
Community Builder Paid Subscriptions System

CBSubs™ Software Version 4.1



A Paid Membership Subscription system for



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The **C**ommunity **B**uilder (CB) Paid **S**ubscriptions system **CBSubs™** project is a commercial project supported by the following CB Core Team members:

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1 Introduction

This document describes the Community Builder (CB) Paid Subscriptions system - **CBSubs™ GPL**. **CBSubs™ GPL** is a set of CB plugins and CMS extensions (one module and a mambot¹) that create a powerful environment for commercial subscription-based activities surrounding CB and Joomla/Mambo.

As you will see, this **CBSubs™ GPL** version solution can transform any CB 2.14+ powered website into a clean, powerful and extremely versatile paid subscription-based services environment that also supports donation collections and merchandise offerings.

1.1 Assumptions – Prerequisites

The prerequisites needed to install and properly operate the Subscription system include:

- A Community Builder 2.14+ (www.joomlapolis.com) powered website. CB 2.0.14 or above is needed for **CBSubs™ GPL 4.1**. At the publication time of this manual **CB 2.0.14** was the latest CB released version. You should always update to the latest CB version unless otherwise stated. As CB 2.0.14+ works on Joomla 3.5.x, **CBSubs™ GPL 4.1 also works on these Joomla versions**.
- Depending on PHP version and other extensions present on your website 48M or more of PHP memory must be configured on your hosting environment.
- **CURL** recommended on your website environment (check with your host).
- **OPENSSL** recommended on your website environment (check with your host).
- For payment handling you need one or more of the following:
 - PayPal business account (and sandbox account for testing)
 - Paypal Pro account
 - Authorize.net business account
 - Swiss PostFinance account (Swiss Bank payment system known as YellowPay in earlier **CBSubs™** versions)

¹ The word mambot has been replaced by plugin in the Joomla world

- Ogone account (International payment services organization) – need Ogone Alias Manager service for auto-recurring payment handling.
- 2Checkout (2CO) international online payment solution account – integration plugin must be downloaded and installed separately
- CCBill account – integration plugin must be downloaded and installed separately
- AlertPay account – integration plugin must be downloaded and installed separately
- eWAY account – integration plugin must be downloaded and installed separately
- TeleMoney EasyPay account – integration plugin must be downloaded and installed separately
- WorldPay account – integration plugin must be downloaded and installed separately
- QuickPay account – integration plugin must be downloaded and installed separately
- Moneris eSELECTplus account – integration plugin must be downloaded and installed separately
- CIC Credit Mutuel account – integration plugin must be downloaded and installed separately


If you have a professional budget and need a special payment gateway, please contact us (www.joomlapolis.com/contact-joomlapolis).

1.2 Additional Compatible Systems

The **CBSubs™ GPL** package currently integrates nicely (via **CBSubs™ GPL** integration plugins) with the following extensions and scripts:

- iDevAffiliate3 system supported by the folks at: www.idevdirect.com
- PAP (PostAffiliate Pro) version 4 system. The version of PAP tested with **CBSubs™ GPL** is version 4.5.48.1 and can be found at the provider's website:
www.qualityunit.com

You can read more about **CBSubs™ GPL** and PAP integration in **Chapter 6.18** and Chapter **7.3.8.2**.

-  - # Open source web analytics is a downloadable, Free GPLv3 licensed real time web analytics software program. You can find it at <http://piwik.org> and download it.
- GroupJive 3.x CB Plugin set. GroupJive extends CB and allows users to create common interest groups. It is available for paid members at Joomlapolis as described here: www.joomlapolis.com/memberships.
The version tested with **CBSubs™ GPL** is version 3.0.1.
GroupJive is available from: www.joomlapolis.com/cb-solutions/groupjive.
- AcyMailing extension (version 1.3.0 tested with **CBSubs™ GPL**) – a Joomla 1.5.x compatible newsletter component available by the folks at: www.acyba.com.

AcyMailing is a commercial product that must be purchased separately. Joomlapolis users may be able get a discount on AcyMailing subscription packages. Please visit www.joomlapolis.com/promotions to see active discount coupons and promotions.

These extensions of course are optional and the **CBSubs™ GPL** system works just fine without them.

1.3 Acknowledgements, Credits, Copyrights, License

The **CBSubs™ GPL** system is released as a GPL product.

This system would not have reached its current maturity without the help of a dedicated team of testers and users who have boldly participated in the live and painful beta process. We cannot thank them enough ☺.

CBSubs™ GPL 4.1 is a mature product that is currently empowering hundreds of Joomla/CB websites allowing them to provide automated turnkey subscription membership management online services.

1.4 Current Document Version Note

This document is always under development. Please visit www.joomlapolis.com to post your suggestions so we can improve this document. Thank you for your understanding. The documentation forum area is located at:

www.joomlapolis.com/forum/95-documentation

1.5 Current CBSubs™ GPL Version Note

The current version of the actual software is **4.1**. You should always upgrade to the latest available version to stay up-to-date with security fixes, bug fixes and new features. You should periodically check the relevant **CBSubs™ GPL** area on Joomlapolis and monitor your **CBSubs™ GPL** backend panel for update messages (see **Chapter 7.1**). The **CBSubs™ GPL** area on the Joomlapolis website is located here:

www.joomlapolis.com/forum/86-cbsubs-paid-membership-management-solution

CBSubs™ GPL version **4.1** is features release. The main features release notes follow:

- Version **4.1** needs to be installed on CB 2.0.14 or better and works on all Joomla 3.x versions.
- <https://www.joomlapolis.com/news/18550-cbsubs-gpl-41-content-control-everywhere>

1.6 Importance of Backup

CBSubs™ GPL stores the status of your members and their subscriptions in your CMS database installation. If you do not have your own (not your host's) backup process in place, then you should set this up at once – like NOW!

Take some time to think of the implications if something goes wrong and you lose all the subscription information and payments made by your membership. Prepare for the unthinkable, backup, backup and backup!

There are many nice utilities that you can install on your CMS to assist you in the backup process and the hopefully never needed restoration process.

This simple tip **WILL** save you big bucks if/when something goes wrong.

1.7 Community Builder (CB) Detailed Documentation

CBSubs™ GPL is a Community Builder extension. Familiarity with Community Builder is assumed and required in order to take full advantage of your **CBSubs™ GPL** package. Unlike **CBSubs™ GPL**, CB is a free, (but also) open source package that has no substantial financial support and has chosen to offer various extended membership packages to support itself. Please note that you can supplement your CBSubs GPL membership by also becoming a Professional member on Joomlapolis. Or you can become a Developer member that includes CBSubs. You can learn more about these membership plans at: www.joomlapolis.com/memberships.

Please note that the above membership plans can be used to get better support for **CBSubs™ GPL** related issues in addition to CB issues for all your websites!

2 Features Overview

The **CBSubs™ GPL** system is extremely flexible and configurable. We will try to outline some of the many core features and embedded functions.

- Seamless integration with your CB site and the underlying CMS
- Supports Joomla 3.x ACL permissions (see **Chapter 7.3.6**)
- Ability to present **CBSubs™ GPL** plans during the registration process
- Ability to hide specific CB fields on your registration form based on the selected **CBSubs™ GPL** plan
- Ability to adjust the CB registration workflow based upon the selected **CBSubs™ GPL** plan
- Ability to restrict CMS content access, content manipulation, extension access, menu access, URL access based upon active **CBSubs™ GPL** plan – this is accomplished without any CMS alterations or hacks.
- On restricted content, teaser messages are allowed in order to attract new subscriptions – **CBSubs™ GPL** automatically proposes plans that lead to this specific content access.
- Ability to specify if a plan can be upgraded to or only selected during the registration phase.
- Ability to restrict presentation of **CBSubs™ GPL** plans (for upgrading) based on user CMS group (e.g., you can have a plan that is only presented to authors). Backend only plans can also be provisioned.
- Ability to prorate residual plan value when upgrading to higher level plan
- Ability to specify the number of times a plan can be renewed
- PayPal, Authorize.net, 2Checkout (2CO), Ogone International and Swiss PostFinance payment organizations are supported by default main plugin installation.
- Off-line gateway support for membership off-line payment methods. Authorized users can create orders on behalf of other users and record off-line payments received from frontend. See **Chapter 13** and **13.1**.
- Additional payment gateways are also available as separate downloads. Currently the following extra installations are available: **PayPal Pro**, **CCBill**, **Payza (former AlertPay)**, **CIC Credit Mutuel**, **Moneris eSELECT plus**,

QuickPay, TeleMoney EasyPay and WorldPay. New gateways are continuously released and you should check Joomla!polis for up-to-date list.

