

Member Choice Club Set Up

We recommend that you watch the following webinar before beginning. You can start watching at minute 6:50 if you want to skip the reasons for and benefits of a Member Choice Club.

<https://www.youtube.com/watch?v=VsgG3H4UgN8&t=15s>

Then take the following steps to set up Member Choice Clubs in your Nexternal Order Management System (OMS).

A. Orders/Preferences/Pending Order Preferences: *please first read the ? tooltip* - then enter the following:

1. Singular & Plural Label fields → Insert **Member Choice Order(s)** or **Pending Club Order(s)** (we prefer pending club order – looks better in confirmation emails and is likely more intuitive to the club member)

2. Check the following boxes in that same section:

- ✓ Pending order checkbox: Allow for OMS only
- ✓ Allow edit
- ✓ Retain Navigation
- ✓ Lock Coupon
- ✓ Use Address Radio Buttons
- ✓ Allow activate

Order Preferences

Pending Order Preferences ?

Singular Label: Plural Label:

Pending Order Checkbox: Do not use Allow for OMS only Allow for customers of Rank or higher Auto Pending Perform Preauthorization

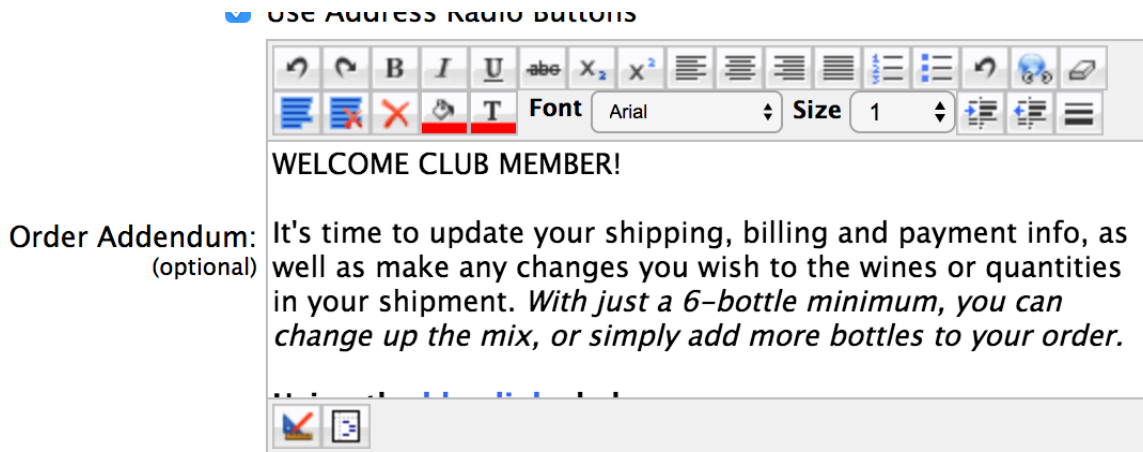
Description Link: (optional)

Description: (optional)

Allow Edit Retain Navigation Lock Coupon Allow Activate

Use Address Radio Buttons

3. Order Addendum field →



This is what the customer will see in their account when they log in to your online store to edit/update their orders after you've placed the orders and told them it's time to update – Basically, you want to clearly explain “how it works”

Think about your goals:

- Minimum bottles
- Minimum spend
- Suggest changes re: add-ons
- Check bill, ship, + payment info

Tell them how to update their orders –

Using links below:

1. [Confirm shipping, billing, + payment info](#)
2. [Change wines, add wines](#)
3. **PLEASE ACTIVATE WHEN FINISHED**

See the following as a guideline – obviously this needs to be tweaked to fit your own needs and requirements (and colors!) – example:

“WELCOME CLUB MEMBER!

It's time to update your shipping, billing and payment info, as well as make any changes you wish to the wines or quantities in your shipment. *With just a 6-bottle minimum, you can change up the mix, or simply add more bottles to your order.*

Using the **blue links** below:

1. confirm your shipping, billing and payment info
2. change wines & add more wine, if you wish (edit products)
3. **If you change/add wines & quantities, PLEASE ACTIVATE YOUR CLUB ORDER when you are done, for immediate fulfillment.**”

4. Under the Order Addendum Field: fill in the following boxes:

Retry Interval – 2 days

Auto cancel Interval – leave blank

Max Retries 10

You may want to uncheck Order Aggregation (read the ? tool tip so you can decide)

Auto Activate Interval: Days
(optional)

Retry Interval: Days

Allow Saved Credit Cards

Auto Cancel Interval: Days
(optional)

Maximum Retries:

Include in Order Aggregation

NOTE: It is imperative that you read the ? tooltips provided so that you know what all these things mean.

B. Placing Member Choice Club Orders -

1. Here is what you will need to have thought through, set up, and/or written ahead of time – before you begin to create your pending club orders:

- What your starting point wines are
- Auto activation date
- Minimum order price, if any
- Minimum order Qty, if any
- Certain wines must-takes?
- Certain add-ons excluded?
- Intended ship date?
- Pick up party?

When you place an order, you will want to send the order confirmation email and you will want to add comments in the comments field so your customers know what this is, and what to do –

- Here's what this is + here's how it works.
- Here's what will happen.
- Here's what you'll need to do.

C. BEFORE CREATING LIVE MEMBER CHOICE CLUB ORDERS – TEST, TEST, TEST

- Create a customer record for yourself and set yourself up as a club member.
- Place a pending order for yourself, and leave order confirmation email checked.
- Get, read, and evaluate the email
- Log into your online account as the customer
- Make changes to every part changeable – bill, ship, payment, order contents
- Early activate the order
- Get, read, and evaluate the email

(continued)

- As you test, make notes to refine language that is unclear
- Test again, and again, until you think it is crystal clear.
- Then maybe test it with a friend – someone who is not as close to it as you are – to see if THEY understand everything along the way.

Extra notes:

1. Inventory is NOT removed for pending orders

2. Think about sending an email to the club ahead of all this explaining how things will change and how they work – so these emails are not the first they see/hear of it.

3. In order for a product to be editable in a pending order, the “Pending Edit Eligible” box must be checked on page 1 of the product set up, and you must indicate that it is editable when placing the order.