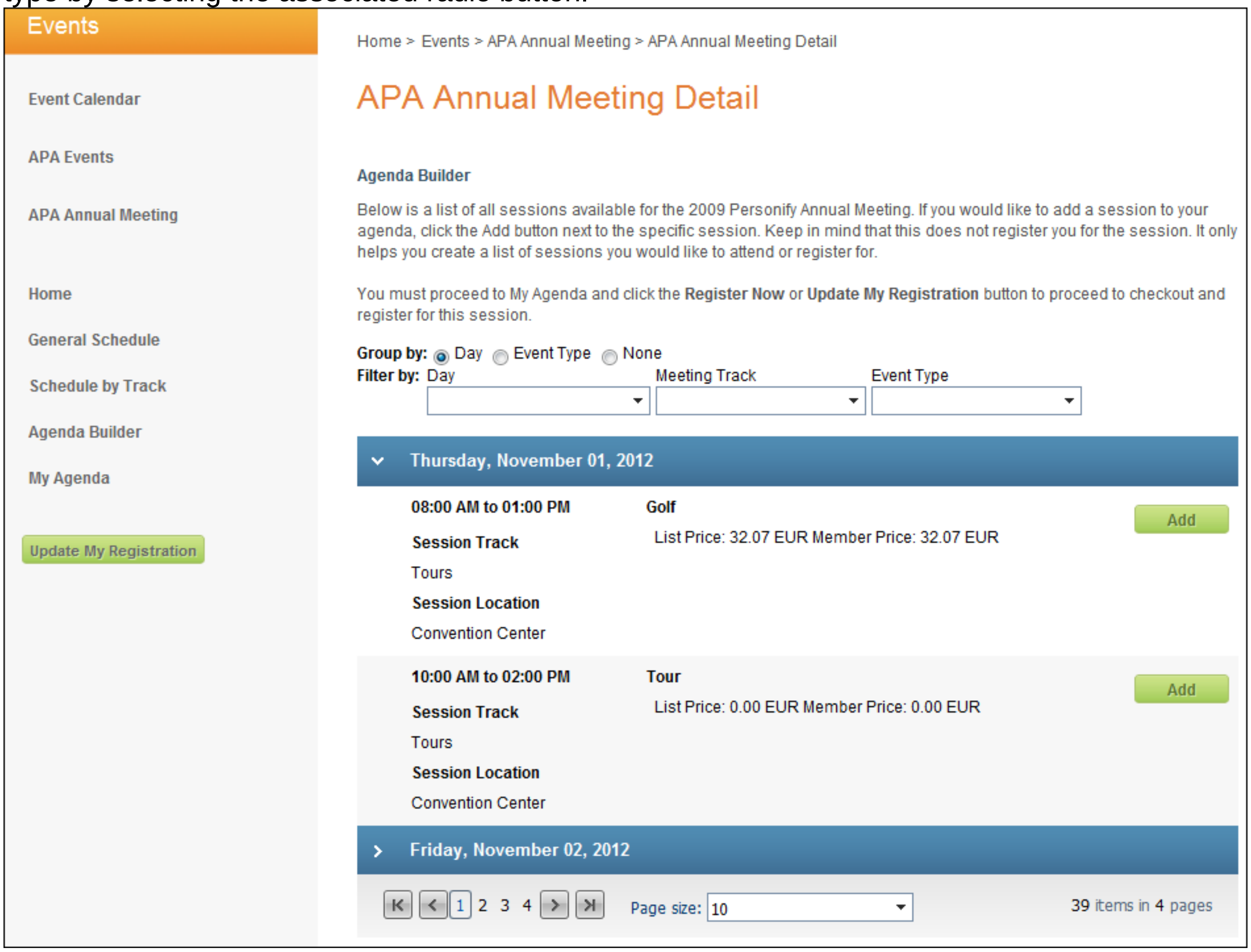
Note: Customers only see this option on the left-side menu if the meeting they are viewing has sessions assigned to different tracks.

Agenda Builder

Note: A customer cannot view this page without first logging on to the site.

The Agenda Builder page appears similar to the General Schedule page with the exception that the customer has the option to add (or remove) any of the sessions to his or her My Agenda.

The Agenda Builder page also allows the customer to filter the list of sessions by date or event type by selecting the associated radio button.



Note: When a user adds a session to his/her agenda, it does NOT create an order or register him/her for the session. It only adds it to his/her agenda for viewing/organization purposes.

My Agenda

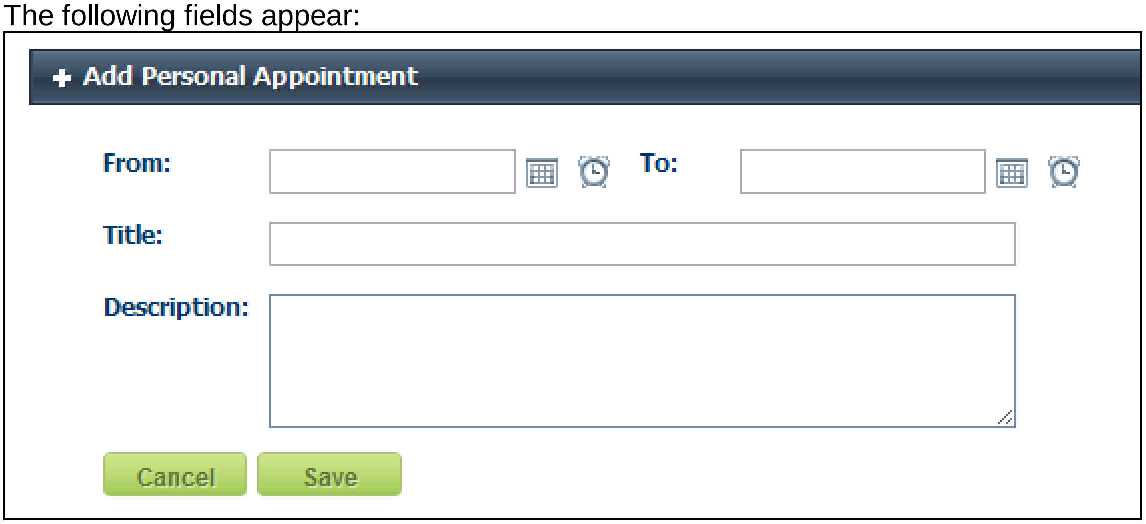
Note: Customers can not view this page without first logging on to the site.

Once your customers have added sessions to their agenda using the Agenda Builder page, they can navigate to the My Agenda page to view all of the sessions they added sorted by date and time. If a customer has added many sessions, filters are provided allowing the customer to view their selected sessions by a certain day or type.

Adding Personal Appointments

Functionality has also been provided to allow customers to add personal appointments to their agenda. For example, if a customer has arranged to meet with a colleague for dinner, he or she can add that meeting as an appointment on their agenda.

To add a personal appointment, click the Add Personal Appointment button available on the My Agenda page .
The following fields appear:



Downloading to Outlook

Once the customer is satisfied with his/her agenda, he or she can click the “Download to Outlook” button. This downloads an .ics file, which then displays all of the selected sessions and personal appointments on the customer’s Outlook calendar.

Note: Downloading My Agenda to Outlook does not register the customer to the meeting or sessions.

Uploading to Facebook or LinkedIn

Similar to downloading to Outlook, once the customer is satisfied with his/her agenda, he or she can click the “Add event to my Facebook” or “Add event to my LinkedIn” button. These buttons sends the list of sessions added to his/her agenda and uploads the list to either his/her Facebook or LinkedIn profile pages.

A new window displays for the social networking site, and users are prompted to enter their account information. A confirmation screen displays for them to confirm the upload. Facebook uploads the agenda as a post, and LinkedIn uploads it as an article.

Registering for Sessions

After the customer has finished adding all of their sessions to My Agenda, he or she can click Register Now and the meeting and any sessions that have a price of more than zero dollars are added to the order checkout where the customer can pay and be registered for the meetings and sessions.

Note: Not until the customer clicks **Register Now** will he or she be registered for any meetings or sessions.

Configuring the My Meetings Web Module

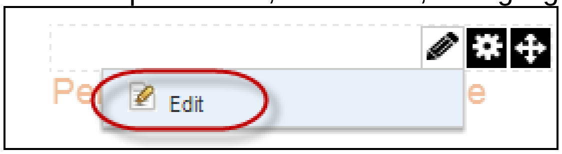
The My Meeting web module displays a list of meetings that the logged in user has purchased. It also displays links that allow you to view the agenda and order summary for the meeting(s). This web module can be used on a profile’s page to display a meeting.

To configure the My Meetings web module:

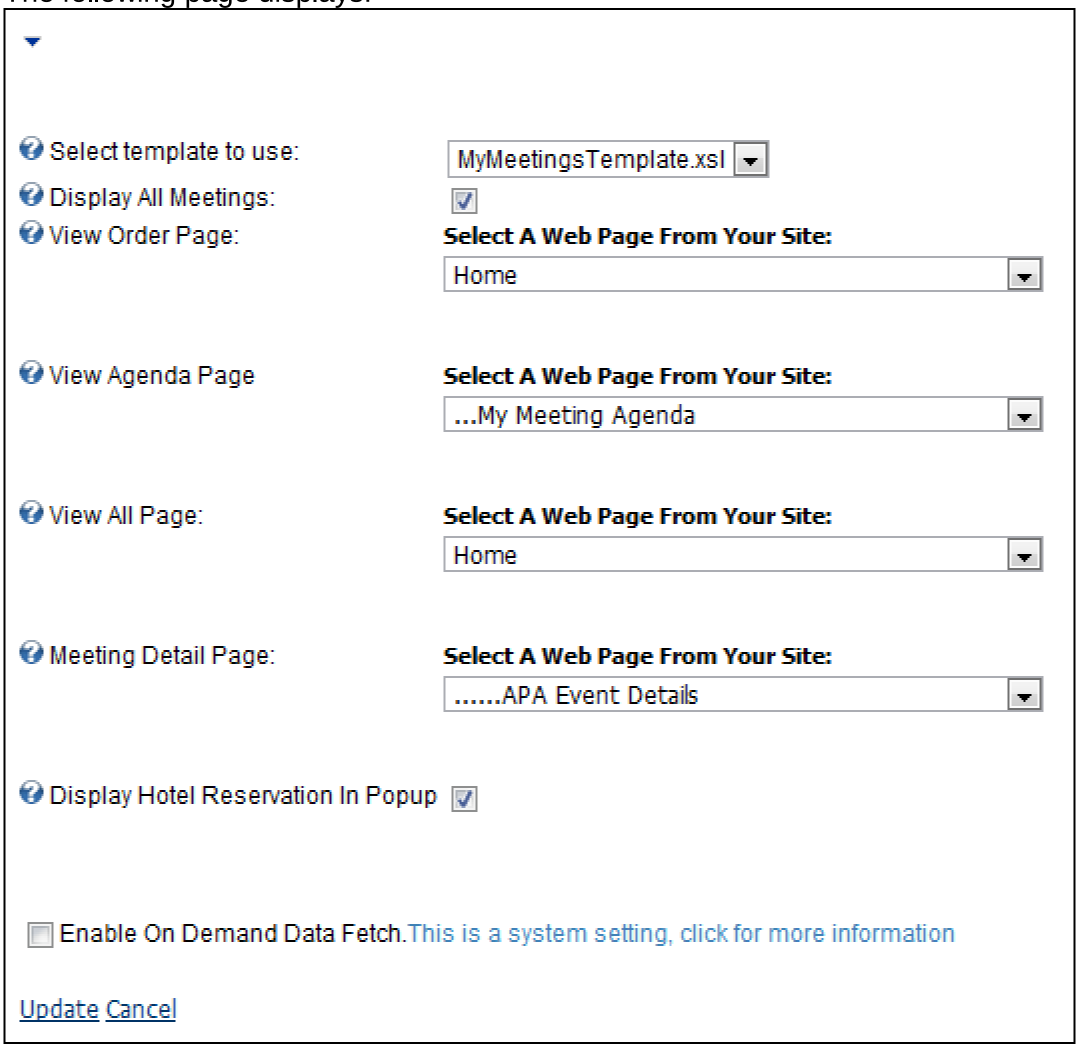
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the **My Meetings** web module.

3) Add the **Personify – My Meetings** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

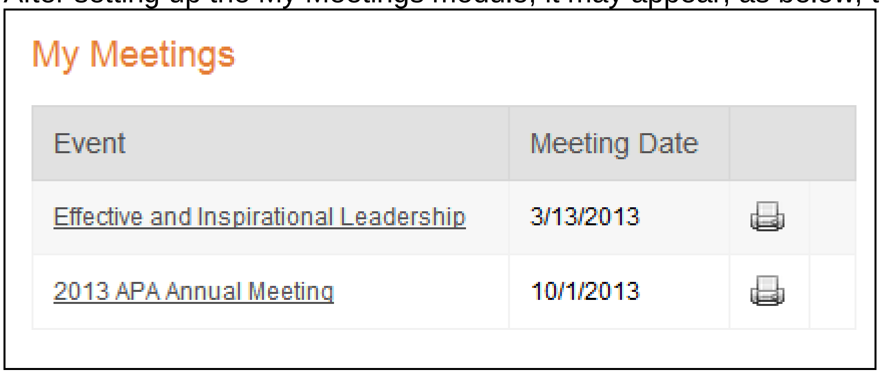
   a) **Select template to use** - Drop-down. This setting lets you determine which template is applied to your web module. The default selection is MyMeetingsTemplate.xsl.
   b) **Display All Meetings** - Checkbox. When checked, all meetings for which the user is registered display.

c) **View Order Page** - Drop-down. This setting lets you determine which page to display for the View Order Page link. Select Order Summary under Shopping Cart.
d) **View Agenda Page** - Drop-down. This setting lets you determine which page to display for the View Agenda Page link. Select My Meeting Agenda under My Personify.
e) **View All Page** - Drop-down. This setting lets you determine which page to display for the View All Page link. Select Meeting under Online Store.
f) **Meeting Detail Page** - Drop-down. This setting lets you determine which page to display for the Meeting Detail Page link. Select Product Detail.

6) Click **Update**.

Customer Impact

After setting up the My Meetings module, it may appear, as below, to your customer.



The customer's purchased meeting products display. The customer has a number of options:

- Clicking on the meeting product name opens the Product Detail page for the meeting product.
  From the Product Detail page, the customer can then either add/delete the desired sessions for the meeting or add another registration (for a guest, for example) and update his/her Shopping Cart.
- Clicking the magnifying glass icon (not shown) opens the Order Summary page for the meeting product.
- Clicking the calendar icon (not shown) opens the My Meeting Agenda page for the meeting product.
- Clicking the printer icon prints a summary of the meeting.
- Clicking the "+" icon opens the Product Detail page allowing the customer to add breakout sessions to the meeting product.

Note: The "+" icon will NOT be displayed if there are no sessions defined for the meeting product.

As mentioned earlier, from the Product Detail page, the customer can then either add/delete the desired sessions for the meeting or add another registration (for a guest, for example) and update his/her Shopping Cart.

Configuring the My Meeting Agenda Web Module

The My Meeting Agenda web module is designed to display your current meeting and session registrations. Once you register for a meeting, the complete agenda appears via the My Meeting Agenda web module.

Note: If a customer is registered for a meeting or session that is not web-enabled, the meeting/session still displays in the My Meeting Agenda web module; however, the customer cannot click on the Product Detail or Add Session links. Disabling these links restricts him/her from modifying existing any meeting/session registrations not enabled for the Web.

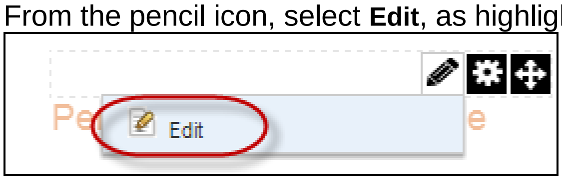
To configure the My Meeting Agenda web module:

1) Log into your site as Host.