- Major credit cards supported via PayPal, PayPal Pro, Google Checkout, Authorize.net, Swiss PostFinance, Ogone, CCBill, Payza (former AlertPay), CIC Credit Mutuel, Moneris eSELECT plus, QuickPay, TeleMoney EasyPay and WorldPay gateways.
- Recurring, periodic payments supported (provided that payment organization also supports this functionality). Currently available for PayPal, PayPal Pro, Authorize.net, 2CheckOut (need to create 2CO products – see **Chapter 7.4.3.1**), Ogone (needs Alias functionality on Ogone side), CCBill, WorldPay and AlertPay.
- Subscription plans can form a two level (parent-child) hierarchy.
- Donation plans supported.
- Merchandise plans supported.
- Subscription plan may have trial period with different (or free) cost compared to the normal subscription plan.
- Automatic Invoice generation and Storage for plans.
- Proforma and final invoice numbering.
- Integration with iDevAffiliate and PostAffiliatePro commissioning scripts – this is accomplished with the **CBSubs iDevAf** (see **Chapter 6.17**) and the **CBSubs PostAfPro** integration (see **Chapter 6.18**) plugins.
- Integration with Google Analytics – this is accomplished with the **CBSubs GoogleAnalytics** integration plugin (see **Chapter 6.6**).
- Integration with Piwik (see <http://piwik.org>) – this is accomplished with the **CBSubs Piwik** integration plugin (see **Chapter 6.7**).
- Integration with AcyMailing newsletter extension for Joomla! 1.5. This is accomplished with the **CBSubs AcyMailing** integration plugin (see **Chapter 6.13**).
- Ability to assign values to CB fields for users based upon subscription plan enrolment – this is accomplished with the **CBSubs CB Field** integration plugin (see **Chapter 6.4**).
- Ability to provision CB Tabs or CB Fields based on specific **CBSubs™ GPL** plan membership. Also able to restrict CB Tab or CB Field visibility based on

specific **CBSubs™ GPL** plan membership for viewer. This is accomplished by the **CBSubs Fields Tabs Protect** integration plugin (see **Chapter 6.10**).

- Assign a plan image to a CB Field based on **CBSubs™ GPL** plan subscription – this is accomplished with the **CBSubs Plans Image** integration plugin (see **Chapter 6.12**).
- Protect server folder (apache only) access based on **CBSubs™ GPL** plan subscription (via htaccess method) – this is accomplished by the **CBSubs Folder Access** integration plugin (see **Chapter 6.11**).
- Ability to execute SQL statements against your CMS database during **CBSubs™ GPL** plan membership activation / deactivation – this is accomplished by the **CBSubs SQL Actions** integration plugin (see **Chapter 6.16**).
- Ability to execute external scripts by initiating URL calls based on specific **CBSubs™ GPL** events – this is accomplished by the **CBSubs URL** integration plugin (see **Chapter 6.9**).
- Backend graphics and statistics panel.
- Ability to track subscriptions on the **CB User Management** summary page.
- Offline payment handling.
- Import functionality to initialize your existing website membership with newly created **CBSubs™ GPL** plans.
- Accept terms and conditions statement during payment process (configurable).
- Flexible and highly configurable sales tax environment. Tax system is pre-populated with 249 countries and 4501 related states / provinces. You need to install the **CBSubs Tax** integration plugin (see **Chapter 6.20**) and configuring it appropriately (see **Chapter 7.16**).
- Smart Promotions environment. Configure flexible and personalized promotions (see **Chapter 7.17 and Chapter 8**).
- URL plan supports placing the 's' character after the planid in order to have this plan preselected (see **Chapter 7.5.6.18** for additional information).
- Display plans depending on other plan or CB field value conditions (see **Chapter 7.5.4** for additional information).
- Specify start date of calendar year plans. See **Chapter 7.5.2** for more information regarding the new 'Start date of calendar year' parameter.

- Currency selection during checkout dependent on payment gateway.
- Mailer integration plugin with highly configurable personalized marketing emailing (and private messaging) based on specific CBSubs related timed events.

3 CBSubs™ GPL Expectations

Before digging into details regarding the various **CBSubs™ GPL** parameters and how they influence the overall functionality and interaction with the peripheral systems (CB, CMS, Payment organisation, website member, etc.), let us spend some time describing the expected end results.

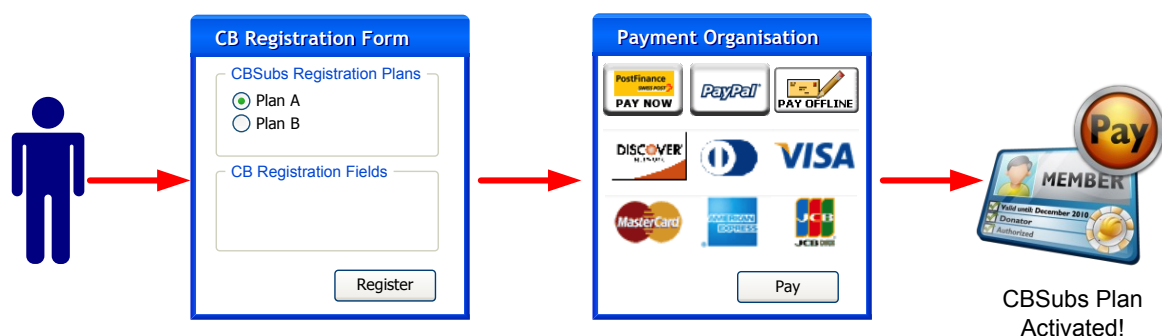


Figure 1: Registration Process with CBSubs™

CBSubs™ GPL may interact with your CB website registration form and process as illustrated in **Figure 1**. As we will see later on (**chapter 7.5**) a **CBSubs™ GPL** subscription plan can be configured to appear during the registration phase. This means that the plan name and description along with its validity and price will be presented during the registration process for applicants to consider. **CBSubs™ GPL** plans may also be configured in such a way as to force the applicant to subscribe to at least one plan. **CBSubs™ GPL** plans may also be hidden from the initial registration process and only offered as an upgrade option at a post registration phase.

In **Figure 2** we see two **CBSubs™ GPL** subscription plans presenting on the CB registration form. In this specific case, one of the two plans must be selected in order

for the registration form to be accepted (this, of course, is configurable as we will see later on in this document).

Registration

 Required field |  Field visible on your profile |  Field **not** visible on profile |  Information: Point mouse to icon

Subscription Plan:

☐

Free CBADDONS Plan

This is a free lifetime plan!

































Lifetime Subscription for Free.

☐

Club Plan A

This plan gives you access to our content and download area.

1 hour for USD 1.00.

Name:	<input type="text"/>	   
Email:	<input type="text"/>	   
Username:	<input type="text"/>	   
Password:	<input type="password"/>	   
Verify Password:	<input type="password"/>	   
Birthdate:	<input type="text"/> / <input type="text"/> / <input type="text"/>	  
Company:	<input type="text"/>	
City:	<input type="text"/>	
State:	<input type="text"/>	
Zip Code:	<input type="text"/>	
Country:	<input type="text"/>	
Address:	<input type="text"/>	
Phone #:	<input type="text"/>	
Fax #:	<input type="text"/>	
Profile image:	<input type="text" value="No profile image"/>	

REGISTER

 Required field |  Field visible on your profile |  Field **not** visible on profile |  Information: Point mouse to icon

Figure 2: CB Registration form with CBSubs™ GPL plans

As you will see in following chapters, the **CBSubs™ GPL** plans can be rearranged in terms of registration order just like the rest of the CB tabs, since it also generates a CB tab in the CB Tabs Management backend.

Let's assume that a new applicant has filled out our sample registration form illustrated in **Figure 2** and selected the Club Plan A subscription plan and submitted it by clicking in the Register button. Since Club Plan A is chargeable, the **CBSubs™ GPL** system will process this request and should display a follow-up payment/invoice address page for our applicant to process. Such a case is illustrated in **Figure 3**. In this figure it appears that our applicant has not filled in all the invoice related information and **CBSubs™ GPL** is giving the user one more chance to provide this data (address, phone, etc.) before the invoice is generated. On the same form a number of payment icon-buttons are presented (based on the active **CBSubs™ GPL** Payment Gateways – see **chapter 7.4**) for our applicant to click on.

Home
Your registration data has now been saved, but your subscription isn't active yet. You need now to pay the subscription:

Your membership for payment:	
Item	Price
Subscription Plan: Club Plan A: 1 hour for fenia	USD 1.00
Total	USD 1.00

Invoicing address

This is your invoicing address:

First Name: Fenia
Last Name: A
Company:
Address:
City:
State: -
Zipcode:
Country: -
Phone:

[Click here to modify invoicing address](#)

Please click now on this button to pay:



[Cancel payment and subscription](#)

Figure 3: CBSubs™ Invoice and Payment page

Assuming that our applicant clicked on the '**PayPal**' button in **Figure 3**, he or she will be taken to the PayPal site in order to complete his or her credentials and actually authorize the payment.



This is illustrated in **Figure 4** where the applicant must fill-in his/her PayPal Email and Password and click on the **Log In** button. You will also notice that, in **Figure 4**, PayPal has displayed the **CBSubs™** subscription plan name and the username of the user-applicant along with the amount due (\$1.00 USD).

CB Addons

[U.S. English](#)

Club Plan A for feniaTotal: \$1.00 USD




PayPal is the safer, easier way to pay online.

  Secure Payments

PayPal securely processes payments for CB Addons. You can finish paying in a few clicks.

