

## Activating the Nexternal Age Gate

### What is the Age Gate?

Clients may set a minimum age required for customers to be able to purchase designated (or all) products in the online store. If the customer's stated date of birth does not meet the minimum age requirement for purchase, he/she is blocked from proceeding with the order.

*This feature is required for alcohol merchants using OpenEdge for payment processing, and it is recommended for all alcohol and other minimum-age-required product merchants even if OpenEdge is not being used.*

### How is the Age Gate Activated?

To activate this option:

1. Create a Customer Custom Field called Birth Date or Date of Birth (Customers / Custom Fields), and set it as shown in the image below (be sure these settings are correct or the feature won't work):

Field Name:   
(optional)

Field Type:  Text (Maximum 50 Characters)  
 Choose values from a select box  
 Positive Number  
 Positive Integer  
 Currency  
 Date  
 Yes/No

Field is Required  
 Expose to Customers  
 Allow Creation by Customers  
 Use to Identify

**Important Note:** Once you create this required field, the birthdate will be required even if the merchant opens a customer record from the OMS; no customer record can be modified until a birthdate is added. So, if you have a database in which no birthdates yet exist, you may wish to upload 1/1/1900 for all of your existing customers. Customers will

see this in their account, and can update them as they log in to place orders, or you can email them requesting that they update the birthdate.

If your database previously has had an optional birthdate field so you have some customers with a birthdate and others with no birthdate, then you may wish to upload 1/1/1900 for all of the customers who don't yet have a birthdate in their customer record.

2. In Settings / Edit Compatible Software / Alcoholic Beverage Tools (middle right of the page) / Preferences, please read the "?" tooltips carefully for each field to make your decisions about settings selections:

The screenshot shows the 'Alcoholic Beverage Tools Preferences' interface. At the top, the title 'Alcoholic Beverage Tools Preferences' is displayed. Below this, several settings are visible: 'Date of Birth Field' is set to a dropdown menu showing 'Customer Custom Field #1 (Birth date)'; 'Age to Verify' is set to a text input field containing '21' with '(optional)' below it; 'Denial Text' has two radio button options: 'Use Nexternal standard text' (which is selected) and 'Customize text'. Below the radio buttons is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, font color, background color, font face (set to Arial), font size (set to 1), bulleted list, numbered list, link, unlink, and help. Below the editor is a checkbox for 'Automatically deactivate denied customers'. At the bottom, 'Product Filtering' is set to a dropdown menu showing 'Verify For Restricted Products Only', and 'Location Filtering' is set to a dropdown menu showing 'Verify For United States Only'.

In General:

- a) Use the pulldown to map the "Date of Birth" field with the Customer Custom field set up in step one above. Pull it down from "(do not use)" to the birthday field reference. (Your field may have a different number and may have a different name than is shown in the image above.)
- b) In the "Age to Verify" field, enter the minimum age required to purchase products. (21 is shown as an example for alcohol, but you would enter whatever the minimum age is for the products you sell.)

- c) Use the "Product Filtering" box if you sell non-age-restricted products as well as age-restricted products. You may limit the scope of the age restriction to Restricted Products, Alcoholic Products, or All Products.
- The *Verify For All Products* option means all orders for all products will be included in the Age Gate age verification.
  - The *Verify For Restricted Products Only* option limits the use of the Age Gate birthdate verification to orders that contain at least one Restricted product.
  - The *Verify For Alcoholic Products Only* option limits the use of the Age Gate birthdate verification to orders that contain at least one product designated as Alcohol (Settings/Site Options in the Order Management System, subject to override on the product level).
- d) "Location Filtering" allows you to limit the location to which the restriction will be applied.
- e) If a customer does not meet the minimum age requirement you have indicated, you may customize the "Denial Text" which would be displayed to the customer. If you do not modify this, the default text will be used. The default text varies a bit by circumstance and settings, but could be as follows:
- "You must be at least 21 years old."
- ~ Or ~
- "You must be at least 21 years of age to purchase alcohol from [name of your business]. Based on the date of birth you have provided, it does not appear that you are at least 21 years old. Therefore, your order cannot be completed at this time."
- f) Finally, you may optionally "Automatically deactivate denied customers" by clicking the checkbox. This makes it more difficult for an underage person to attempt to purchase again, and prevents the underage person from being included in a Bulk E-Mail or mail campaign via the Mail Wizard (Customers/Mail Wizard).

However, this will also make it impossible for an "of age" customer who makes a data entry mistake on their birthday, to correct it and place an order using the same account.