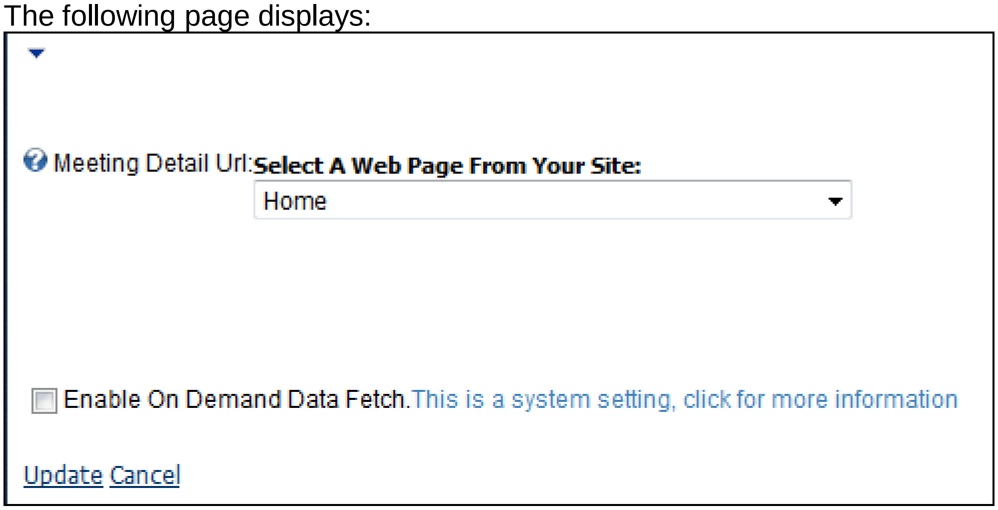
2) Navigate to the appropriate page on your site where you want to add the My Meeting Agenda web module.

3) From the Host toolbar, select the “Personify – My Meeting Agenda” option from the Module drop-down.

4) Add the **Personify – My Meeting Agenda** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
5) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



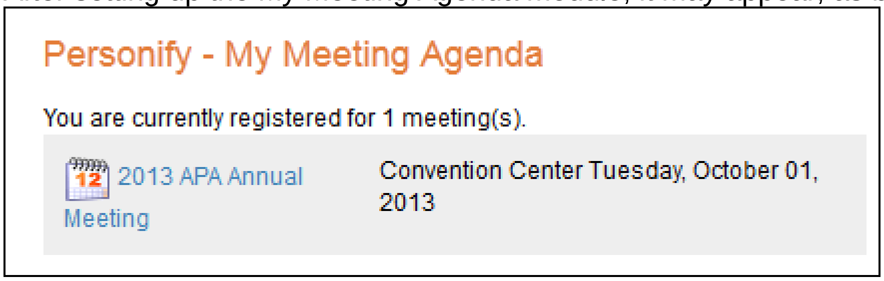
6) Configure the appropriate module settings as described below:

a) **Meeting Detail URL** – Drop-down. This setting allows you to determine the page in your website that displays meeting information.

7) Click **Update**.

Customer Impact

After setting up the My Meeting Agenda module, it may appear, as below, to your customer.



The My Meeting Agenda module displays the meeting master product, its location, and any breakout sessions.

Configuring the Calendar Web Module

The calendar web module works with the Meetings subsystem and allows your customers the ability to visualize your organization's meeting schedules via the web. Meeting products set up with the Web Display begin date less than today and the Web Display end date greater than today or blank in the back office display in the drop-down above the calendar. Your customers can then click the meeting product to be taken to the product detail page where the customer can then purchase that meeting or session product.

Note: The Calendar Web Module uses Telerik controls.

Once you have installed and set up your web module so that it is displayed in your site, you must configure it to work with your website.

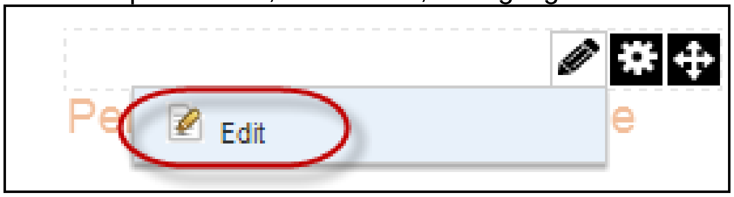
To configure the Calendar web module:

1) Log into your site as Host.

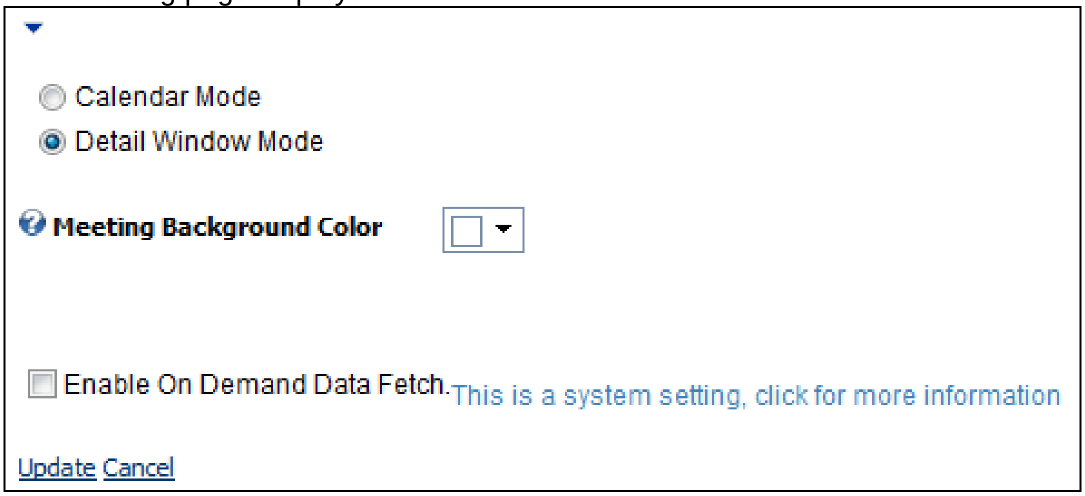
2) Navigate to the blank page you created.

3) Add the **Personify – Calendar** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.

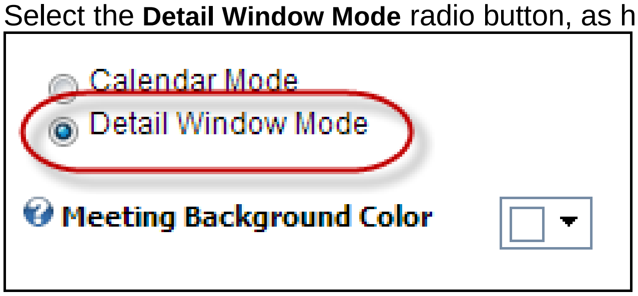
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:

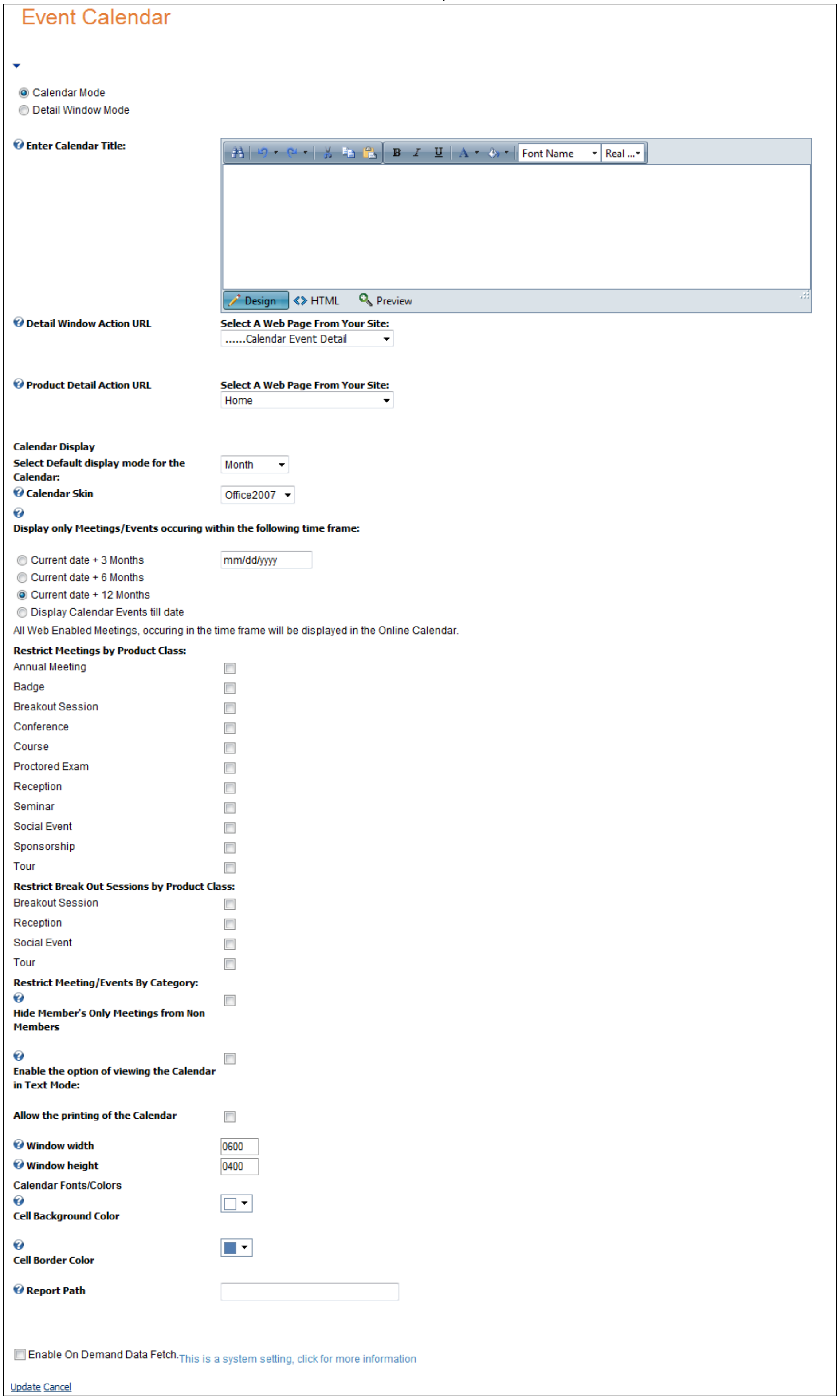


5) Select the **Detail Window Mode** radio button, as highlighted below.



6) Set the background color in which you want to display the meeting's detailed information.

7) Select the **Calendar Mode** radio button, as shown below.



Note: Select the page you set up in steps 1-3 as the Detail Window Action URL.

8) Configure the appropriate module settings as described below:
   Parameter

   a) **Calendar Mode** - Radio button. When selected, allows your customers to view your meeting product on the calendar.
   b) **Detail Window Mode** - Radio button. When setting up your calendar you must put one calendar on a page in “Calendar Mode” and create another blank page to add the calendar in “Detail Window Mode”. When a meeting is clicked upon by the customer, the customer is then taken to the detail calendar which provides more information about the meeting product.
   c) **Enter Calendar Title** - HTML input box. Allows you to enter a title for the calendar that is unique to your organization.
   d) **Detail Window Action URL** - Drop-down. This setting determines which page the customer is sent to upon clicking the meeting product within the calendar. When the customer double-clicks the meeting product, a modal window opens to the page determined here. Set this to the "Calendar Detail" page. This opens the modal window, giving the customer a brief description of the product and the times the meeting occurs. There are also options for adding the meeting to your cart or wish list.
   e) **Product Detail Action URL** - Drop-down. From the modal screen, this is where the customer is sent upon clicking on the meeting product name.

   Calendar Display

   f) **Select Default Display Mode for the Calendar** - Drop-down. This option allows you to select how the calendar will display to your customers when it loads onto the page. Available options are Day, Week, Month, TimeLine. Customers have the ability to override the default mode.
   g) **Calendar Skin** - Drop-down. Allows you to change the look and feel of the calendar.
   h) **Displays only Meetings/Events occurring with in the following time frame** - Radio buttons. Allows you to select a time frame within which valid meetings and/or events will display to the customer. Selecting a limited time period can help with performance issues.
   i) **Restrict Meetings by Product Class** - Checkboxes. Allows you to check whether you want to restrict Meeting Products or Annual Meeting products from displays on the calendar.
   j) **Hide Members Only Meetings from Non Members** - Checkbox. Allows you to hide from non-members meetings that only member customers can purchase/attend.
   k) **Enable the option of viewing the Calendar in Text Mode** - Checkbox. This allows your customers to view a text only version of the calendar.
   l) **Allows the Printing of the Calendar** - Checkbox. Allows your customers to print a copy of the calendar.
   m) **Window Width** - Text box. Sets the pixel width of the modal window that opens when a customer clicks upon a meeting product within the calendar. The page to which the modal window opens is set in the Detail Window Action URL drop-down.
   n) **Window Height** - Text box. Sets the pixel height of the modal window that opens when a customer clicks upon a meeting product within the calendar. The page to which the modal window opens is set in the Detail Window Action URL drop-down.

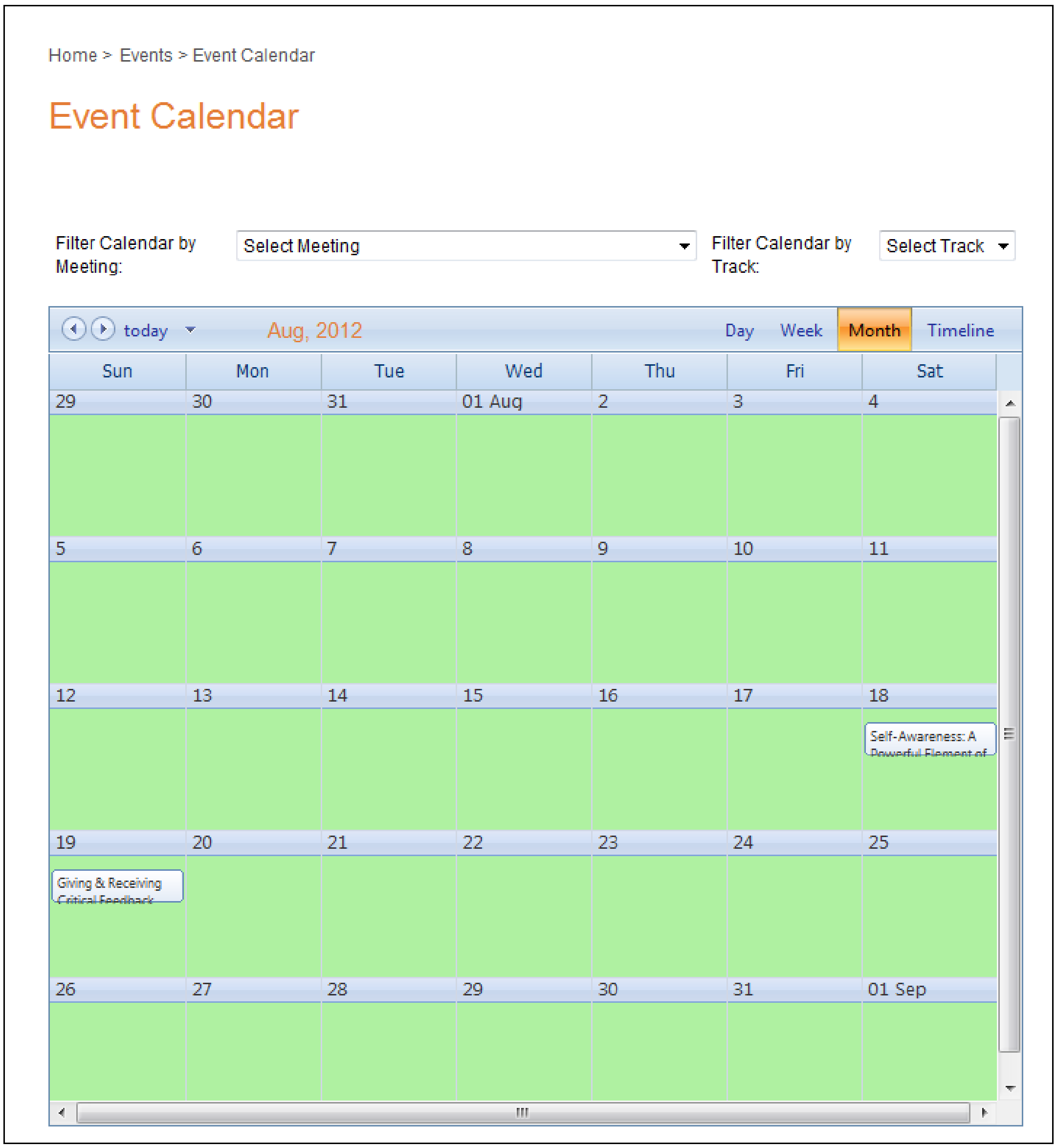
Calendar Fonts/Colors

o) **Cell Background Color** - Drop-down. This allows you to set the background color that displays for meetings occupying space in the calendar.
p) **Cell Border Color** - Drop-down. This allows you to set the color of the cell borders for the entire calendar.