Why use PayPal?
Security: Keep your financial information private when paying.
Convenience: Just enter email and password to pay.
Speed: Less typing means you speed through checkout.

Don't have a PayPal account?
Use your credit or debit card to pay.

Continue

[Return to CB Addons.](#)

PayPal. The safer, easier way to pay.
For more information, see our [Privacy Policy](#), [User Agreement](#) and [Service Description](#).

Copyright © 1999-2009 PayPal. All rights reserved.



Log in to PayPal
Email:
Password:
Log In
[Forgot email](#) or [password?](#)

Figure 4: CBSubs™ PayPal login page

Upon successful PayPal login our user-subscriber will be taken to PayPal Payment review page as illustrated in **Figure 5**. Once our subscriber is satisfied with all the information presented in this page, he or she may click on the **Pay Now** button to finalize the process as far as PayPal is concerned.

CB Addons

Review your payment



[Secure Payments](#)

If the information below is correct, click **Pay Now** to complete your payment.

[Learn more](#) about how PayPal withdraws funds.

Description	Unit Price	Quantity	Amount
Club Plan A for fenia Item # S20-99-16	\$1.00	1	\$1.00

Total: \$1.00 USD

[Enter gift certificate, reward, or discount](#)

Pay Now

Payment Method:

PayPal Balance

€0.77 EUR

PayPal Conversion Rate as of Jan. 11, 2009: 1 Euro = 1.30820 U.S. Dollars



[Change](#)

Figure 5: CBSubs™ GPL PayPal Pay Now page

After your new subscriber clicks on the **Pay Now** button, a new transitional page will be briefly displayed on the PayPal site and then your subscriber will be redirected back to your website. This transitional PayPal page is illustrated in **Figure 6**.

CB Addons

You Made A Payment



[Secure Payments](#)

Your payment for \$1.00 USD has been completed.

You are now being redirected to **CB Addons**

If you are not redirected within 5 seconds [click here](#).

PayPal. The safer, easier way to pay.
For more information, see our [Privacy Policy](#), [User Agreement](#) and [Service Description](#).

Copyright © 1999-2009 PayPal. All rights reserved.

Figure 6: CBSubs™ GPL PayPal Payment Success transition page

Once the transitional page expires, your subscriber should see a '**Registration Complete!**' page on your website. Such a page is illustrated in **Figure 7**. Of course, just like CB all these pages are customizable via the relevant **CBSubs™** language files (see **Chapter 6.19**).

Registration Complete!

You may now log in.

Thank you for your payment of USD 1.00 for the Club Plan A for fenja using your paypal account. Your transaction has been completed, and a receipt for your purchase has been emailed to you by PayPal. You may log into your account at www.paypal.com to view status details of this transaction.

[View printable invoice](#)

Thank you for subscribing. You can manage your subscriptions anytime from your user profile.

Figure 7: CBSubs™ GPL Payment Success page

The default page does provide a '**View printable invoice**' link in its displayed text. When this link is click on, a new window will appear containing the invoice generated by this subscription sales process. Such a window is illustrated in **Figure 8**.

Community Builder Addons

<http://www.cbaddons.com>

your address
your town / country
BestSite
Address
Town
VAT id #:

Date: 01/11/2009

Fenia A

Invoice N179794276980214

Pos.	Quantity	Art. Num.	Item	Price
1	1	S20-99-16	Subscription Plan: Club Plan A: 1 hour for fenja	USD 1.00
Total				USD 1.00

Payment method: instant

Terms and conditions: Use of our website and of any purchase is subject to our general conditions available on this website <http://www.cbaddons.com>.

[PRINT](#)

[CLOSE](#)

Figure 8: CBSubs™ GPL generated invoice

The invoice layout and contents shown in the figure are of course customizable. This more or less completes the subscription process. As previously stated, the **CBSubs™** system integrates nicely with CB. If at this point you check out the CB User Management backend, you will see an extra column titled 'Subscriptions' as illustrated in **Figure 9**.

User Management

Tab Management


Field Management

List Management


Plugin Management

Tools


Configuration




CB User Manager



New



Edit



Delete

Search:

- Select Login State -

- Select Group -

- Select User Status -

- Select Subscription Plan -

<< Start < Prev 1 Next > End >>

#	<input type="checkbox"/>	Name	UserName	Logged In	Subscriptions	Group	E-Mail	Registered	Last Visit	Enabled	Confirmed	Approved	ID
1	<input type="checkbox"/>	NoXstar	NoXstar		FREE	Registered	noxstar8@gmail.com	09/20/2008 09:00:58					85
2	<input type="checkbox"/>	Paulina Antimisialis	paulina		FREE	Registered		01/03/2009 23:14:19	01/10/2009 23:55:35				96
3	<input type="checkbox"/>	Nick A	nant		FREE	Registered		01/10/2009 15:35:03	01/10/2009 23:51:45				97
4	<input type="checkbox"/>	Fenia A	fenia		PLAN-A	Author		01/11/2009 17:17:05					99
5	<input type="checkbox"/>	Administrator	admin			Super Administrator		07/13/2008 13:18:49	01/10/2009 23:40:16				62
6	<input type="checkbox"/>	Beat B	beat			Super Administrator		08/18/2008 20:24:51	12/21/2008 00:55:20				72

Display #

20

<< Start < Prev 1 Next > End >>

Results 1 - 6 of total 6

Figure 9: CB User Management with Subscription Information

You will notice that not only has the user been marked as now being subscribed to PLAN A, but that the user has also been placed in the 'Author' (CMS ACL) group. This is how PLAN A has been setup (we will see how we can specify that subscription to a plan can change the group of this user when we discuss the various parameters available when specifying **CBSubs™ GPL** subscription plans in **chapter 7.5**).

By clicking on this newly subscribed, to Plan A, member in our CB User Management backend, we will see the extra tab titled: 'Subscriptions'. This is illustrated in **Figure 10**. On this subscription tab we can see the current subscription status and the available upgrade/deletion options. In our specific example, we see that the subscription to Club Plan A has been marked as expired although the user still appears to be marked in this subscription plan in the CB User Management summary page. This is due to yet another **CBSubs™ GPL** feature that allows us to specify a

grace period for each plan. Thus even though the subscription has expired, the user continues to benefit from the plan privileges for an extra grace period.

Community Builder User: Edit [fenia]

Portrait | Contact Info | Additional Info | **Subscription**

Your Subscriptions

fenia's current and past subscription:

Club Plan A
This plan gives you access to our content and download area.
1 hour Expired 01/11/2009 18:34:47
☐ Reactivate: 1 hour for USD 1.00. ☐ Delete

Current subscription upgrade possibilities:

☐ **Free CBADDONS Plan**
This is a free lifetime plan!
Lifetime Subscription for Free.

☒ **None**
Lifetime Subscription for Free.

Required field | Field visible on your profile | Field **not** visible on profile | Information: Point mouse to icon

Figure 10: Subscription tab in CB User Management Backend

The **CBSubs™ GPL** environment also provides some nice tracking tools and graphs. As illustrated in **Figure 11**, the 'Last 7 days payments' summary section gives the **CBSubs™ GPL** website administrator a nice summary of transactions and payments made during the last 7 days. We can see that our new registration has been properly accounted for in the first line of this figure.

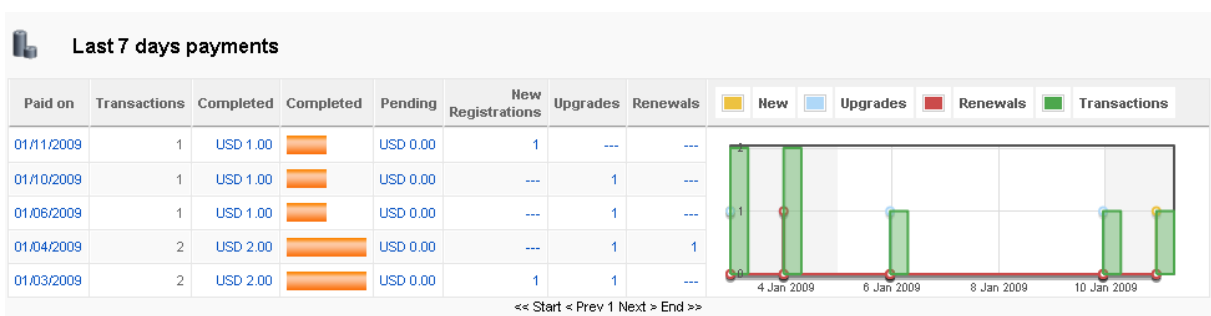
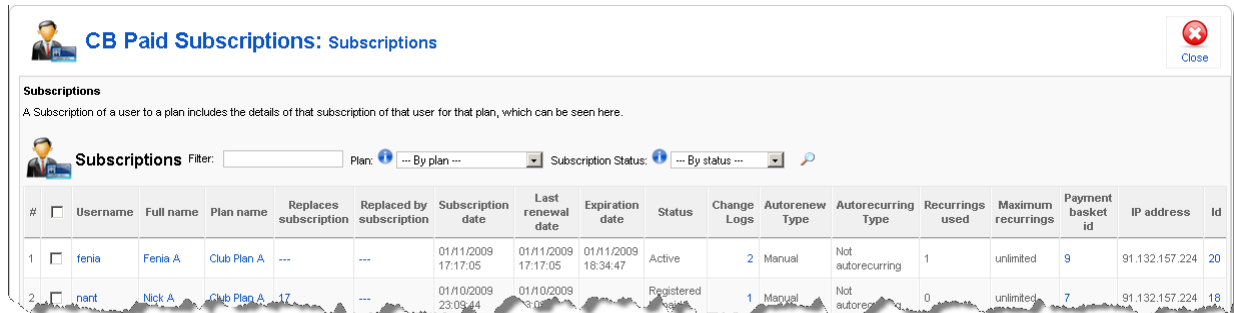


Figure 11: CBSubs™ GPL Last 7 days payments summary and graph

As you can see the graph also tracks new subscriptions, upgrades, renewals and overall transactions.

A special backend area of the system also tracks all **CBSubs™ GPL** subscriptions. Each subscription is nicely tracked in a last-in first-out display manner. This is illustrated in **Figure 12**.



#	Username	Full name	Plan name	Replaces subscription	Replaced by subscription	Subscription date	Last renewal date	Expiration date	Status	Change Logs	Autorenew Type	Autorecurring Type	Recurrings used	Maximum recurrings	Payment basket id	IP address	Id
1	fenia	Fenia A.	Club Plan A	---	---	01/11/2009 17:17:05	01/11/2009 17:17:05	01/11/2009 18:34:47	Active	2	Manual	Not autorecurring	1	unlimited	9	91.132.157.224	20
2	nant	Nick A.	Club Plan A	17	---	01/10/2009 23:09:44	01/10/2009 23:09:44		Registered	1	Manual	Not autorecurring	0	unlimited	7	91.132.157.224	18

Figure 12: CBSubs™ GPL Subscriptions backend tracking

In this **CBSubs™ GPL** backend subscriptions area we can see all our vital data in a summary table and we can click on various elements to be directed to more details. Thus in summary format we can see for each subscription the following information:

- Username (e.g., fenia),
- Full name (e.g., Fenia A.),
- Plan name (e.g., Club Plan A),
- Replaces subscription,
- Replaced by subscription,
- Subscription data,
- Last renewal date,
- Expiration date,
- Status,
- Change Logs,
- Autorenew Type,
- Auto-recurring Type,
- Recurrings used,
- Maximum recurrings,
- Payment basket id,
- IP address,
- Id

This quick walk-through has hopefully given us a nice overview of what the **CBSubs™ GPL** environment can do for you and how it could look to your prospective subscribers and to the **CBSubs™ GPL** backend administrator.

One last thing that we have not really addressed is what privileges a **CBSubs™ GPL** plan can provide to its subscribers. The following is a list of things you can restrict or provide to your subscribers via **CBSubs™ GPL**:

- You can automatically bump a plan member to a specific CMS ACL group. For example, you might have a **CBSubs™ GPL** Author subscription plan that automatically places these subscribed members in the 'Author' group and upon subscription expiration would place them back to 'Registered' group.
- You can restrict any CMS content by specific article, content category, content section, etc., based on **CBSubs™ GPL** plans. You can even allow teaser portions open to non-subscribers and when they want to read more they will be confronted with a message pointing them to the **CBSubs™ GPL** subscription plans that will allow them to view the specific content. **CBSubs™ GPL** is smart enough to only propose those plans that allow them to see the restricted content.
- You can restrict access to any CMS extension (component or module) based on **CBSubs™ GPL** plan membership. For example, you can have a **CBSubs™ GPL** subscription plan called Forum Plan that allows access to specific forum areas (even if the forum component does not do this on its own).
- You can assign specific values to CB fields based on **CBSubs™ GPL** plan membership. For example, you could have a **CBSubs™ GPL** Gold plan that assigns the value 'gold' to a CB field named 'cb_memberstatus'. This CB field may then appear in a nice prominent place on the user profile for other members to see.

There are many more things you can manage and restrict using the **CBSubs™ GPL** system on your CB powered website. Also, the overall architectural approach used during the design phase of this system permits and enables expandability.

CBSubs™ GPL also has some nice built-in marketing tools that can be used to attract and retain paying members.

One such tool is the **CBSubs™ GPL** module. This module can be used to display targeted messages to the entire set of your customer base. For example:

- You can display messages that will only appear to public guests.
- You can display personalized messages encouraging members to subscribe to new plans or to upgrade based on their current status.
- You can display personalized messages regarding incomplete or pending processes.

These concepts are illustrated in **Figure 13** where we have given examples of how the **CBSubs™ GPL** module reacts to different viewers.

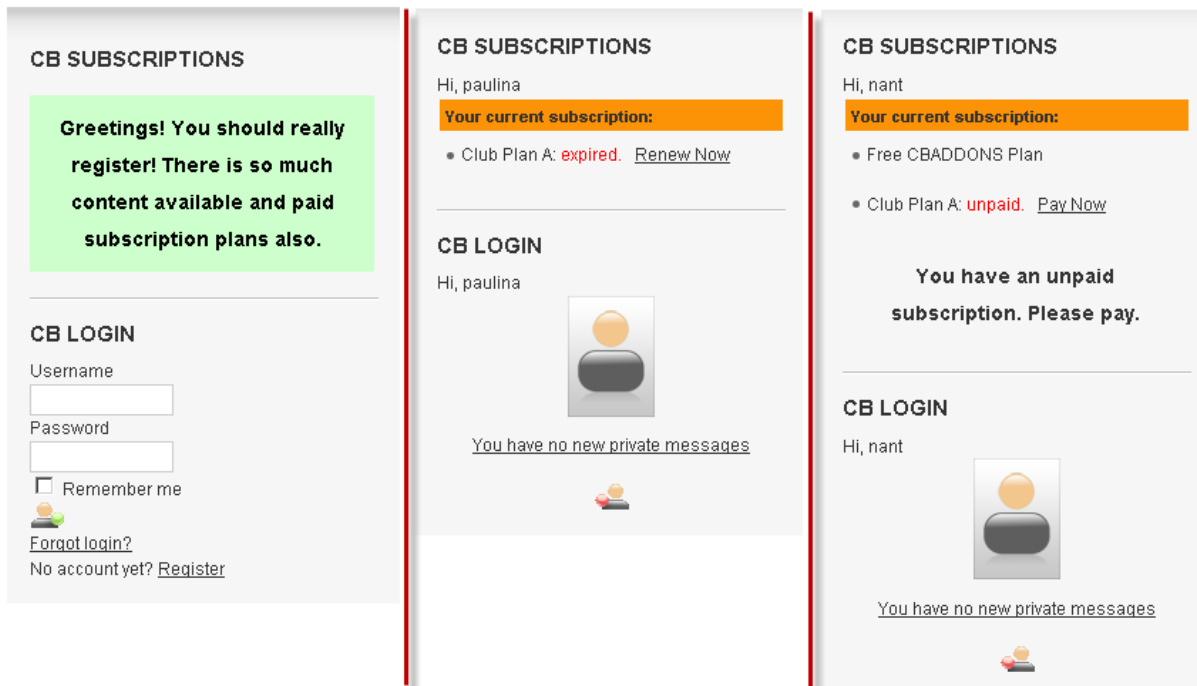


Figure 13: CBSubs™ GPL Module in action

4 How to Upgrade from previous version

If you already have **CBSubs™** installed and want to upgrade to this latest version (4.1), you can follow a number of upgrade processes depending on your level of expertise and familiarity. Before starting you should check that your environment has all prerequisites in place. Make sure that the CB version installed is compatible with the latest **CBSubs™ GPL** version you are trying to upgrade to. If not then you need to upgrade your CB version before starting the **CBSubs™ GPL** upgrade process.

Once you have downloaded the new distribution package from the **CBSubs™ GPL** download area on Joomlapolis, then you can use one of the following upgrade methods:

- On your Joomla 3.x website:
 - First place your website in offline mode and take a backup.
 - While your website is in offline mode, just install any **CBSubs™ GPL** elements you have on your website. These will just install over existing packages without losing any parameters. Make sure to use CB Plugin Manager installer when installing CB Plugins and Joomla installer when installing the *joomlaplugin_cbpaidsubsbots-4.1.0.zip* and *mod_cbsubscriptions-4.1.0.zip* packages. If you have made any modifications to your default **CBSubs™ GPL** language files you need to reapply them to the new language file plugin contained in the **CBSubs™ GPL 4.1** distribution package. For proper method to customize your **CBSubs™ GPL** strings see **Chapter 16.1**.
 - Run all CB Tools and visit all backend areas of **CBSubs™ GPL** to verify that everything looks normal
 - Bring your website back online.
- FTP Method
 - Once again you should place your website in offline mode and take a backup
 - Unzip all relevant **CBSubs™ GPL** packages and use your FTP client to over-write the relevant website folders. If you have made any language

file changes, then you might want to keep your old language files and manually apply your changes again to new distribution language plugin.

- Run the CB Tools checks to trigger any database upgrades that might need to take place.
- Bring website back to online mode.