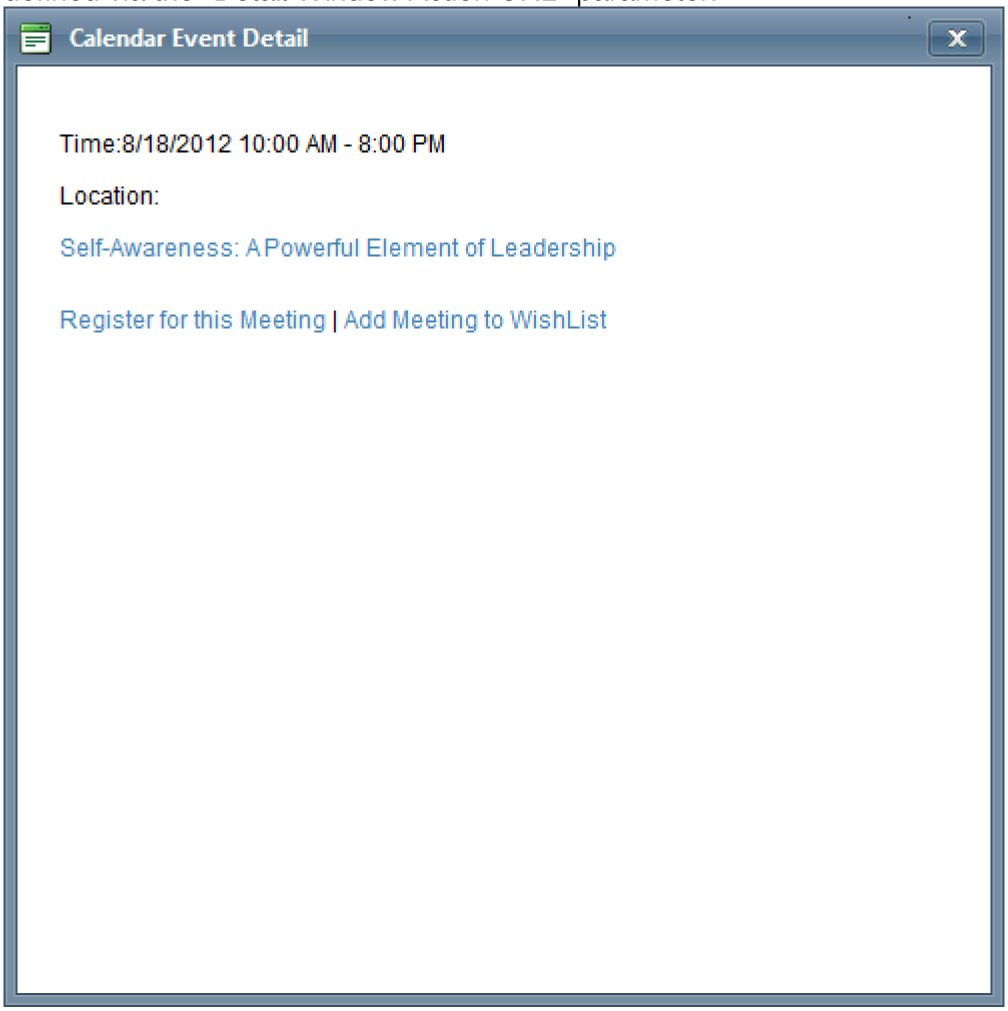
9) Click **Update**.

Customer Impact

After setting up the Calendar web module, your customers will see the module as displayed below.



When the customer double-clicks on an event, the following window displays the event detail, as defined via the "Detail Window Action URL" parameter:



Note: The Calendar Event Detail pop-up window will not display in Internet Explorer 9.

If the customer clicks the hyperlinked meeting product, they will be taken to the page defined via the "Product Detail Action URL" parameter. If the customer clicks **Register for this Meeting**, the meeting product will be added to their cart. If the customer clicks **Add Meeting to WishList**, the meeting product will be added to their cart under "Saved for Later".

Configuring the Badges Web Module

The Badges web module lists the number of badges that may be available for a meeting parent product. If any badges are used, the Badges web module provides the name of the badge holder.

Note: Badges can only be created for meeting parent products. You can not create a badge for a session unless it is considered a pre-conference session, at which point you would create the pre-conference session as its own meeting parent product, thus allowing you to create an additional badge for the pre-conference session.

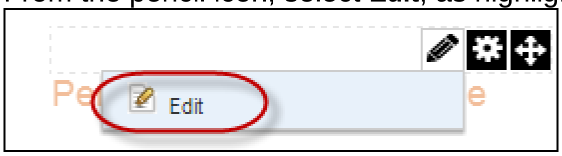
To configure the Badges web module:

1) Log into your site as Host.

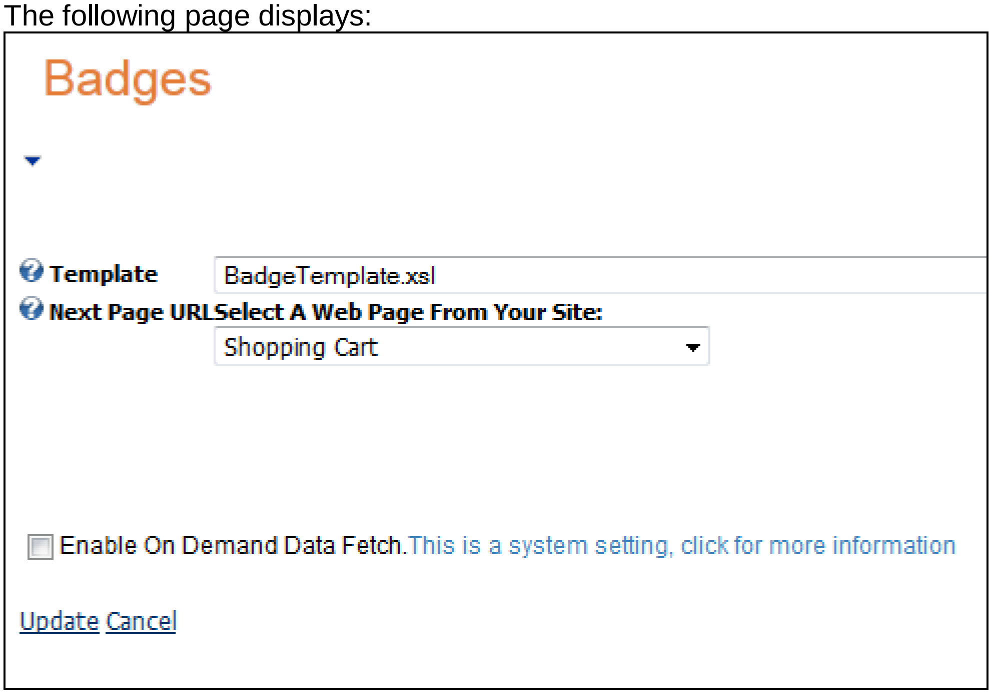
2) Navigate to the appropriate page on your site where you want to add the Badges web module.

3) Add the **Personify – Badge** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.

4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



5) Configure the appropriate module settings as described below:

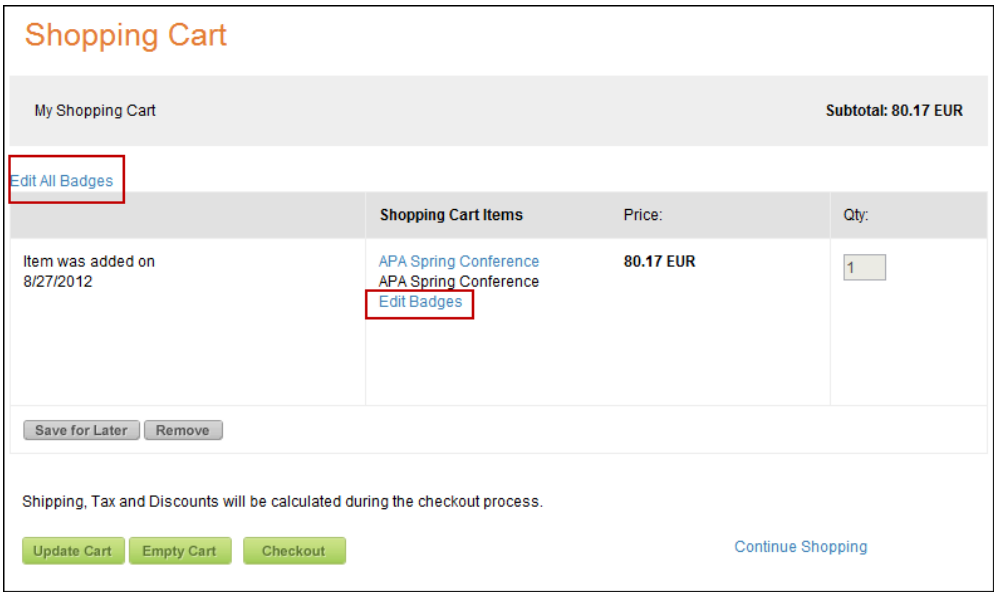
   a) **Template –** Drop-down. This setting allows you to determine which default or customized template to apply when using the Badges web module. The default is BadgeTemplate.xsl.

b) **Next Page URL** – Drop-down. This setting allows you to determine where the customer is redirected when the Save and Continue button is clicked.

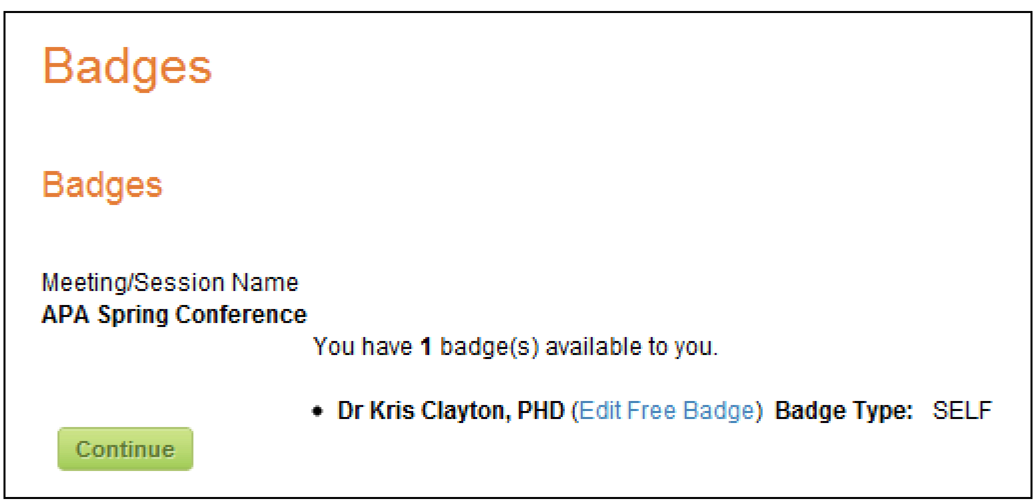
6) Click **Update**.

Customer Impact

The Badges web module is used in concurrence with the Shopping Cart module. When a customer purchases a meeting product (or any product requiring badges) a link “Edit Badges” displays under the product in the Shopping Cart web module.

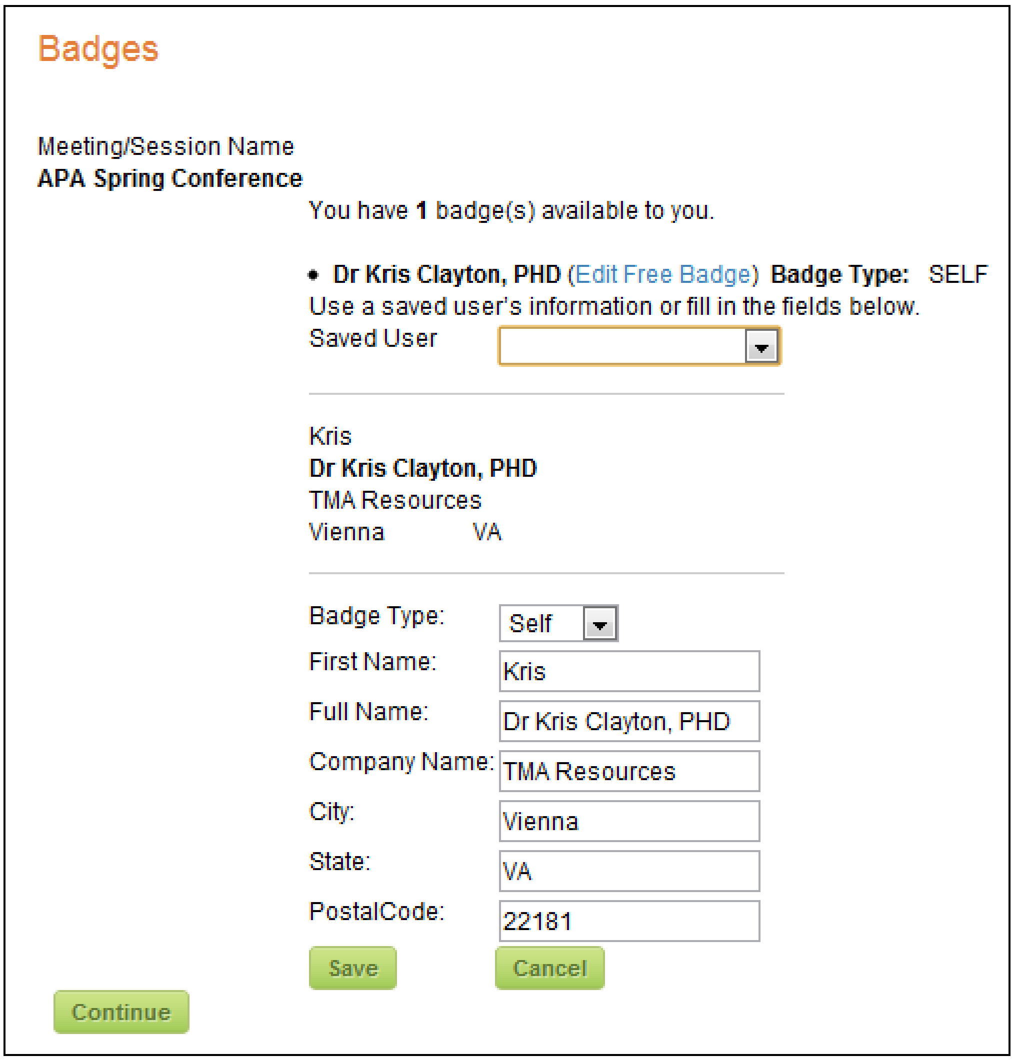


Clicking **Edit Badges** (highlighted above) opens the Badges web module.



The meeting product and any additional sessions being purchased display along with the number of badges that are awarded for purchasing the meeting product.

Clicking **Edit Free Badge** within the Badge Info column allows you to enter information about the person who will be using that badge at the meeting. You are prompted to enter whether the badge is for yourself or a guest, the person's first name, last name, company name, city, state, and postal code.



The information entered will be printed on the badge(s) when it is presented at the meeting.

Configuring Web Modules for Affiliate Management

Configuring the Affiliate Management – List Web Module

Affiliate Management in e-Business is an extension of Segmentation in the back office. You have the ability to segment customers based on a number of options:

- Committee
- Employer
- Membership
- Geographic location
- Products purchased

Note: The back office controls all permissions and setups for which customers are included in the segment(s) and what customer(s) have control over the segment(s).

The Affiliate Management List module displays all the affiliate groups for which the logged in user is assigned as the group manager. Similar to the other Affiliate Management web module, the List web module has a variety of options.

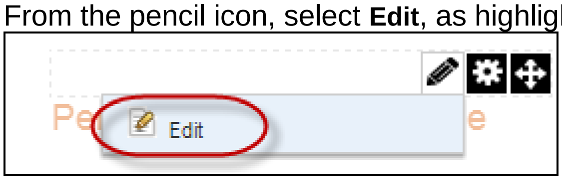
Note: The available options depend on your initial selection.