If you feel that something has gone wrong or do not fully understand the process, then by all means post your concerns to the relevant **CBSubs™ GPL** forums on Joomlaopolis.

5 How to get the system

The **CBSubs™ GPL** system is a commercial product and only valid members can download it from Joomla!polis.

5.1 The Distribution Package

Once you have completed the **CBSubs™ GPL** membership purchasing formalities, you will be able to download the distribution package, which contains following:

Filename	Nature	Name
cbplug_CBSubs_MAIN-4.1.0.zip	CB User Plugin	CB Paid Subscriptions
cbplug_cbsubstemplate_rounded-4.1.0.zip	CB User CBSubs Template	rounded
cbplug_int_cbsubscbfield-4.1.0.zip	CB User CBSubs Plugin	CBSubs CB Field
cbplug_int_cbsubscontent-4.1.0.zip	CB User CBSubs Plugin	CBSubs Content
cbplug_int_cbsubsidevaf-4.1.0.zip	CB User CBSubs Plugin	CBSubs iDevAf
cbplug_int_cbsubspostafpro-4.1.0.zip	CB User CBSubs Plugin	CBSubs PostAfPro
cbplug_int_cbsubssqlactions-4.1.0.zip	CB User CBSubs Plugin	CBSubs SQL Actions
cbplug_int_cbsubsemail-4.1.0.zip	CB User CBSubs Plugin	CBSubs Email
cbplug_int_cbsubsgooleanalytics-4.1.0.zip	CB User CBSubs Plugin	CBSubs GoogleAnalytics
cbplug_int_cbsubsgroupjive-4.1.0.zip	CB User CBSubs Plugin	CBSubs GroupJive
cbplug_int_cbsubsurl-4.1.0.zip	CB User CBSubs Plugin	CBSubs URL
cbplug_int_plug_cbsubsfieldstabsprotect-4.1.0.zip	CB User Plugin	CBSubs Fields Tabs Protect
cbplug_int_plug_cbsubsfolderaccess-4.1.0.zip	CB User Plugin	CBSubs Folder Access
cbplug_int_plug_cbsubsplanimage-4.1.0.zip	CB User Plugin	CBSubs Plans Image
cbplug_int_cbsubsacymailing-4.1.0.zip	CB User CBSubs Plugin	CBSubs AcyMailing
cbplug_int_cbsubstax-4.1.0.zip	CB User CBSubs Plugin	CBSubs Tax
cbplug_int_cbsubspromotion-4.1.0.zip	CB User CBSubs Plugin	CBSubs Promotion
cbplug_int_cbsubsmailer-4.1.0.zip	CB User CBSubs Plugin	CBSubs Mailer
cbplug_int_cbsubspiwik-4.1.0.zip	CB User CBSubs Plugin	CBSubs Piwik

joomlaplugin_cbpaysubbot-4.1.0.zip	CMS Plugin	cbsubbot
mod_cbsubscriptions-4.1.0.zip	CMS Module	CB Subscriptions

Please note that you do not need to install everything. You only need to install items that are relevant to your specific needs. So please refrain from rushing ahead to install everything and continue reading this manual to better understand what is needed and what is not for your specific use case.

5.2 Extra Packages

Additionally there are a number of extra packages in the CBSubs distribution that support specific payment gateways:

Filename	Nature	Name
cbplug_processor_twocheckout-4.1.0.zip	CB User CBSubs Plugin	2Checkout
cbplug_processor_ccbill-4.1.0.zip	CB User CBSubs Plugin	CCBill
cbplug_processor_payza-4.1.0.zip	CB User CBSubs Plugin	Payza
cbplug_processor_ciccreditmutuel-4.1.0.zip	CB User CBSubs Plugin	CIC Credit Mutuel
cbplug_processor_telemoneyeasypay-4.1.0.zip	CB User CBSubs Plugin	TeleMoney EasyPay
cbplug_processor_eway-4.1.0.zip	CB User CBSubs Plugin	Eway
cbplug_processor_moneriseselectplus-4.1.0.zip	CB User CBSubs Plugin	Moneris eSELECTplus
cbplug_processor_quickpay-4.1.0.zip	CB User CBSubs Plugin	Quickpay
cbplug_processor_worldpay-4.1.0.zip	CB User CBSubs Plugin	Worldpay
cbplug_processor_paypalpro-4.1.0.zip	CB User CBSubs Plugin	PayPal Pro

6 How to install for first time

The **CBSubs™ GPL** system is comprised of a number of CB plugins², a CMS module and a CMS plugin (mambot). CB Plugins are installed via the **CB Plugin Management** backend panel. The module and the mambot are installed via the proper CMS installation procedure.

6.1 Verifying your Environment (pre-installation checklist)

Before going through the installation process, it is good and prudent to go through a checklist and verify that your current environment is proper and that all prerequisites are present. This will save you potential frustration and time in the future.

The following is a list of items you should check before you begin the **CBSubs™ GPL** system installation process:

- ✓ Make sure you have the latest CB package (must be CB 2.0.13 and above) installed on a compatible CMS (Joomla 3.x).
- ✓ Remember, CB 2.0.14+ needs PHP 5.0 or better. PHP 4 is no longer supported. Latest PHP version tested with **CBSubs™ GPL** is PHP 5.4.
- ✓ Always good to verify that you have the latest CB version installed for security reasons. You can check this out by visiting your Community Builder Configuration area in your website backend.
- ✓ Your CB 2.0.14+ installation has a Tools menu in the backend that allows you to check your CB installed database. Always a good idea to run this and verify that all is **green**.
- ✓ Make sure that the appropriate permissions (and ownership) are given on the Joomla folders (check with www.joomla.org for proper permissions).

² As you will see later on, not all CBSubs™ plugins need to be installed. Depending on your specific needs, some plugins can be omitted.

- ✓ [Optional - recommended] Verify that your environment has **OPENSSL** support in place. This is also verified by asking your hosting company. If it is not present, then request that it should be installed. If your hosting company refuses and you want to use public/private key protection and your payment gateway organization cannot operate without this, then there is very little secure e-commerce you can do on this environment and you should seriously consider switching hosting companies. You should be able to assess if your specific hosting account has this feature by looking at your Joomla system information section in your Joomla administration panel. You will also need to have an **OPENSSL** client on your desktop to generate needed public keys for your payment gateway (see **Chapter 19**).

- ✓ [Optional - recommended] Verify that your environment has **CURL** support in place. This is also verified by asking your hosting company. If it is not present, then request that it should be installed. **CBSubs™ GPL** will work without CURL support. You should be able to assess if your specific hosting account has this feature by looking at your Joomla system information section in your Joomla administration panel.

Once you have verified this checklist you can safely continue with the installation process.

6.2 Identified Issues

In an open environment where administrators and hosts chose to install many different extensions and system functions, the combinations are enormous. As **CBSubs™ GPL** begins to utilize different environments some issues and conflicts will surely be encountered. The **CBSubs™ GPL** forum area on Joomlapolis (<https://www.joomlapolis.com/forum/277-cbsubs-gpl-support>) should be consulted in case of a problem. Hopefully, another CBSubs™ GPL user with a similar environment has previously encountered your specific problem-issue and a solution might already be present.

6.3 Installing the CBSubs™ GPL Core Plugin



Why should I install this? Do I really need this?

Yes. You need to install this. This is the mandatory core CB plugin needed by **CBSubs™ GPL**. You cannot do anything without this plugin.

To install the **CBSubs™ GPL** core CB plugin, like any other CB plugin, you need to access the CB Plugin Management backend and follow the normal CB plugin installation seven-step process. The **CBSubs™ GPL** core plugin is represented in the distribution package as the ***cbplug_CBSubs_MAIN-4.1.0.zip*** file.

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the ***cbplug_CBSubs_MAIN-4.1.0.zip*** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named ***CB Paid Subscriptions*** is added to the CB Plugin Management backend.

This process is visually depicted in **Figure 14**. If you follow the process and all go well, you should see the successful installation message shown in **Step 6 of Figure 14** and you should also see a new row added to the CB Plugin Management backend as illustrated in **Step 7 of Figure 14**.

At this point there is no need to publish the plugin (we will do this later on) – so you can leave the plugin status as is with a red **X** as shown in **Step 7 of Figure 14**.

The seven steps CB Plugin installation process outlined in **Figure 14** will be referenced many times during the **CBSubs™ GPL** installation process, so it is recommended that you invest some time at this point to closely look at the process and study it.