To configure the Affiliate Management – List web module:

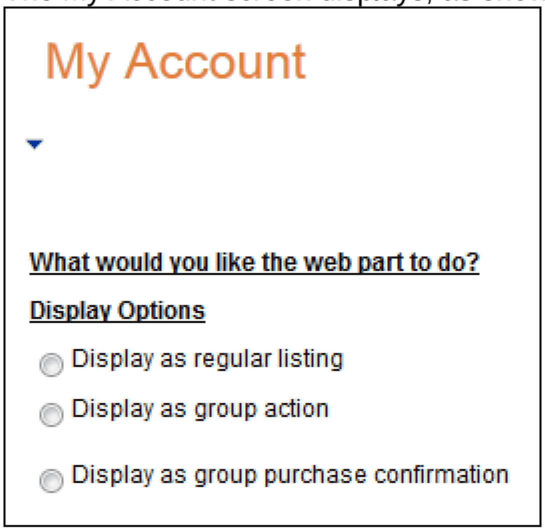
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Affiliate Management web module.

3) Add the **Personify – Advanced Affiliate Management** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The My Account screen displays, as shown below.



5) Configure the appropriate module settings as described below:

   a) **Display as regular listing –** Radio button. This option displays a list of affiliates as a regular listing.
   b) **Display as group action –** Radio button. This option confirms the group action being performed on a list of affiliates.
   c) **Display as group purchase confirmation –** Radio button. This option displays next actions on completion of a group order.

   d) If Display as regular listing" radio button is selected:

      i) **Show Search** – Checkbox. This setting enables the search panel.
      ii) **Page Size –** Text box. This setting controls the number of affiliates displayed on a page.

   e) **Show Group Action Panel** – Radio button. This setting enables the panel that contains group action options.
   f) **Show Group Purchase Panel –** Radio button. This setting enables the panel that contains group purchase options.
   g) **Purchase Action URL** – Drop-down. This setting enables the panel that contains group action options.
   h) **Allow Delete** – Checkbox. This setting enables the “Remove"• option on the context menu.
   i) **Print Roster** – Drop-down. This setting refers to the tab to which users are redirected when the Print Roster button is clicked.
   j) **Send Email –** Drop-down. This setting refers to the tab to which users are redirected when the Send Email button is clicked.
   k) **Order History –** Drop-down. This setting refers to the tab to which users are redirected when the View Order History button is clicked.
   l) **View Profile** – Drop-down. This setting refers to the tab to which users are redirected when the View Profile button is clicked.

m) **Renew** – Drop-down. This setting refers to the tab to which users are redirected when the Renew button is clicked.
n) **Add Employee** – Drop-down. This setting refers to the tab to which users are redirected when the Add Employee button from the Group Action panel is clicked.

Note: This setting only applies to the Employee segment.

---

o) **Add Committee Member** – Drop-down. This setting refers to the tab to which users are redirected when the Add Employee button from the Group Action panel is clicked.

Note: This setting applies to only to the Committee segment.

---

p) If the "Display as group action" radio button is selected:

   i) **Print Roster** – Drop-down. This setting refers to the tab to which users are redirected when the Print Roster button is clicked.
   ii) **Send Email** – Drop-down. This setting refers to the tab to which users are redirected when the Send Email button is clicked.
   iii) **Buy Product** – Drop-down. This setting refers to the tab to which users are redirected when the Buy Product button is clicked.

q) If the "Display as group purchase confirmation" radio button is selected:

   i) **Buy another product for the same group** – Drop-down. This setting refers to the tab to which users are redirected when purchasing another product for their same group.
   ii) **Buy another product for different group** – Drop-down. This setting refers to the tab to which users are redirected when purchasing another product for another group.
   iii) **Proceed to cart** – Drop-down. This setting refers to the tab to which users are redirected when the Proceed to Cart button is clicked.
   iv) **Affiliate List in Group Purchase confirm mode** – Drop-down. This setting refers to the Committee Affiliate list tab (set in "Group Purchase mode) user will be redirected in the "Buy Product" workflow.

6) Click **Update**.

Configuring the Affiliate Management - Segment List Web Module

The Affiliate Segment List Web Module, offered in 7.2.1 and above, provides you with the ability to create a page that displays only the affiliate segments a user controls when the associated user is logged into the site.

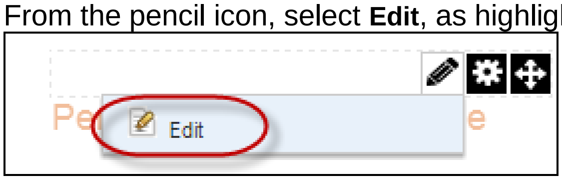
This page also serves as the Affiliate Management homepage from which point the user can purchase products on behalf of Affiliate Members or manage the segment group depending on the rights assigned to the user through the Organization Segmentation (ORG002) screen in the back office.

Create the Affiliate Segment List Page

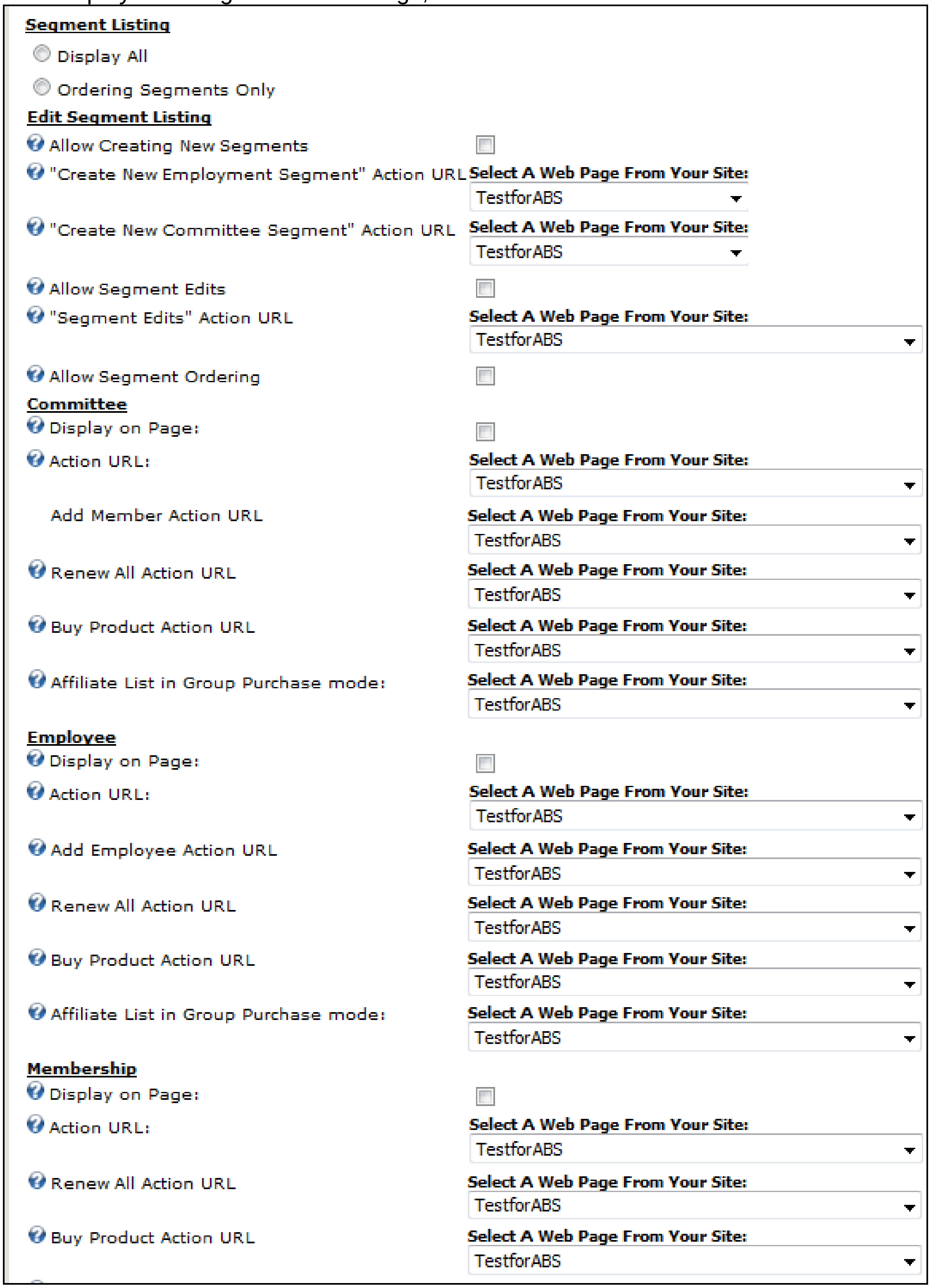
Note: You must create a new page before you can configure the Affiliate Segment List page. You can give the title page a unique name. For example, we titled our home page "Affiliate Management Home".

To create the configure the affiliate segment list page:

1) Log into your site as Host.
2) Navigate to the blank page you created.
3) Add the **Personify - Affiliate Segment List** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



This displays the Segment List settings, as shown below.



Configure the Segment List Settings

The sections below lists the various settings for the Affiliate Segment List Web Module and the impact each setting has on the customer experience. The Segment Listing section of the settings page displays two radio buttons that determine which segments the customer can see on this page.

Note: Customers will never be able to view any segments they are not granted rights to control from the Organization Segmentation (ORG002) screen in Personify360.

To create the page display setting:

1) Select the radio button that you want to be displayed on the screen:

   a) **Display All** – all segments the customer has rights to control display on the page, as shown below.

   b) **Ordering Segments Only** – only segments the customer has right to control AND are available for the customer to purchase products for display on the page, as shown below.

2) Click **Save**.

Configure the Edit Segment Listing Settings.

1) From the homepage, select Edit Segment Listing.

2) Choose which actions you want your customer to perform based on the configurations described below.

   a) **Allow Creating New Segments –** checkbox. When checked, this allows the user to create a new segment (employment or committee) if a system administrator has already provided the user rights to this action by way of ORG002 in Personify360. An "Add Segments" button displays on the screen when you activate this feature. Please refer to Affiliate Management Workflows for more information on enabling this button.
   b) **"Create New Employment Segment" Action URL** – drop-down. Only needed if you enabled the Allow Creating New Segments checkbox. The page you select determines what page the user is directed to. For example, if they click the Create New Employment Segment button after clicking the Add Segment button.

      Please refer to Affiliate Management Workflows for more information on enabling this button.
   c) **"Create New Committee Segment" Action URL** – drop-down. Only needed if you enabled the Allow Creating New Segments checkbox. The page you select determines what page the user is directed to. For example, if they click the Create New Committee Segment button after clicking the Add Segment button.

      Please refer to Affiliate Management Workflows for more information on enabling this button.
   d) **Allow Segment Edits** - checkbox. When checked, the segment name displays as a hyperlink, and, when checked by the user, allows the user to edit the segment's contact information if a system administrator has already provided the user rights to this action in the back office.
   e) **"Segment Edits" Action URL** – drop-down. Only needed if you enabled the Allow Segment Edits checkbox. The page you select determines what page the user is directed to. For example, if they click the segment name in order to edit the segment's contact or demographic information. You should direct them to a page that has the Customer Address, Customer Communication, and Alter Customer modules installed.
   f) **Allow Segment Ordering** – checkbox. When checked, a Buy Product link displays under each segment which allows the user to purchase products specifically for the segment. For the link to work, you must configure the Affiliate Management Buy Product workflow as discussed in Configure the Buy Product Workflow.

Configure the Committee/Employee/Membership/Miscellaneous/Geographic Settings

The sections for Committee, Employee, Membership, Miscellaneous, and Geographic list the same settings (with exception to Committee and Employee, as discussed below). These settings deal with displaying each type of segment and the action that occurs when a user clicks on any of the links under each segment.

- **Display on Page –** checkbox. When checked, this ensures that any segments of that specific type (committee, employee, etc.) in which the user has control over will display on the screen when the user is logged in.

Note: This option is provided so that associations may create multiple segment list pages if they want a separate page for each type of segment type.

- **Action URL –** drop-down. Only available when you set the Segment Listing Mode to Display All. The page you select determines which page the user is directed to when he/she clicks the List All link next to the segment. Make sure to select the page that includes the Personify – Affiliate List module for that specific segment type. For example, you may have created a page entitled Employee Affiliate List which uses the Affiliate List module.
- **Add Member/Employee Action URL –** drop-down. Only available when you set the Segment Listing Mode to Display All. This setting refers to the page to which the user is redirected when the user clicks the Add Member button for the associated segment.

  Please refer to Configure the New Committee Member Workflow for more information.
- **Renew All Action URL –** drop-down. This setting refers to the page to which the user is redirected when he/she clicks the Renew All button. This setting should point to the page where you installed the Personify – Renewable Products module.

  Please refer to “Configure the Renewable Products Workflow” for more information.
- **Buy Product Action URL –** drop-down. This setting refers to the tab to which the user is redirected when the “Buy Product” button is clicked.

  Please refer to Configure the Buy Product Workflow for more information.
- **Affiliate List in Group Purchase Mode –** drop-down. This setting refers to the Committee Affiliate list tab (set in “Group Purchase” mode). User will be redirected in the Buy Product workflow. .

Note: Please refer to Configure the Buy Product Workflow for more information.

Customer Impact

After setting up the Segment List Web Module, your customers will see the module as displayed below.

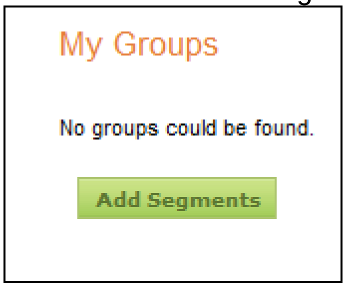
Configuring the Affiliate Management Workflows

This section explains how to configure the following affiliate management workflows:

- New segments
- New committee member
- Renewable products
- Buy product

Configuring the Create New Segments Workflow

Completing configuration of the Create New Segments workflow displays and enables the Create Employment Segment and Create Committee segment buttons. Click **Add Segments** from the Affiliate Management Homepage to access these buttons, as shown below.



Note: If you have enabled users with the ability to create new segments via the “Allow Creating New Segments” checkbox on the Affiliate Segment List settings page, as discussed in Configuring the Affiliate Management - Segment List Web Module, and a user has been assigned the right to create new segments via the Organization Segmentation (ORG002) screen in the back office, then you must create and configure additional pages to complete the workflow.

To configure the Create New Segments workflow:

1) Create a new page entitled “Create New Employment Segment”.

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, "Create New Employment Segment".

2) Install the **Customer Registration** module to this page.
3) Select **Edit Customer Registration Settings**.
   The edit settings page displays, as shown below.

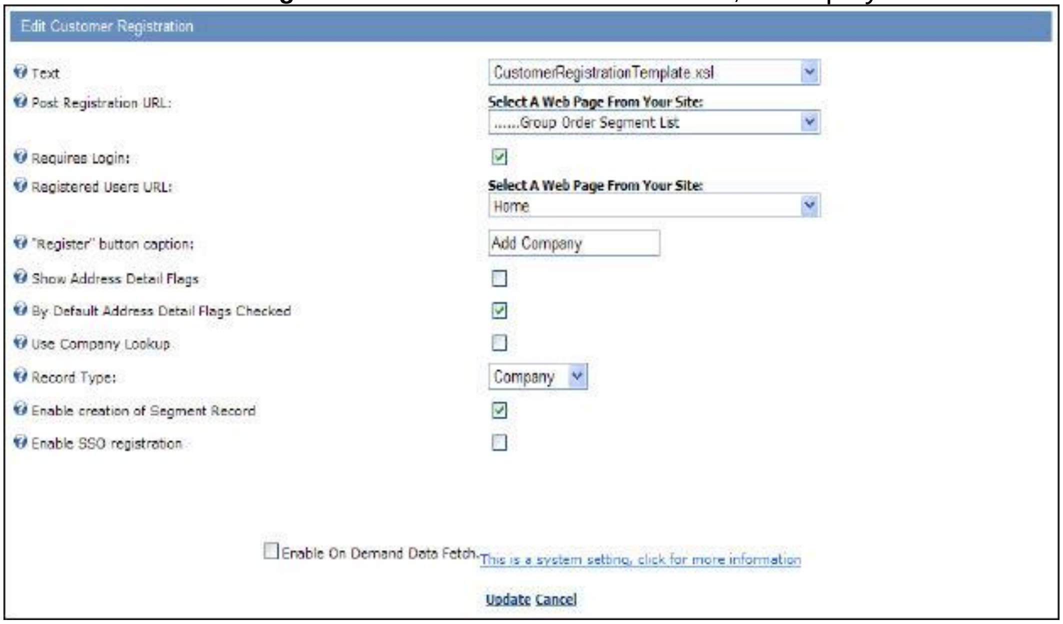
4) Configure the following settings:

   a) **Text**: select “CustomerRegistrationTemplate.xsl” from the drop-down menu.

Note: If your association created its own version of this template, make sure to select your customized template instead.

   b) **Post Registration URL**: select the desired page you want to direct users to after they complete the registration. It should also have the Affiliate Management Segment Listing module installed on it. For example, the Affiliate Management Homepage as discussed in Affiliate Management - Segment List Web Module.
   c) **Requires Login**: check the checkbox to enable.
   d) **“Register” button caption**: enter the text you want to appear on the button at the bottom of the Create New Employment Segment page. For example, “Add Company” (since this registration page is for creating new employment segments).
   e) **Record Type**: select “Company” from the drop-down menu.

f) **Enable Creation of Segment Record**: check the checkbox, as displayed below.



Note: Refer to [Configuring the Customer Registration Web Module]() for additional configuration settings.

---

5) Click **Update**.

6) Create another page entitled “Create New Committee Segment”.

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, "Create New Committee Segment".

---

7) Install the Customer Registration module.

8) Select Edit Customer Registration Settings.
The edit settings page displays.

9) Configure the following settings, as shown below:

a) **Text**: select “CustomerRegistrationTemplate.xsl” from the drop-down menu.

Note: If your association created its own version of this template, make sure to select your customized template instead.

---

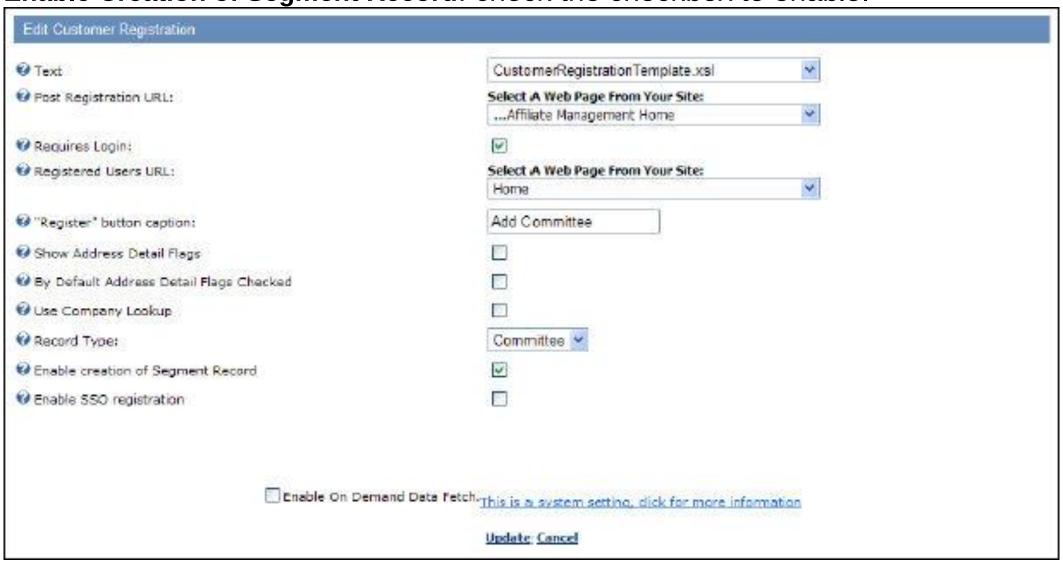
b) **Post Registration URL**: select the desired page you want to direct users to after they complete the registration that also has the Affiliate Management Segment Listing module installed on it. For example, the Affiliate Management Homepage as discussed in Affiliate Management - Segment List Web Module.

c) **Requires Login**: check the checkbox to enable.

d) **“Register” button caption**: enter the text you want to appear on the button at the bottom of the Create New Employment Segment page. For example, “Add Committee” (since this registration page is for creating new committee segments).

e) **Record Type**: select “Committee” from the drop-down menu.

f) **Enable Creation of Segment Record**: check the checkbox to enable.



Note: Refer to Configuring the Customer Registration Web Module for additional configuration settings.

10) Click **Update**.
11) Navigate to your **Affiliate Management Homepage** and select **Edit Affiliate Segment List Settings**.
12) From the **Create New Employment Segment** drop-down menu, select the first page you created for this workflow.
    For example, Create New Employment Segment.
13) From the **Create New Committee Segment** drop-down menu, select the second page you created for this workflow. .
    For example, Create New Committee Segment.
14) Click **Update**.

Configuring the New Committee Member Workflow

If a user is assigned the right to add a committee member to a committee segment, then you need to create and configure additional pages to complete the New Committee Member workflow.

To configure the New Committee Member workflow:

1) Create a new page entitled “Create New Committee Member”.

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, “Create New Committee Member”.

2) Install the Customer Registration module to this page.

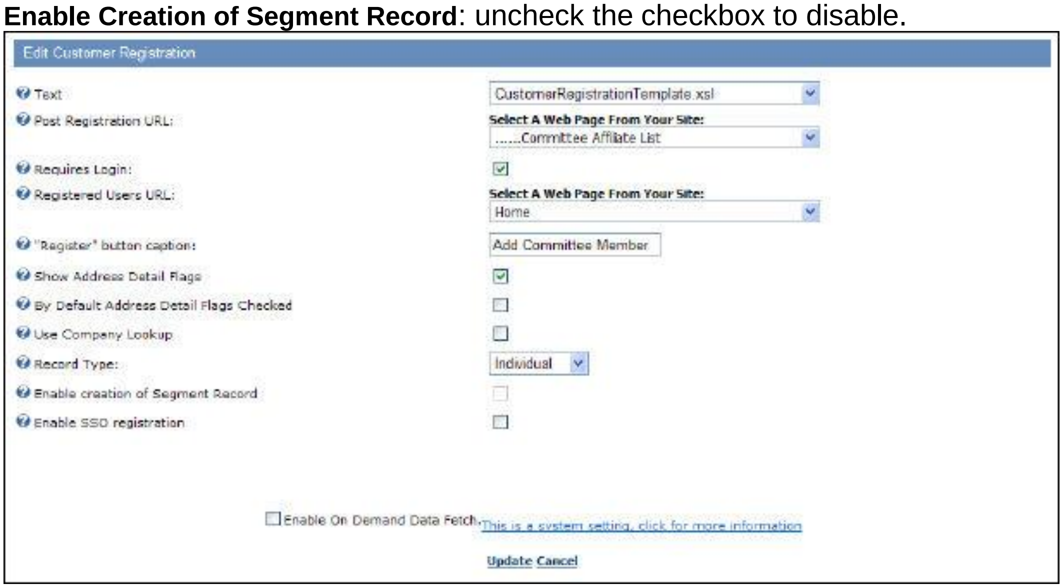
3) Select Edit Customer Registration Settings.
The edit settings page displays.

4) Configure the following settings, as shown below:

a) **Text**: select “CustomerRegistrationTemplate.xsl” from the drop-down menu.

Note: If your association created its own version of this template, make sure to select your customized template instead.

b) **Post Registration URL**: select the desired page you want to direct users to after they complete the registration that also has the Affiliate Management Segment Listing module installed on it. For example, the Affiliate Management Homepage as discussed in Affiliate Management - Segment List Web Module.
c) **Requires Login**: check the checkbox to enable.
d) **“Register” button caption**: enter the text you want to appear on the button at the bottom of the Create New Employment Segment page. For example, “Add Committee Member” (since this registration page is for creating new employment segments).
e) **Record Type**: select “Individual” from the drop-down menu.
f) **Enable Creation of Segment Record**: uncheck the checkbox to disable.



Note: Refer to Configuring the Customer Registration Web Module for additional configuration settings.

5) Click **Update**.

6) Create another page entitled "Committee Member Search."

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, "Committee Member Management" to avoid confusion.

7) Install the Dynamic Search module.

8) Select Edit Dynamic Search.
The edit settings page displays.

9) Check the **Redirect to dynamic search detail via link** checkbox.

10) Configure any other settings you desire.

11) Click **Update**.

12) Create a third page entitled "Committee Member Management".

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, "Committee Member Management" to avoid confusion.

13) Install **Personify – Committee Member** module.
14) Select **Edit Committee Member Settings**.
The edit settings page displays, as shown below.

15) Select the desired radio button from the following options:

a) **New Only**: Users only have the ability to add a committee member to the segment that is entirely new to the system.
b) **Search Only**: Users only have the ability to add a committee member to the segment that is already entered in the system.
c) **Both**: Users have the ability to add a committee member to the segment by adding a new customer to the system or searching for an existing one.

16) From the **Action URL for "New"** drop-down menu, select the first page you created in this workflow.
For example, Create New Committee Member.
17) From the **Action URL for "Search"** drop-down menu, select the second page you created in this workflow.
For example, Committee Member Search.
18) Click **Update**.

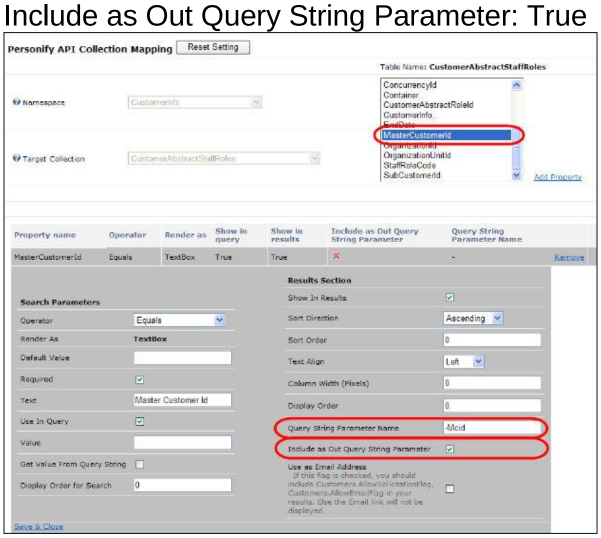
19) Navigate back to the second page you created in this workflow.
For example, Committee Member Search.

20) Open the **Dynamic Search** module for editing.
21) From the **Dynamic Search** drop-down menu, select the third page you created in this workflow.
For example, Committee Member Management.

22) Make sure you include the following search parameters, as highlighted below:

a) Table Name: SubCustomerId
Query String ParameterName: Scid
Include as Out Query String Parameter: True

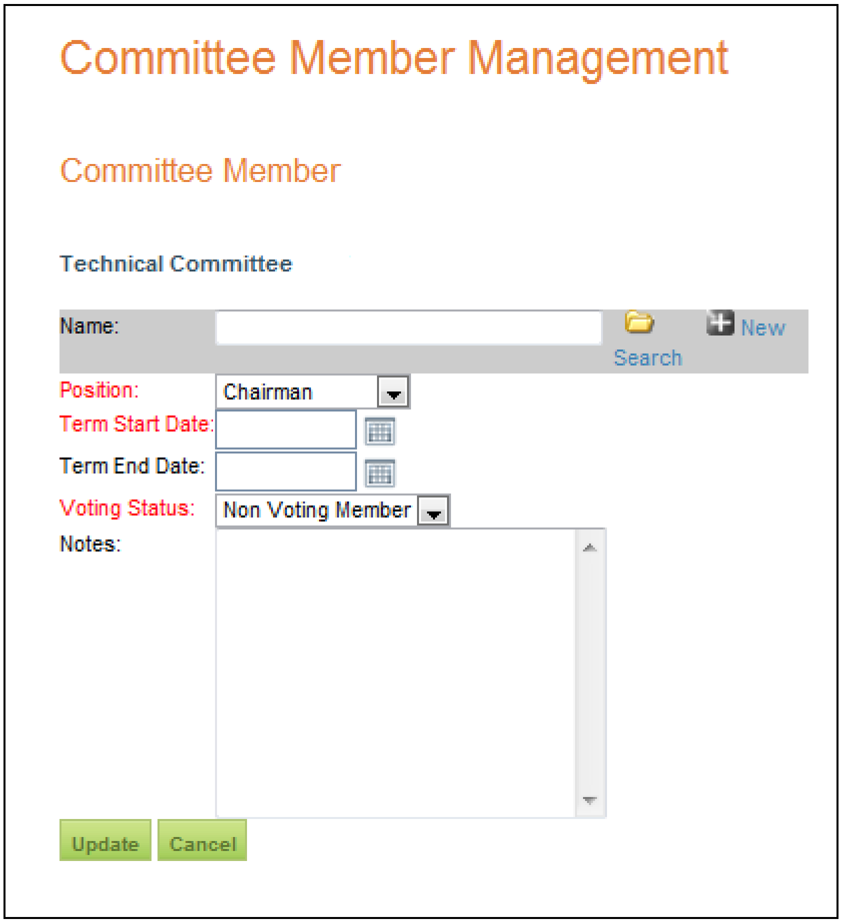
b) Table Name: MasterCustomerID
Query String ParameterName: Mcid
Include as Out Query String Parameter: True



23) Click **Update**.

Customer Impact

After setting up the New Committee member workflow, when a user selects "Add Member", he/she is directed to the Committee Member Management page, as shown below. This page gives the Affiliate Manager the option of searching for an existing customer or adding a new customer.



Configuring the Renewable Products Workflow

In order to give users access to renew product for a particular segment (i.e., inventoried products or memberships), you need to do the following:

(1) Create an additional page,

(2) Configure the new page,

(3) Configure the Affiliate Segment List Homepage.

To configure the Renewable Products workflow:

1) Create a page entitled “Pay Renewables”.

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, “Pay Renewables”.

---

2) Install the PayOrders module.

3) Select **Edit PayOrders**.
The edit settings page displays.

4) Configure the following settings, as shown below:

   a) **PayOrders Mode**: Pay Renewals,
   b) **PayOrders Template**: PayRenewals.xsl,
   c) **Credit Card Template**: CreditCardwithoutCVV2.xsl,
   d) **Electronic Check Template**: ECheck.xsl,
   e) **Enable Electronic Check**: False,
   f) **Action URL**: select the page with the OrderSummary module installed on it.

5) Click **Update**.

6) Create another page entitled “Renewable Products”.

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, “Renewable Products”.

---

7) Install the **Personify – Renewable Products** module to this page.

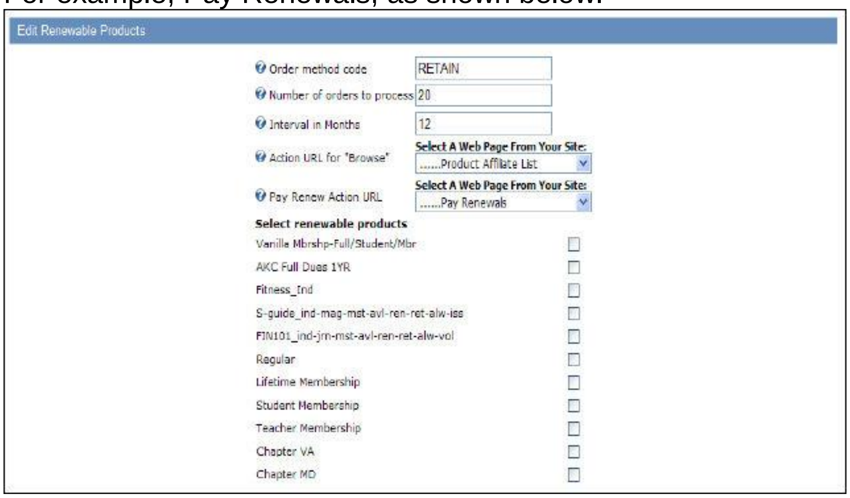
8) Select the option to Edit Personify – Renewable Products Settings on this page.
The edit settings page displays.

9) Configure the following settings:

   a) **Order Method Code**: enter RETAIN
   b) **Number of Orders to Process**: enter the number of renewal orders that you want users to be able to create for the entire group.

Note: Creating renewal is a performance intensive process. Personify recommends you refrain from allowing users to create more than 20 orders at a time.