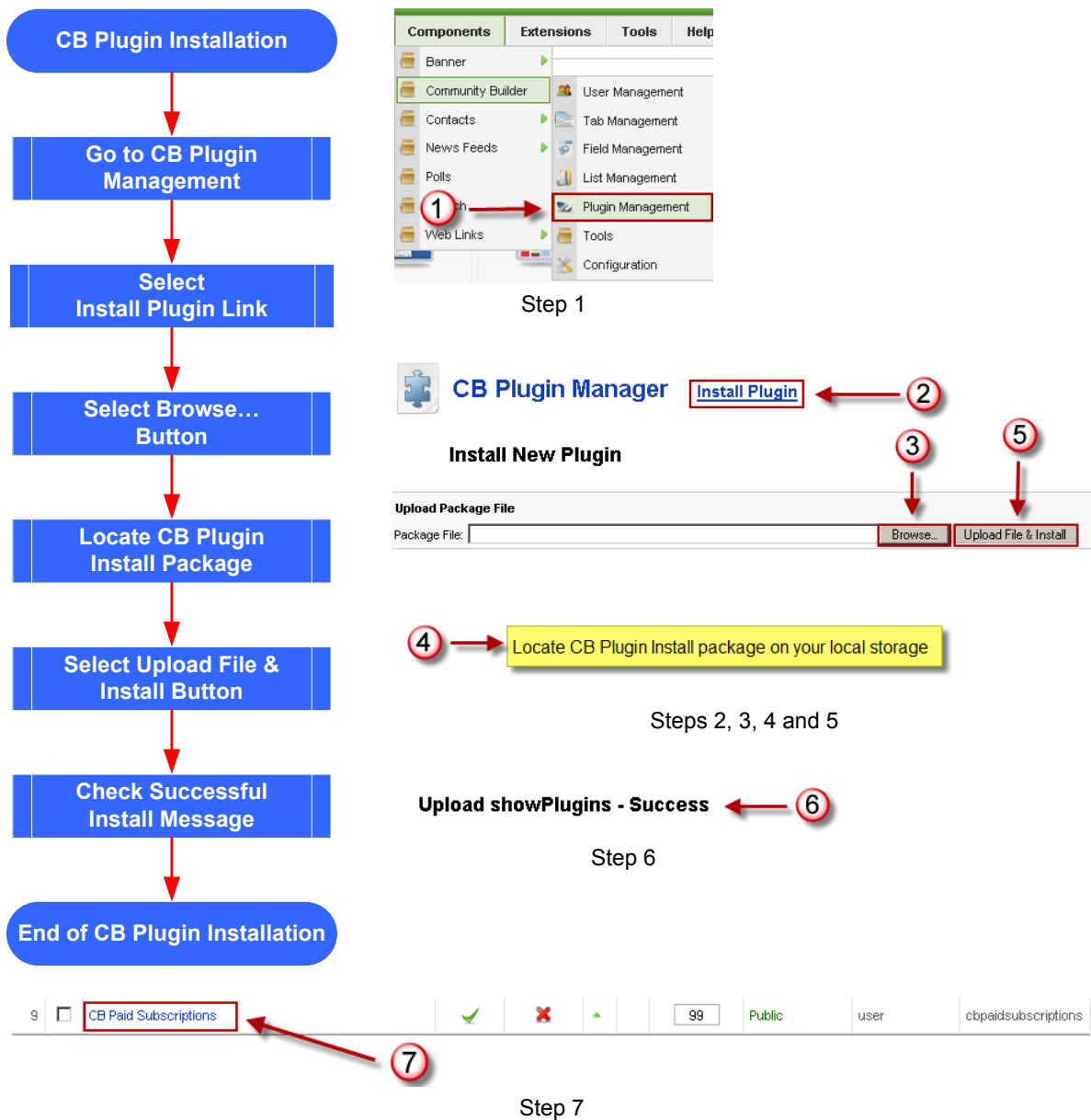


Figure 14: CB Plugin Installation Process

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions

6.4 Installing the CBSubs™ GPL CB Fields Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to create subscription plans that populate existing CB fields with pre-specified values. Examples: You can have a CB checkbox field that is automatically populated with the value 1 (meaning Yes) when a user subscribes to a plan and can be set to 0 (meaning No) when subscription ends. You can also perform limited calculation if the CB field is of type integer (e.g., incrementing or decrementing the value of a CB integer field by a given value, etc.).

The **CBSubs CB Field** Integration plugin is represented in the distribution package as the ***cbplug_int_cbsubscbfield-4.1.0.zip*** file. This integration plugin is used to create an interface between **CBSubs™ GPL** and CB fields. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.6.6**.

The CB Fields Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The **CBSubs CB Field** integration plugin is represented in the distribution package as the ***cbplug_int_cbsubscbfield-4.1.0.zip*** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the ***cbplug_int_cbsubscbfield-4.1.0.zip*** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs CB Field** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubscbfield

6.5 Installing the CBSubs™ GPL Email Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to send personalized email messages to users based on specific subscription events.

The **CBSubs Email** Integration plugin is used to provide CBSubs™ with email functionality. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.6.9**.

The **CBSubs Email** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The **CBSubs Email** integration plugin is represented in the distribution package as the **cbplug_int_cbsubsemail-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubsemail-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs Email** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the CBSubs™ GPL official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubemail

6.6 Installing the CBSubs™ GPL Google Analytics Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to take advantage of the Google Analytics service to track and analyze your website traffic. If you have no idea about this specific service (<http://www.google.com/analytics/>), then there is no need to install this plugin. You can always install it later if needed.

The **CBSubs GoogleAnalytics** Integration plugin is used to integrate **CBSubs™ GPL** with Google Analytics. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.6.14**.

The **CBSubs GoogleAnalytics** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The **CBSubs GoogleAnalytics** integration plugin is represented in the distribution package as the **cbplug_int_cbsubsgoogleanalytics-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubsgoogleanalytics-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs GoogleAnalytics** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubsgooleanalytics

6.7 Installing the CBSubs™ GPL Piwik Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to take advantage of the free open-source Piwik Analytics software to track and analyze your CBSubs™ e-commerce traffic. If you have no idea about this specific software (<http://piwik.org>), then there is no need to install this plugin. You can always install it later if needed.

The **CBSubs Piwik** Integration plugin is used to integrate **CBSubs™ GPL** with the Piwik Web-Analytics Tracking software. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.3.8.5** and in **Chapter 7.5.6.15**.

The **CBSubs Piwik** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The **CBSubs Piwik** integration plugin is represented in the distribution package as the **cbplug_int_cbsubspiwik-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubspiwik-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs Piwik** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubspiwik

6.8 Installing the CBSubs™ GPL GroupJive Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to integrate **CBSubs™** with the CB GroupJive Plugin set (www.joomlapolis.com/cb-solutions/groupjive). Groupjive gives your website members extra functionality to create and maintain their own groups. Each GroupJive group can have group members, a group logo, a group forum area, etc. All of these features are provided by the GroupJive system and its integration with other third party extensions (forum extension, PMS extension, CB plugin, etc). If you have not installed the GroupJive extension on your website, then there is no need to install this plugin. You can always install it later if needed.

The **CBSubs GroupJive** Integration plugin is used to integrate **CBSubs™ GPL** with the CB GroupJive Plugin solution set. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.6.17**.

The **CBSubs GroupJive** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**.

The **CBSubs GroupJive** integration plugin is represented in the distribution package as the **cbplug_int_cbsubsgroupjive-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubsgroupjive-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs GroupJive** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubsgroupjive

6.9 Installing the CBSubs™ GPL URL Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin may be installed if you want to execute specific URL's based on **CBSubs™ GPL** plan related triggers. This integration virtually enables you to execute remote (or local) scripts that can be initiated via http URL hits. The actual URL can incorporate user specific parameters using CB field substitutions. If you have no need to execute external (to **CBSubs™ GPL**) scripts then there is no need to install this plugin. You can always install it later if needed.

The **CBSubs URL** Integration plugin is used to enable **CBSubs™ GPL** to execute third party scripts initiated via http URL calls. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.6.16**.

The **CBSubs URL** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The **CBSubs URL** integration plugin is represented in the distribution package as the **cbplug_int_cbsuburl-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsuburl-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs URL** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsuburl

6.10 Installing the CBSubs™ GPL Fields-Tabs Protect Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin must be installed if you want to control CB fields and CB tabs by **CBSubs™ GPL** plan subscriptions. With this plugin installed you will see extra parameters in your CB fields and CB tabs configuration areas permitting you to specify which plan members actually are provisioned a CB field/tab and which plan members can actually visually see a CB field/tab. This is an extremely powerful feature and it is discussed in detail in **Chapter 11**. If you do not plan to control CB fields or tabs by **CBSubs™ GPL** plan subscription, then there is no need to install this plugin. You can always install it later if needed.

The ***CBSubs Fields Tabs Protect*** Integration plugin is used to protect CB Fields and Tabs based on **CBSubs™ GPL** plans. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 11**.

The ***CBSubs Fields Tabs Protect*** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**.

The ***CBSubs Fields Tabs Protect*** integration plugin is represented in the distribution package as the ***cbplug_int_plug_cbsubsfldstabsprotect-4.1.0.zip*** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the ***cbplug_int_plug_cbsubsfldstabsprotect-4.1.0.zip*** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages

- Verify that a new row named ***CBSubs Fields Tabs Protect*** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ **plugin** ▶ **user** ▶ **plug_cbsubstfieldstabprotect**

6.11 Installing the CBSubs™ GPL Folder Access Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to protect a website folder based on **CBSubs™ GPL** plan subscriptions. It only works on Apache server installations that support htaccess and htpasswd files. With it you can control access to a website folder (that may contain, for example, downloadable items). Usernames are automatically added to a special Apache password file (htpasswd) and a pop up username/password dialog box will appear when folder access is attempted. If are not hosted on an Apache web-server and/or you do not plan to control website folder access by **CBSubs™ GPL** plan subscription, then there is no need to install this plugin. You can always install it later if needed.