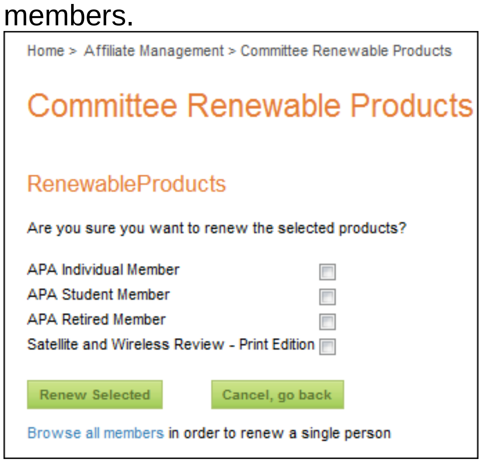
c) **Interval in Months**: enter the number of months in the future you want the system to search for products that can be renewed. The system will only allow users to renew products that will expire at some point within the amount of months you specified.
d) **Action URL for Browse**: elect the page which has products and the Personify – Affiliate List module installed on it.
e) **Pay Renew Action URL**: select the page which has the Pay Orders module installed on it and is associated with Renewable Products.
For example, Pay Renewals, as shown below.



10) Click **Update**.

Customer Impact

After setting up the Renewable Products workflow, when a user selects "Renew All", he/she is directed to the Committee Renewable Products page, as shown below. This page gives the Affiliate Manager the option of renewing selected products for his/her whole group or selected members.



Configuring the Buy Product Workflow

Offered in the 7.2.1 package and above, to set up the Buy Product Workflow for Affiliate Management, you must have installed all of the following modules:

- Personify – Affiliate Segment List
- Personify – Affiliate List
- Personify – Product Listing
- Personify – Product Detail
- Personify – Shopping Cart

You use these modules to create pages that guide users through the workflow necessary to buy products for affiliate groups. The steps described below detail the specific settings necessary to create this workflow.

The configuration of this workflow involves the creation of six pages that include the modules listed above. Below is a list the pages you will create (the page names are only examples for the purposes of this section, you can name them whatever you desire), the required module for each page, and the order in which you will create them when configuring this workflow. This list serves as a quick reference to use while configuring the workflow.

- Affiliate Product Shopping Cart
  module: Personify – Shopping Cart
- Affiliate Group Purchase Confirmation
  module: Personify – Affiliate List
- Affiliate Group Purchase Action
  module: Personify – Affiliate List
- Affiliate List Group Purchase Action
  module: Personify – Affiliate List
- Affiliate Product Detail
  module: Personify – Product Detail
- Affiliate Product Listing
  module: Personify – Product Listing

Note: For this workflow, you will also use the Affiliate Management page you created in Affiliate Management - Segment List Web Module that includes the Personify – Affiliate Segment List Module. For the purposes of this section, the page is entitled, “Affiliate Management Home”.

Note: This section assumes you have worked with web modules and created e-Business webpages with the modules before. For more information on creating e-Business webpages with modules, please refer to Working with Pages and Adding a Web Module to the Webpage.

To configure the Affiliate Management Buy Product workflow:

1) Create a page entitled “Affiliate Product Shopping Cart”.

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, “Affiliate Product Shopping Cart”.

2) Install the Personify – Shopping Cart module to this page.

3) Configure any settings as you desire.
There are no required settings specific to Affiliate Management.

4) Click **Update**.

5) Create a second page entitled “Affiliate Group Purchase Confirmation”.

Note: You can name this page anything you desire, however, for the purposes of this section, we have named it as such to avoid confusion.

6) Install Personify – Affiliate List.

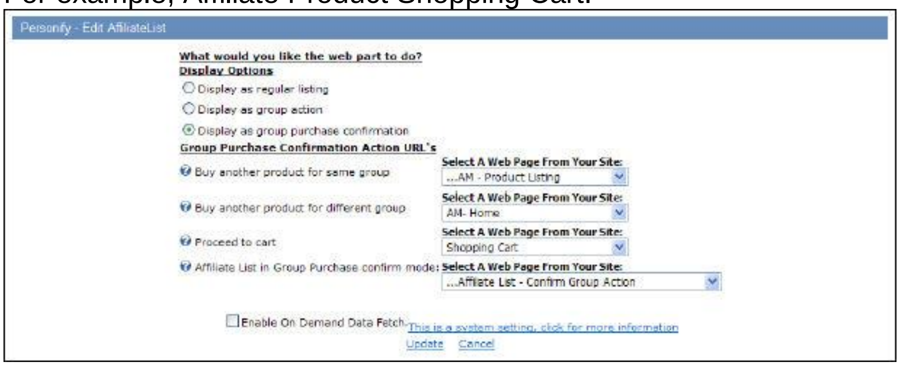
7) Select **Edit Personify – Affiliate List Setting**.
The edit settings page displays.

8) Configure the following settings:

   a) Display as Group Purchase Confirmation: select this radio button.

   b) Buy another product for different group: select the page you created in Affiliate Management - Segment List Web Module that includes the Personify – Affiliate Segment List Module.
   For example, Affiliate Management Home.

   c) Proceed to Cart: select the first page you created in this workflow that includes the Personify – Shopping Cart module.
   For example, Affiliate Product Shopping Cart.



Note: Refer to Configuring the Customer Registration Web Module for additional configuration settings.

9) Click **Update**.

10) Create a third page entitled “Affiliate Group Purchase Action".

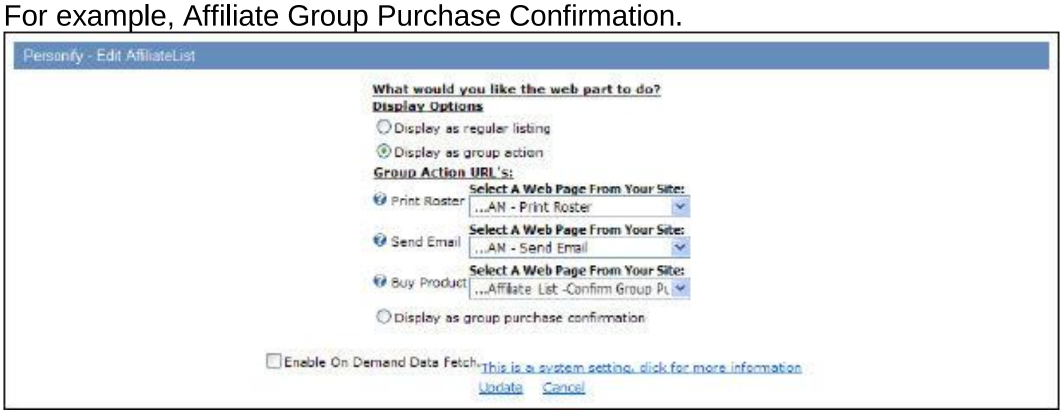
Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, "Affiliate Group Purchase Action”.

11) Install the Personify – Affiliate List module to this page.

12) Select the option to Edit Personify – Affiliate List Settings on this page.
The edit settings page displays.

13) Configure the following settings:

a) **Display as Group Action**: select this radio button.
b) **Buy Product URL**: select the second page you created in this workflow.
For example, Affiliate Group Purchase Confirmation.



14) Configure any other settings as you desire.

15) Click **Update**.

16) Create a fourth page entitled, “Affiliate List Group Purchase Action".

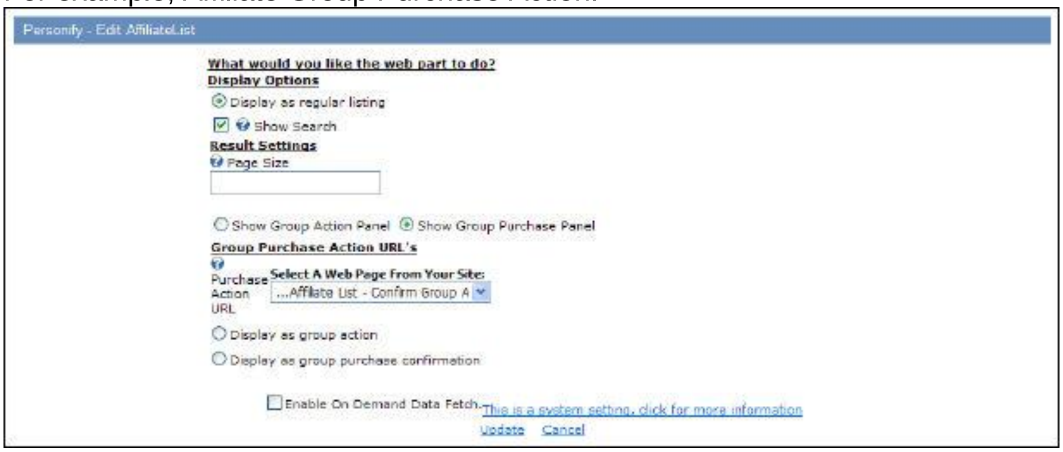
Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, "Affiliate List Group Purchase Action”.

17) Install the Personify – Affiliate List module to this page.

18) Select **Edit Personify – Affiliate List Settings**.
The edit settings page displays.

19) Configure the following settings, as shown below:

   a) **Display as Regular Listing**: select this radio button.
   b) **Show Search**: check/uncheck as desired.
   c) **Show Group Purchase Panel**: select this radio button.
   d) **Purchase Action URL**: select the third page you created in this workflow. For example, Affiliate Group Purchase Action.



20) Configure any other settings as you desire.

21) Click **Update**.

22) Create a fifth page entitled “Affiliate Product Detail.”

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, “Affiliate Product Detail”.

---

23) Install **Personify – Product Detail** module.
24) Select **Edit Personify – Product Detail Settings**.
    The edit settings page displays.

25) Configure the following settings:

   a) **Add to Cart**: FALSE,
   b) **Add to Wish List**: FALSE,
   c) **Buy For Group**: TRUE,
   d) **Group Purchase Action URL**: select the fourth page you created in this workflow. For example, Affiliate List Group Purchase Action.

26) Configure any other settings as you desire.

27) Click **Update**.

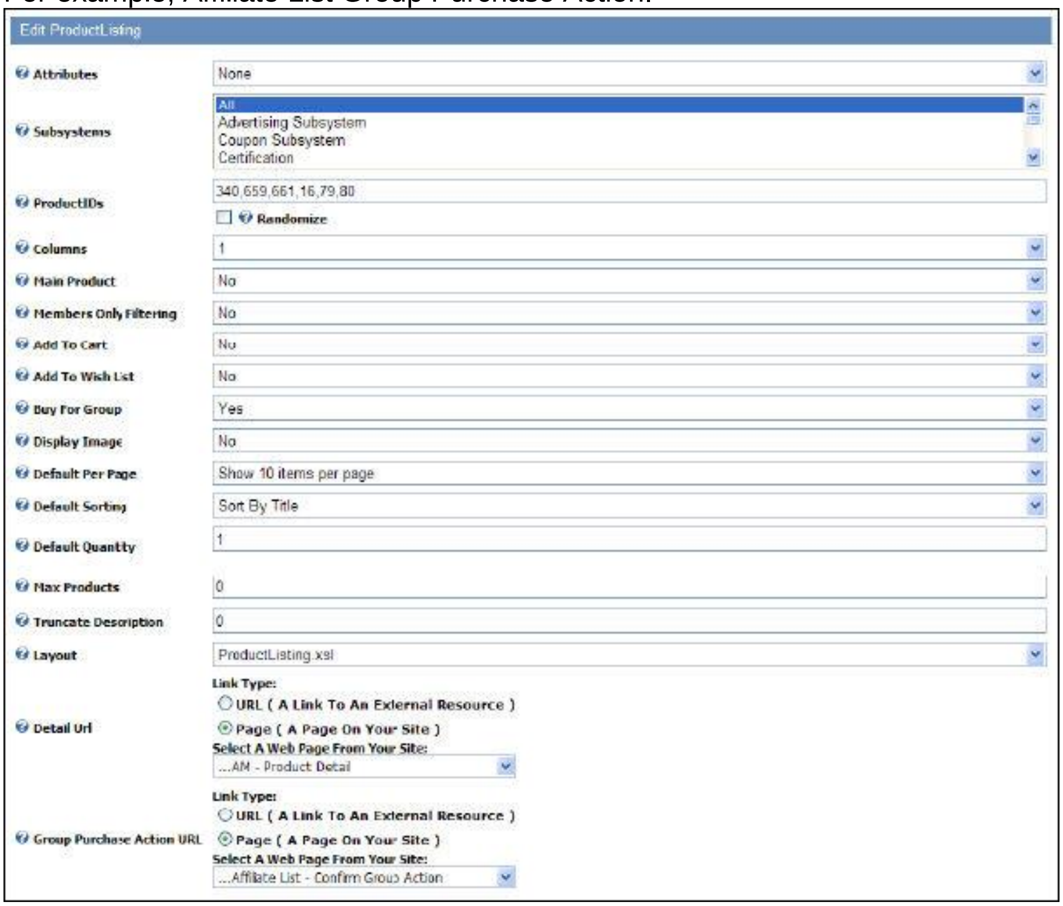
28) Create a sixth page entitled, “Affiliate Product Listing.”

Note: You can name this page anything you desire. For the purposes of this section, the page is entitled, “Affiliate Product Listing”.

29) Install **Personify – Product Listing** module.
30) Select **Edit Personify – Product Listing Settings**.
    The edit settings page displays.

31) Configure the following settings, as shown below:

    a) **Add to Cart**: FALSE,
    b) **Add to Wish List**: FALSE,
    c) **Buy For Group**: TRUE,
    d) **Detail URL**: select the fifth page you created in this workflow.
       For example, Affiliate Product Detail.
    e) **Group Purchase Action URL**: select the fourth page you created in this workflow.
       For example, Affiliate List Group Purchase Action.



32) Configure any other settings as you desire.

33) Click **Update**.

34) Navigate back to the third page you created in this workflow.
For example, Affiliate Group Purchase Confirmation.

35) Open **Personify – Affiliate List** module for editing.

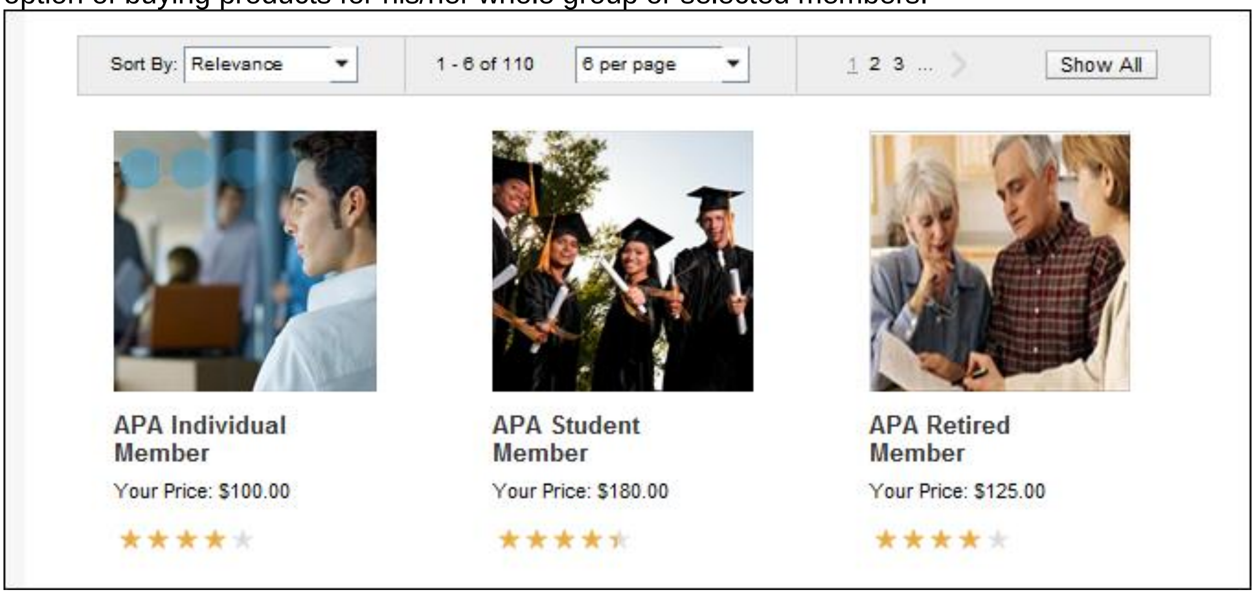
36) From the **Affiliate List in Group Purchase Confirm Mode** drop-down menu, select the fourth page you created in this workflow.
For example, Affiliate List Group Purchase Action.

37) From the **Buy Another Product for same group** drop-down menu, select the fifth page you created in this workflow and it should include the **Personify – Product Detail** module.
For example, Affiliate Product Detail.