The **CBSubs Folder Access** Integration plugin is used to enable **CBSubs™ GPL** to protect website folders (Apache server needed for this to work). More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.6.10**.

The **CBSubs Folder Access** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The **CBSubs Folder Access** integration plugin is represented in the distribution package as the **cbplug_int_plug_cbsubsfolderaccess-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_plug_cbsubsfolderaccess-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages

- Verify that a new row named **CBSubs Folder Access** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Please note that the actual protection is handled by a **.htaccess** file and a **.htpasswd** file that are created in the protected folder. Deletion of these files is not automatic (when disabling or deleting the integration plugin) and these files should be manually removed (from all previously protected folders) in case you no longer need folder protection.

This protection method should not be used to protect normal Joomla content. Normal Joomla content should be protected using other integration plugins.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbsubsfolderaccess

6.12 Installing the CBSubs™ GPL Plans Image Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to assign a plan image to your **CBSubs™ GPL** plans and automatically provision this image to a special CB plan image field (special fieldtype is created) when a user subscribes to the **CBSubs™ GPL** plan. This method is very useful to advertise your subscription membership by giving them a special image in their profile (only available to them). If you do not want to take advantage of this feature, then there is no need to install this plugin. You can always install it later if needed.

The **CBSubs Plans Image** Integration plugin is used to enable **CBSubs™ GPL** to associate an image to a plan. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.6.11**.

The **CBSubs Plans Image** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**.

The **CBSubs Plans Image** integration plugin is represented in the distribution package as the **cbplug_int_plug_cbsubsplanimage-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_plug_cbsubsplanimage-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs Plans Image** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbsubsplanimage

6.13 Installing the CBSubs™ GPL AcyMailing Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to add and/or remove users to or from AcyMailing newsletter lists automatically when a **CBSubs™** plan subscription is activated or terminated for a user. If you do not have the AcyMailing newsletter extension installed or do not want to take advantage of this feature, then there is no need to install this plugin. You can always install it later if needed.

The **CBSubs AcyMailing** Integration plugin is used to enable **CBSubs™ GPL** to add/remove users to/from AcyMailing newsletter(s) upon plan subscription/termination. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.6.12**.

The **CBSubs AcyMailing** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**.

The **CBSubs AcyMailing** integration plugin is represented in the distribution package as the **cbplug_int_cbsubsacymailing-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubsacymailing-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs AcyMailing** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user
▶ **plug_cbpaidsubscriptions ▶ cbsubsacymailing**

6.14 Installing the CBSubs™ GPL Rounded Template Plugin



Why should I install this? Do I really need this?

This *optional* CBSubs template plugin allows you to style the CBSubs plan pages (on CB registration and CB Subscriptions tab). It should be used more as a template starting point for designers wishing to style CBSubs pages for their website theme.

The ***rounded CBSubs™*** template plugin is used to style **CBSubs™ GPL** pages on CB registration page and Subscription tab contents on user profile. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.8**.

Please note that this plugin is not encrypted and it can be used as a basis for constructing addition template plugins.

The ***rounded CBSubs™ GPL*** template plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The ***rounded CBSubs™ GPL*** template plugin is represented in the distribution package as the ***cbplug_cbsubstemplate_rounded-4.1.0.zip*** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the ***cbplug_cbsubstemplate_rounded-4.1.0.zip*** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named ***rounded*** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user
▶ **plug_cbpaidsubscriptions** ▶ **templates** ▶ **rounded**

6.15 Installing the CBSubs™ GPL Content Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to protect CMS content (categories, sections, menu items, extensions, etc.) of your website. This protection is accomplished with the assistance of the **cbsubsbob** CMS plugin (see **Chapter 6.33**), which must be installed and published in order for protection to work. If you do not plan on controlling your website CMS content by **CBSubs™ GPL** plan subscription, then there is no need to install this plugin. You can always install it later if needed.

Continuing the installation of **CBSubs™ GPL** Integration plugins, we now can proceed with the installation of the **CBSubs Content** Integration Plugin.

The **CBSubs Content** Integration plugin is represented in the distribution package as the **cbplug_int_cbsubscontent-4.1.0.zip** file. This integration plugin is used to create an interface between **CBSubs™ GPL** and CMS content items (e.g., sections, categories, articles, menus, etc). More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.3.8.1**, **Chapter 7.5.6.3** and **Chapter 7.5.6.4**.

The **CBSubs Content** Integration plugin is also a CB plugin and as such should be installed following the same installation process used in **Chapter 6.3**.

To install the **CBSubs Content** integration plugin, like any other CB plugin, you need to access the CB Plugin Management backend and follow the normal CB plugin installation seven-step process.

The **CBSubs Content** integration plugin is represented in the distribution package as the **cbplug_int_cbsubscontent-4.1.0.zip** file.

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubscontent-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button

- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs Content** is added to the CB Plugin Management backend.

This process is visually depicted in **Figure 14**.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubscontent

6.16 Installation of CBSubs™ GPL SQL Actions Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to execute SQL queries against your CMS database triggered by **CBSubs™ GPL** plan subscriptions. It is extremely powerful and dangerous (unless you know exactly what you are doing). It is used to integrate with other extensions that have no **CBSubs™ GPL** integration plugin mechanism. If you do not have a specific integration need that can be satisfied with a specific SQL statement execution, then there is no need to install this plugin. You can always install it later if needed.

Continuing the installation of **CBSubs™ GPL** Integration plugins, we now can proceed with the installation of the **CBSubs SQL Actions** Integration Plugin. The **CBSubs SQL Actions** Integration plugin is represented in the distribution package as the ***cbplug_int_cbsubssqlactions-4.1.0.zip*** file. This integration plugin is used to create an interface between **CBSubs™ GPL** and the execution of SQL statements against the database of your website. It is a powerful tool that must be used with extreme caution. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.5.6.5**.

The **CBSubs SQL Actions** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**.

The **CBSubs SQL Actions** integration plugin is represented in the distribution package as the ***cbplug_int_cbsubssqlactions-4.1.0.zip*** file.

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the ***cbplug_int_cbsubssqlactions-4.1.0.zip*** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button

- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named ***CBSubs SQL Actions*** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubssqlactions

The forums on Joomlaopolis are the best place to look for and exchange SQL actions queries for integration with other Joomla extensions. Some of the SQL integrations posted are:

- AcyMailing Newsletter SQL integration (not needed anymore since integration plugin is now available)
- Acajoom Newsletter SQL integration
- Agora forum SQL integration
- SOBI2 extension SQL integration
- Mosets Tree extension SQL integration
- JoomGallery extension SQL integration

6.17 Installation of the CBSubs™ GPL iDevAffiliate Integrations Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to integrate **CBSubs™ GPL** with the iDevAffiliate commission tracking system. If you do not have the iDevAffiliate system installed (www.idevdirect.com) installed and configured, then there is no need to install this integration plugin. You can always install it later if needed.

Continuing the installation of **CBSubs™ GPL** Integration plugins, we now can proceed with the installation of the **CBSubs iDevAf** Integration Plugin. The iDevAffiliate system adds an affiliate tracking mechanism to your site. If you do not have the iDevAffiliate system (for Joomla) installed on your website, then there is no need to proceed with the installation of this integration plugin.

The **CBSubs iDevAf** Integration plugin is represented in the distribution package as the **cbplug_int_cbsubsidevaf-4.1.0.zip** file. This integration plugin is used to create an interface between the **CBSubs™ GPL** core plugin and the iDevAffiliate for Joomla system. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.3.8.3** and in **Chapter 7.5.6.8**.

The **CBSubs iDevAf** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The **CBSubs iDevAf** integration plugin is represented in the distribution package as the **cbplug_int_cbsubsidevaf-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubsidevaf-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button


- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named ***CBSubs iDevAf*** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubsidevaf

6.18 Installation of the CBSubs™ GPL PAP Integrations Plugin

	Why should I install this? Do I really need this?
<p>This <i>optional</i> integration plugin allows you to integrate CBSubs™ with the iDevAffiliate commission tracking system. If you do not have the Post Affiliate Pro system installed (www.qualityunit.com) installed and configured, then there is no need to install this integration plugin. You can always install it later if needed.</p>	

Continuing the installation of **CBSubs™ GPL** Integration plugins, we now can proceed with the installation of the **CBSubs PostAfPro** Integration Plugin. The Post Affiliate Pro system adds affiliate-tracking mechanism to your site. If you do not have the Post Affiliate Pro system (for Joomla) installed on your website, then there is no need to proceed with the installation of this integration plugin.

The **CBSubs PostAfPro** Integration plugin is represented in the distribution package as the **cbplug_int_cbsubspostafpro-4.1.0.zip** file. This integration plugin is used to create an interface between **CBSubs™ GPL** and the Post Affiliate Pro for Joomla system. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.3.8.2** and in **Chapter 7.5.6.7**.