38) Click **Update**.

Customer Impact

After setting up the Buy Products work flow, when a user selects "Buy Product", he/she is directed to the Product Listing Page, as shown below. This page gives the Affiliate Manager the option of buying products for his/her whole group or selected members.



Note: As of 7.4.2, Affiliate Management now works with the .NET control for the new online store (see Configuring the Affiliate Management .NET Control for more information).

Configuring the Employee Relationship Web Module

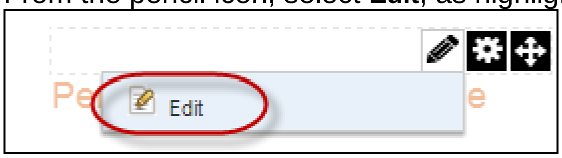
The Employee Relationship modules allows users to edit or view employment relationship details. This module is typically only used with Affiliate Management.

To configure the Employee Relationship web module:

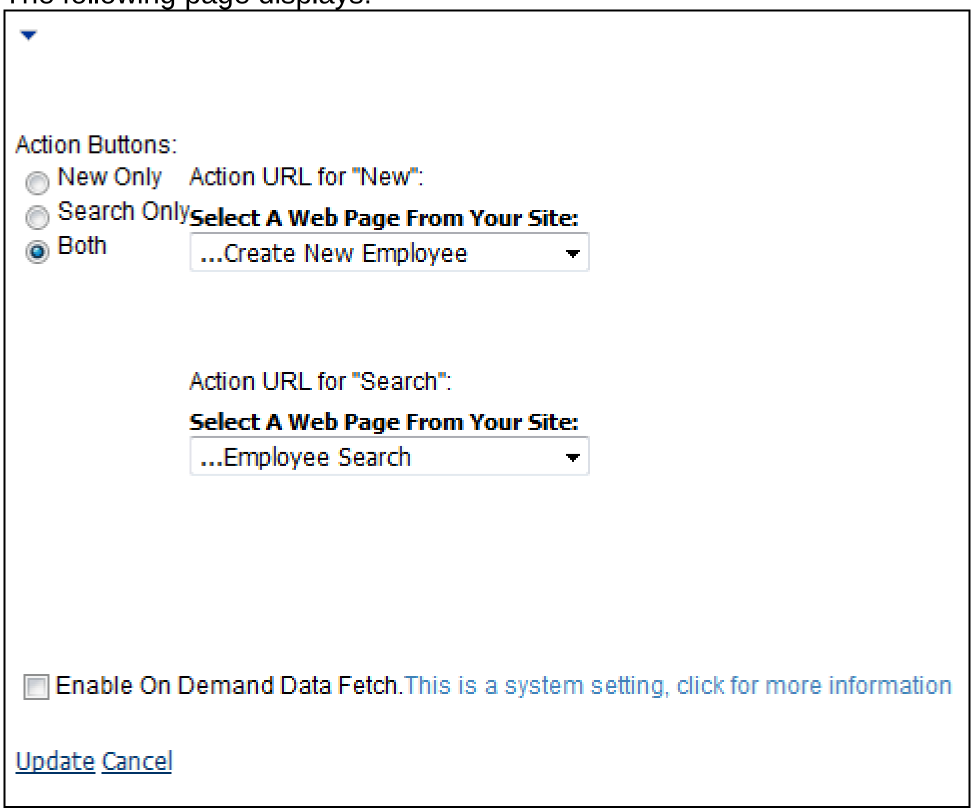
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Employee Relationship web module.

3) Add the **Personify – Employee Relationship** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



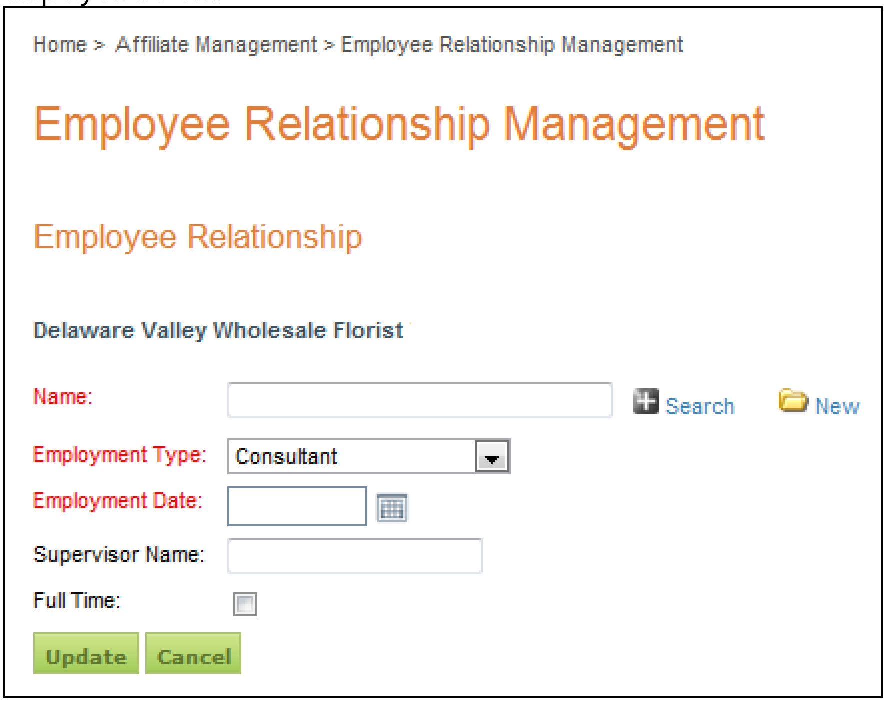
5) Configure the appropriate module settings as described below:

   a) **New Only** - Radio button/drop-down. This setting allows you to determine the page to which the user is redirected when the New button is clicked.
   b) **Search Only** - Radio button/drop-down. This setting allows you to determine the page to which the user is redirected when the Search button is clicked.
   c) **Both** - Radio button. This setting allows you to determine the pages the user is redirected to for both the New and Search buttons.

6) Click **Update**.

Customer Impact

After setting up the Employee Relationship web module, your customers will see the module as displayed below.



Configuring the Committee Member Web Module

The Committee Member web module is similar to the Employee Relations web module. It allows you to see or edit committee membership information. The Committee Member web module has three radio buttons from which to choose. These let you determine how the web module appears.

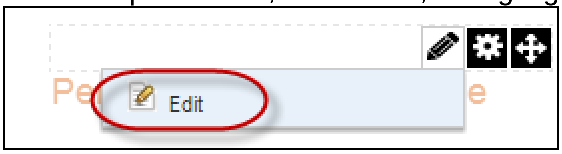
To configure the Committee Member web module:

1) Log into your site as Host.

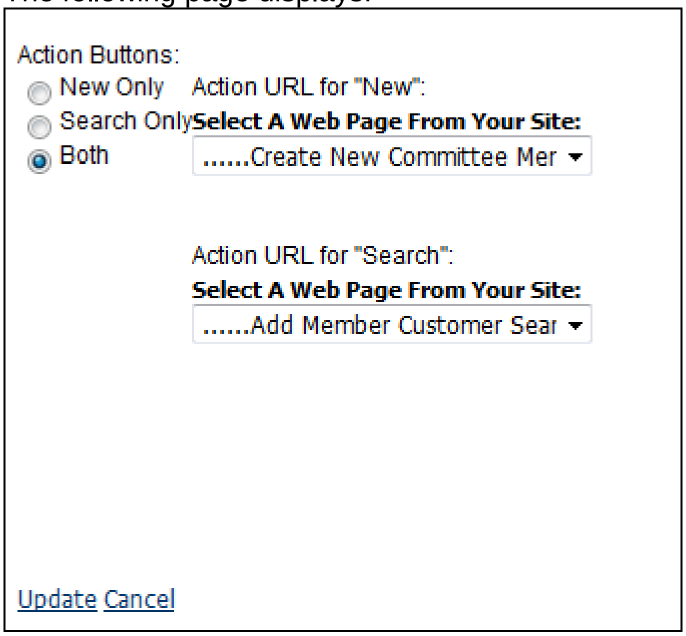
2) Navigate to the appropriate page on your site where you want to add the Committee Member web module.

3) Add the **Personify – Committee Member** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.

4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:



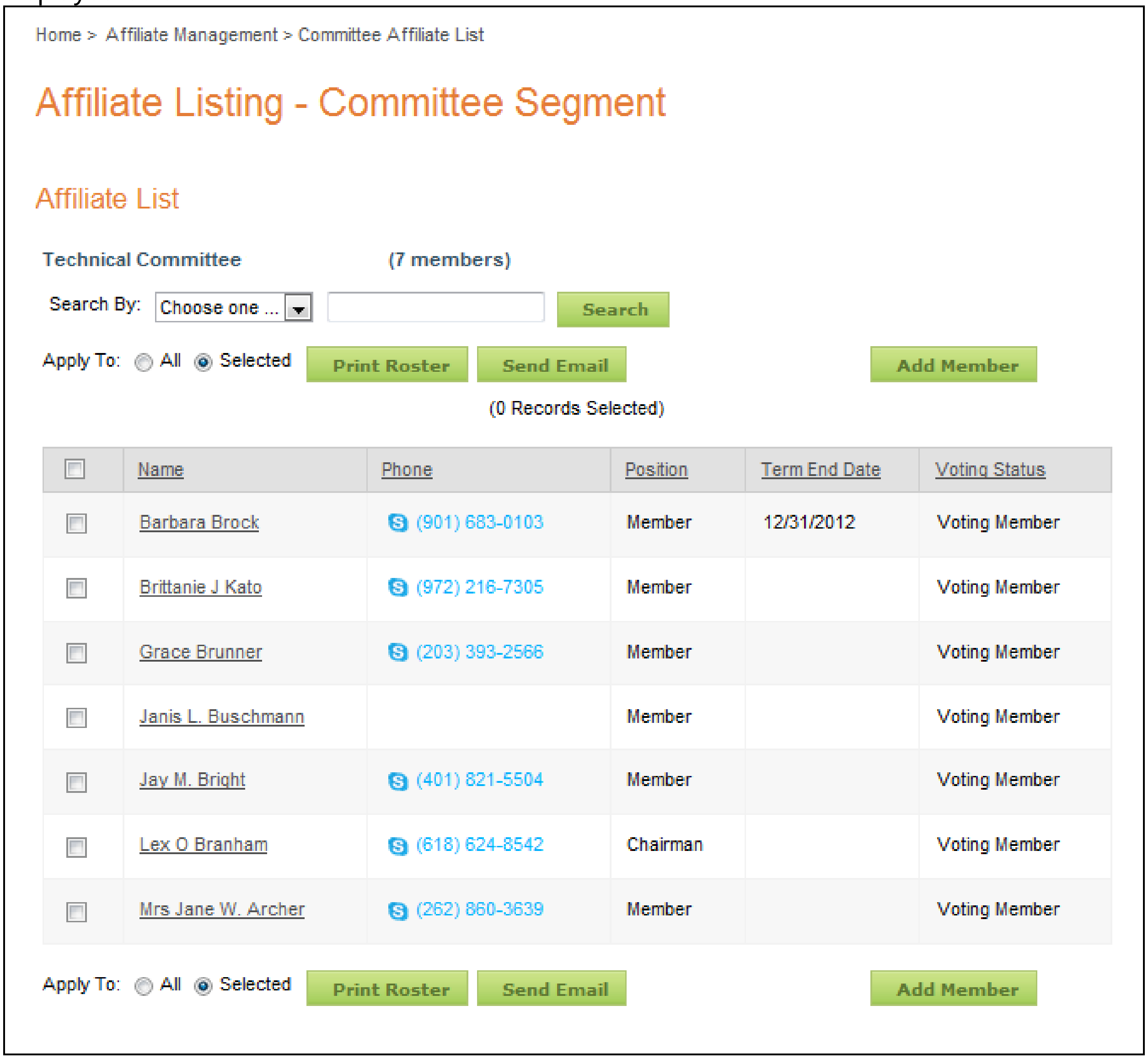
5) Configure the appropriate module settings as described below:

   a) **New Only –** Radio button. This setting lets you set the page to which the user is redirected when the New button is clicked. Select the page that allows you to create a new committee member.
   b) **Search Only** – Radio button. This setting lets you set the page to which the user is redirected when the Search button is clicked. Select the page that allows you to search for a committee member.
   c) **Both –** Radio button. This setting lets you set redirect pages for both the new and search buttons. An additional drop-down appears allowing you to select an additional page.

6) Click **Update**.

Customer Impact

After setting up the Committee Member web module, your customers will see the module as displayed below.


Home > Affiliate Management > Committee Affiliate List

Affiliate Listing - Committee Segment

Affiliate List

Technical Committee (7 members)

Search By: Choose one ... Search

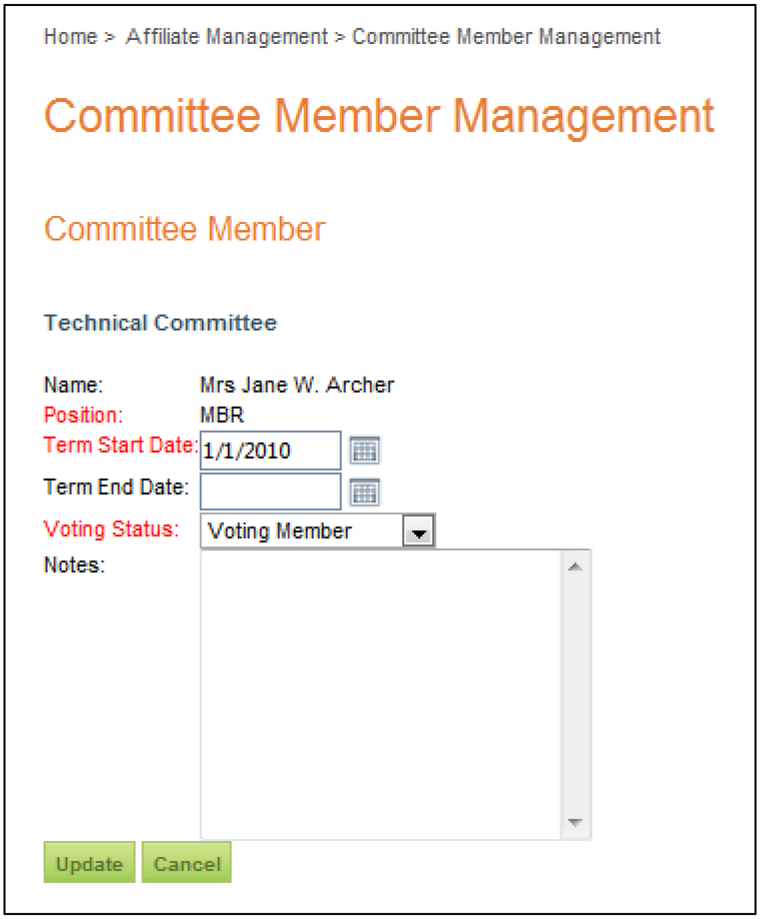
Apply To: All Selected Print Roster Send Email Add Member

(0 Records Selected)

	Name	Phone	Position	Term End Date	Voting Status
	Barbara Brock	(901) 683-0103	Member	12/31/2012	Voting Member
	Brittanie J Kato	(972) 216-7305	Member		Voting Member
	Grace Brunner	(203) 393-2566	Member		Voting Member
	Janis L. Buschmann		Member		Voting Member
	Jay M. Bright	(401) 821-5504	Member		Voting Member
	Lex O Branham	(618) 624-8542	Chairman		Voting Member
	Mrs Jane W. Archer	(262) 860-3639	Member		Voting Member

Apply To: All Selected Print Roster Send Email Add Member

When an Affiliate Manager edits a committee member's information, he/she will see it as shown below.



Configuring the Print Roster Web Module

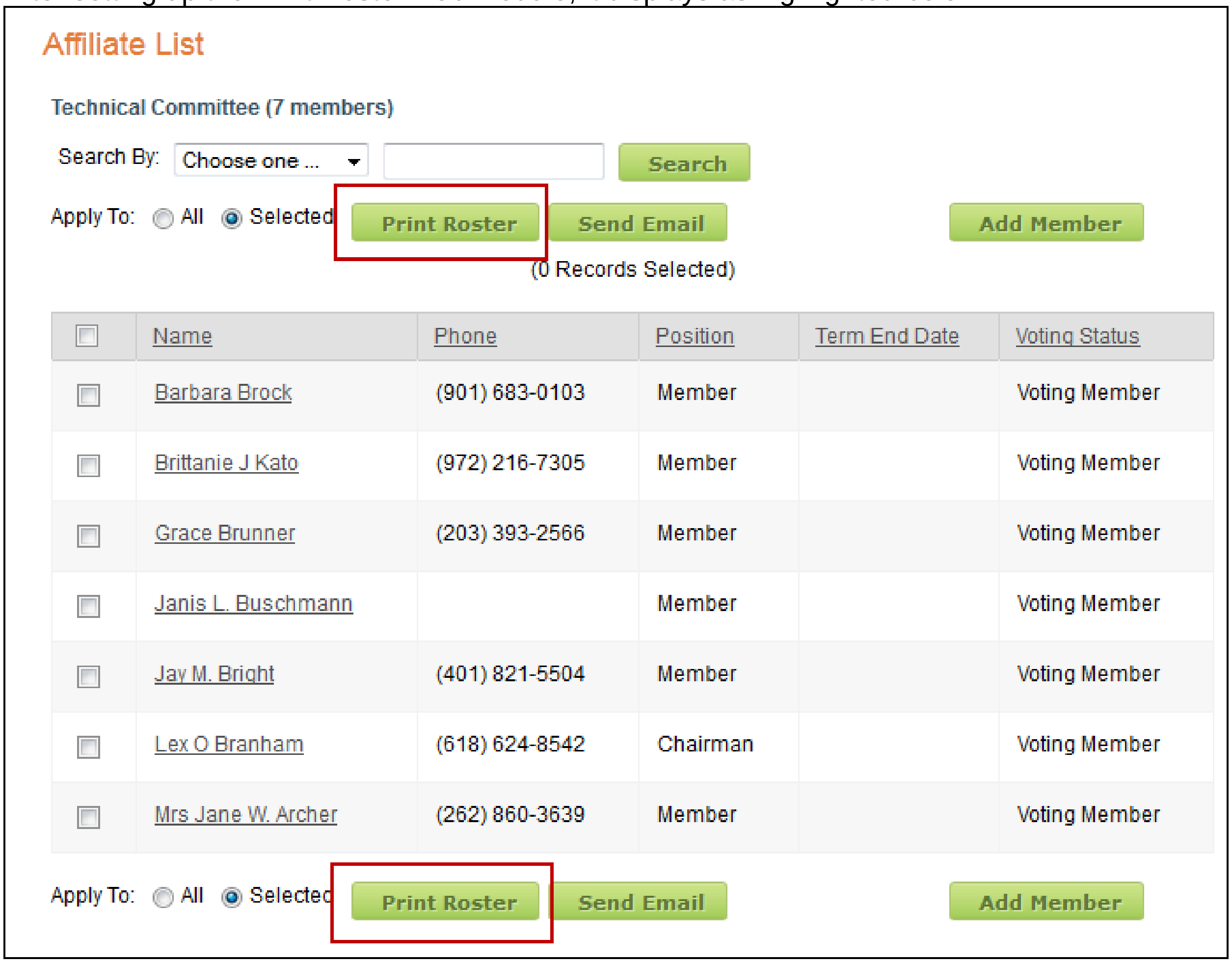
The Print Roster web module is helpful for printing the roster for an affiliate group.

There are no configuration requirements necessary for this web module once you have setup the Affiliate Management workflows (see Configuring Affiliate Management Workflows for more information).

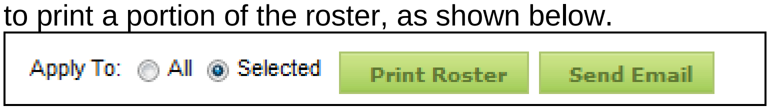
Note: The Print Roster pulls its data from the Cus_Segment_Control table (see CusSegmentControl for more information).

Customer Impact

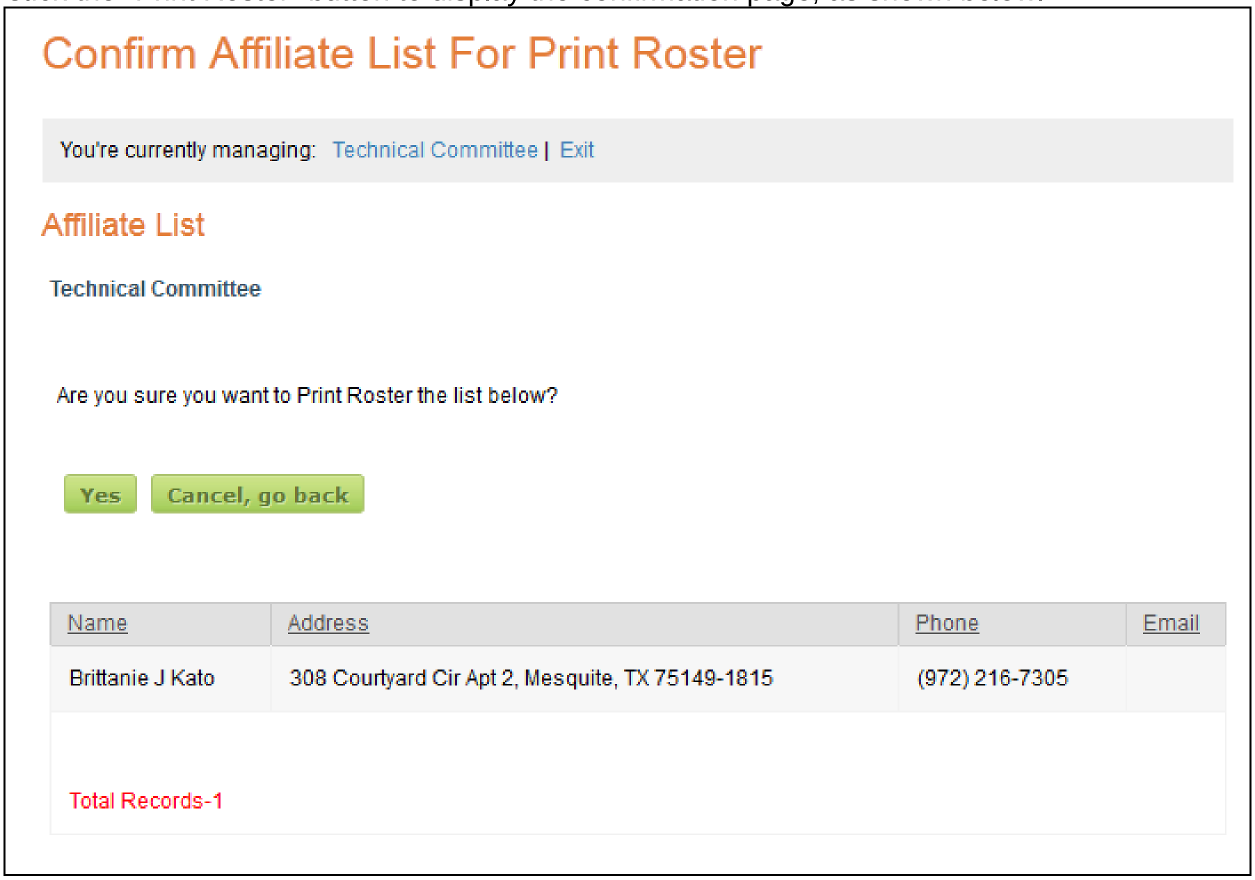
After setting up the Print Roster web module, it displays as highlighted below.



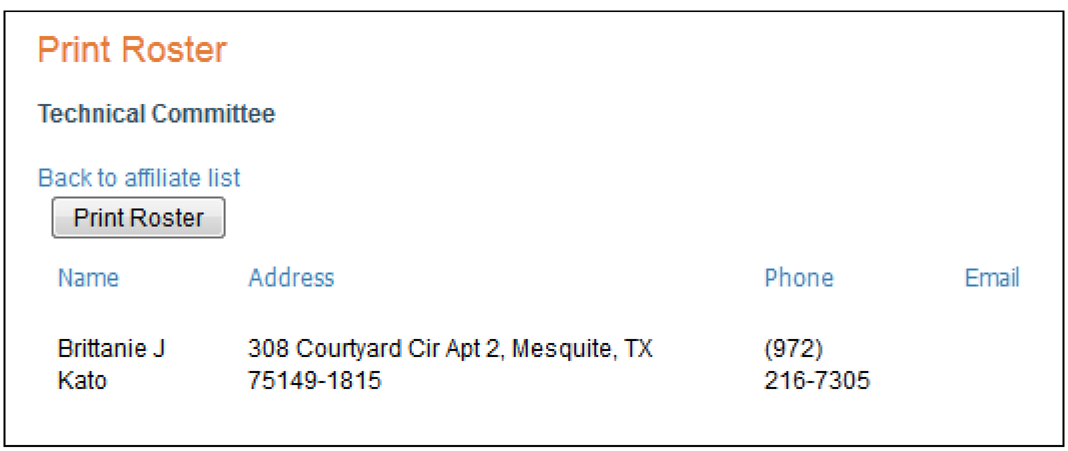
The user can select the "All" radio button to print the entire roster or the "Selected" radio button to print a portion of the roster, as shown below.



Click the "Print Roster" button to display the confirmation page, as shown below.



If you click "Yes", the Print Roster page displays, as shown below. If you click "Cancel, go back" you are directed to the Affiliate Listing-Committee Segment page.



Clicking "Print Roster" again sends the list to the printer.

Configuring the Email Web Module

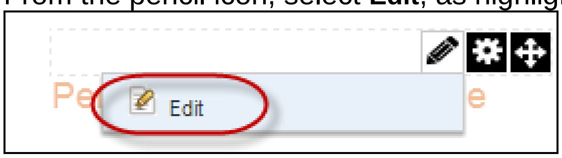
The Email web module is used in e-Business to allow users to send emails to customers or members in the database. This module is typically only used with Affiliate Management.

To configure the Email web module:

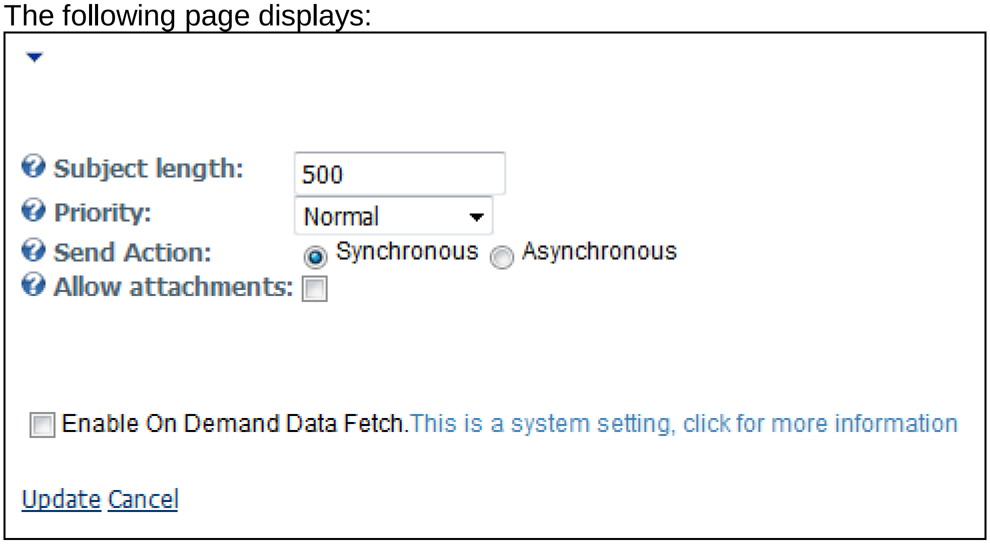
1) Log into your site as Host.

2) Navigate to the appropriate page on your site where you want to add the Email web module.

3) Add the **Personify – Email** module to where you want it to be located on your page. See Adding a Web Module to the Webpage for more information.
4) From the pencil icon, select **Edit**, as highlighted below.



The following page displays:

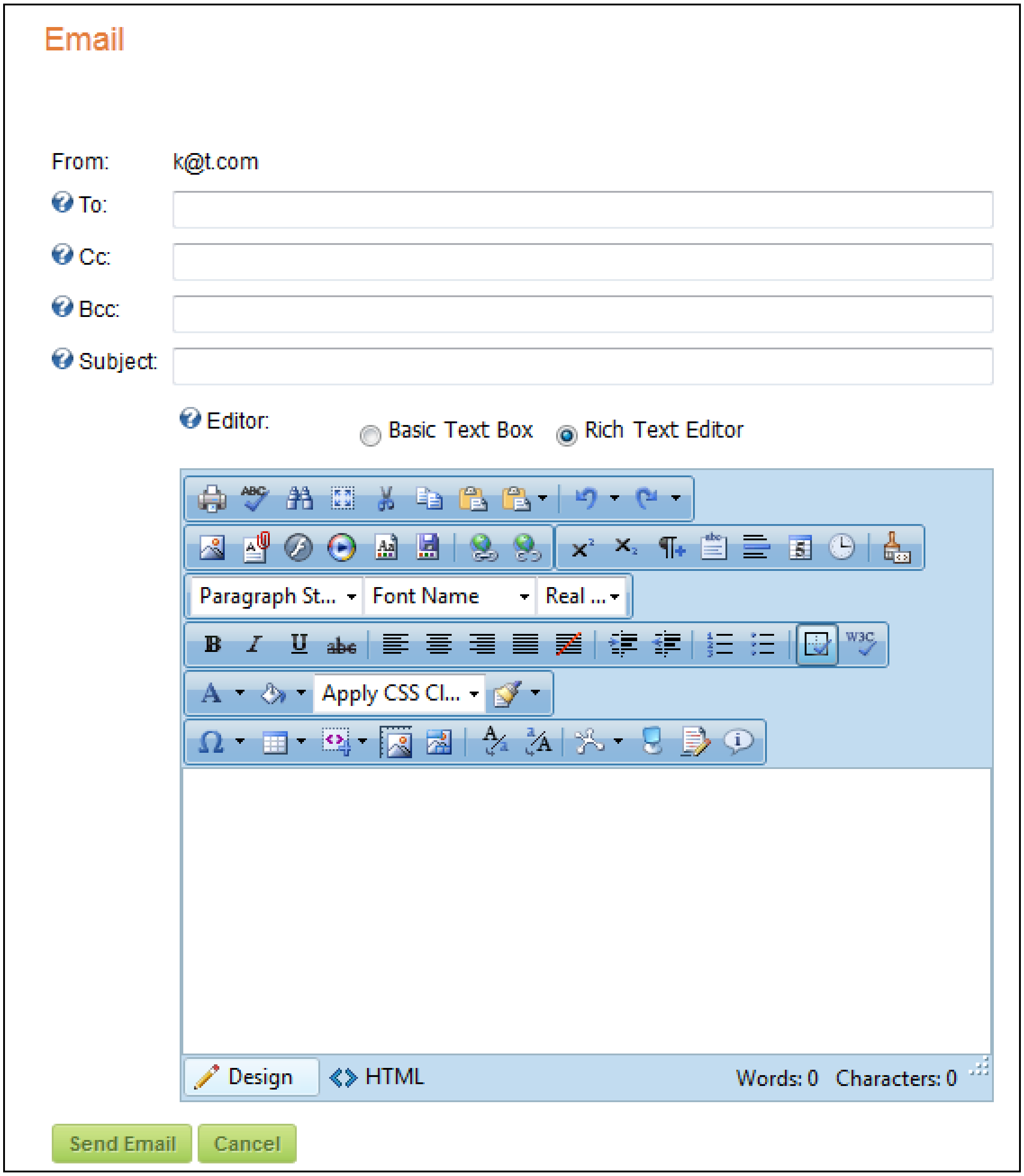


5) Configure the appropriate module settings as described below:

   a) **Subject Length** - Text box. This setting allows you to set the maximum number of characters allowed for the subject header.
   b) **Priority** - Drop-down. This setting allows you to set the importance of the importance of the outgoing email.
   c) **Send Action** - Radio button. This setting allows you to determine whether or not to use a synchronous or asynchronous connection when sending an email.
   d) **Allow Attachments** - Checkbox. When checked, this setting allows customers to add attachments to their emails
6) Click **Update**.

Customer Impact

After setting up the Email module, it may appear, as below, to your customer.



The customer's email address defaults as the "From" address and the customer has the option of using the Rich Text Editor or a Basic Text Box.