The **CBSubs PostAfPro** Integration plugin is also a CB plugin and as such should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**.

The **CBSubs PostAfPro** integration plugin is represented in the distribution package as the **cbplug_int_cbsubspostafpro-4.1.0.zip** file and should be installed following these steps:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubspostafpro-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button

- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs PostAfPro** is added to the CB Plugin Management backend.

Regarding the actual Post Affiliate Pro settings needed for **CBSubs™ GPL** integration to properly interface with the tracking system, the following items must be configured:

- PAP4 > Configuration > Tracking Settings
URL: <http://www.example.com/index.php>
Track referrals by IP address: un-checked
Affiliate linking method: Standard links (redirect)
- PAP4 > Configuration > Cookies
Cookie domain: .example.com
(try .example.com first and example.com if this fails)
Overwrite cookie: checked
Delete cookie after lead / sale: checked
- Configuration > Features > Recurring Commissions > Configure
Use API to trigger commissions: CHECKED
Without the above recurring commissions will not work.

Some relevant PAP4 screenshots are provided in **Figure 15** through **Figure 18**.

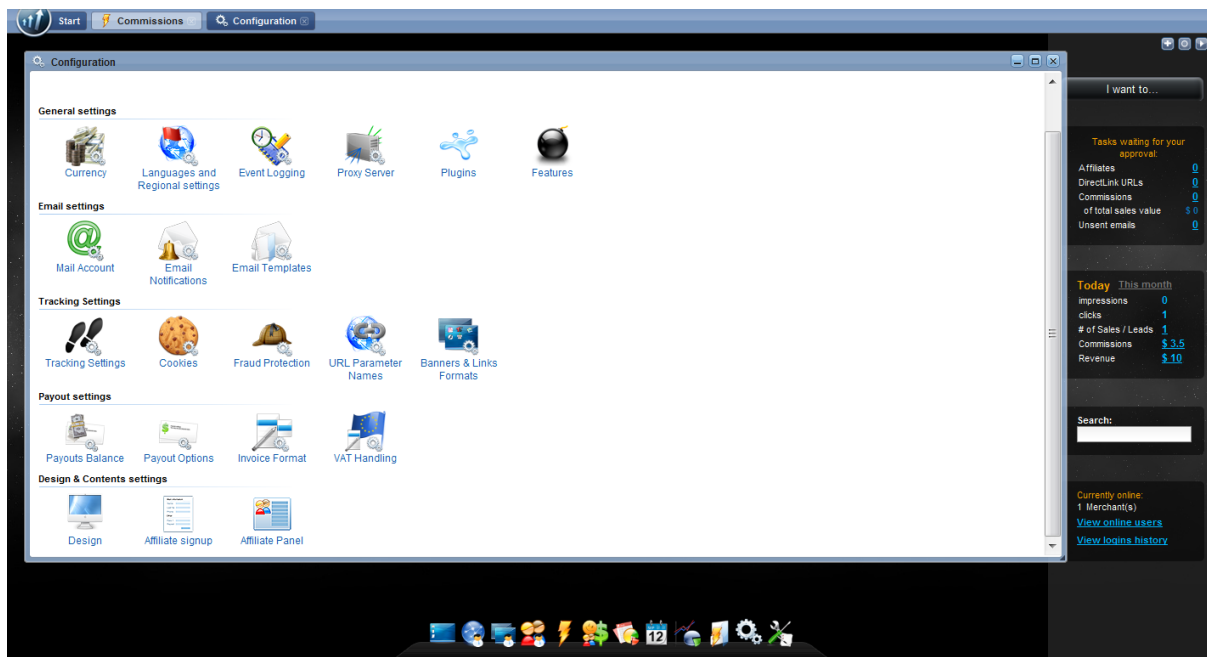


Figure 15: PAP Configuration page

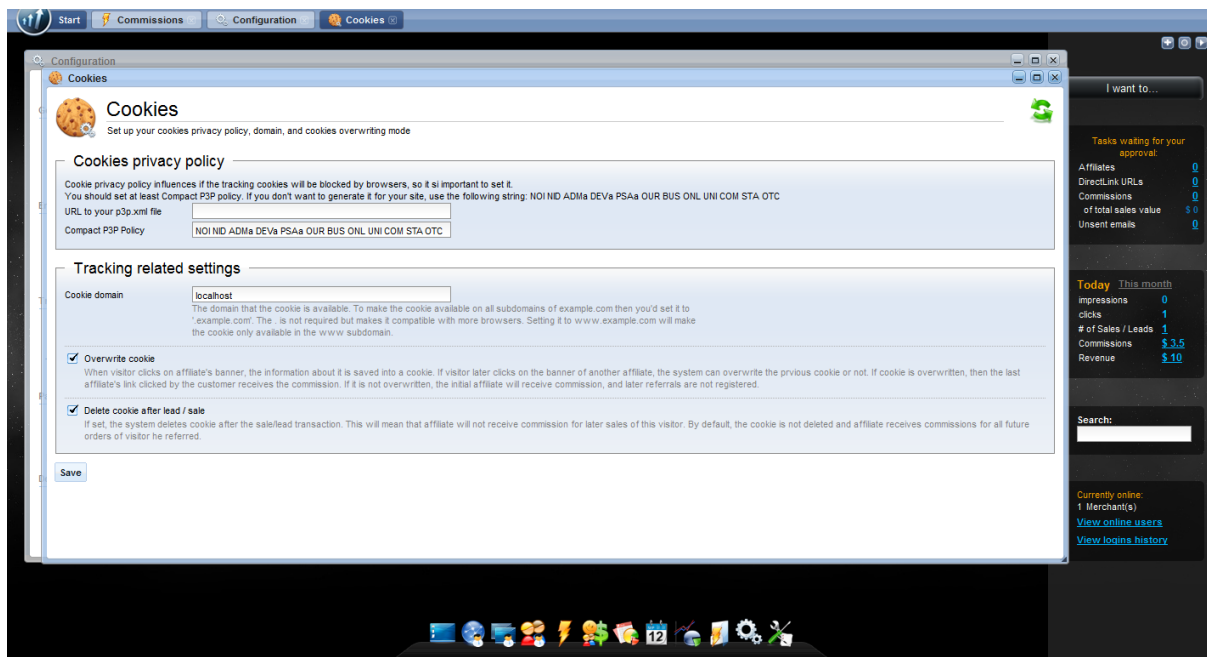


Figure 16: PAP4 Cookies configuration

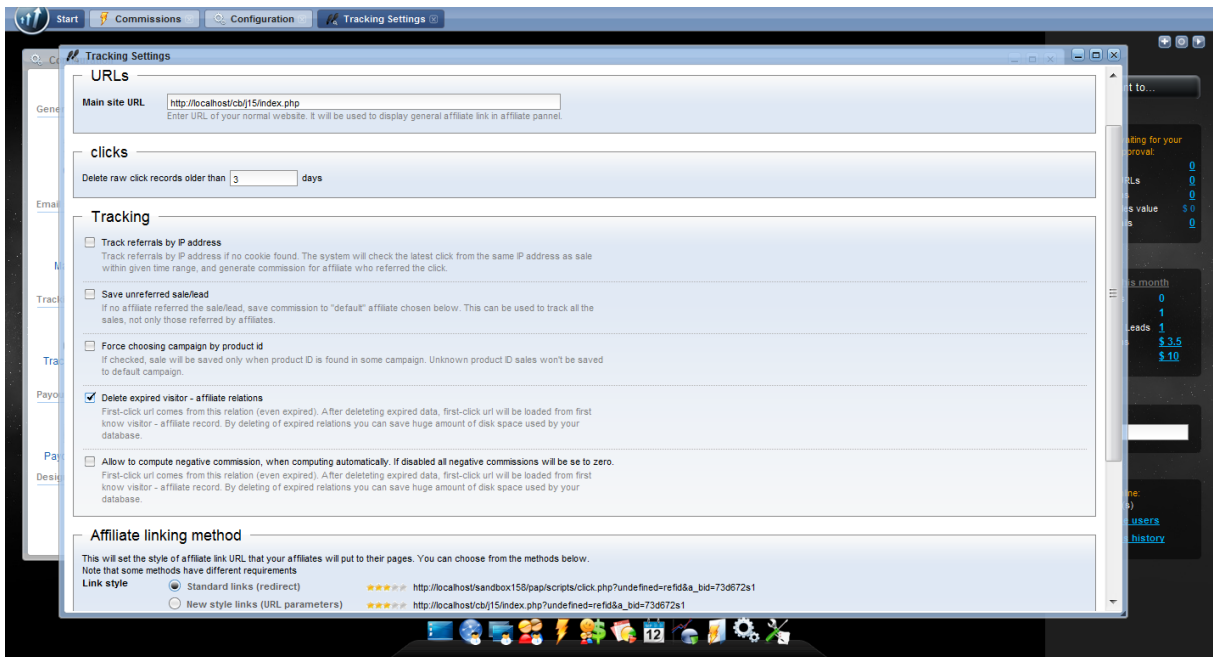


Figure 17: PAP Tracking Settings

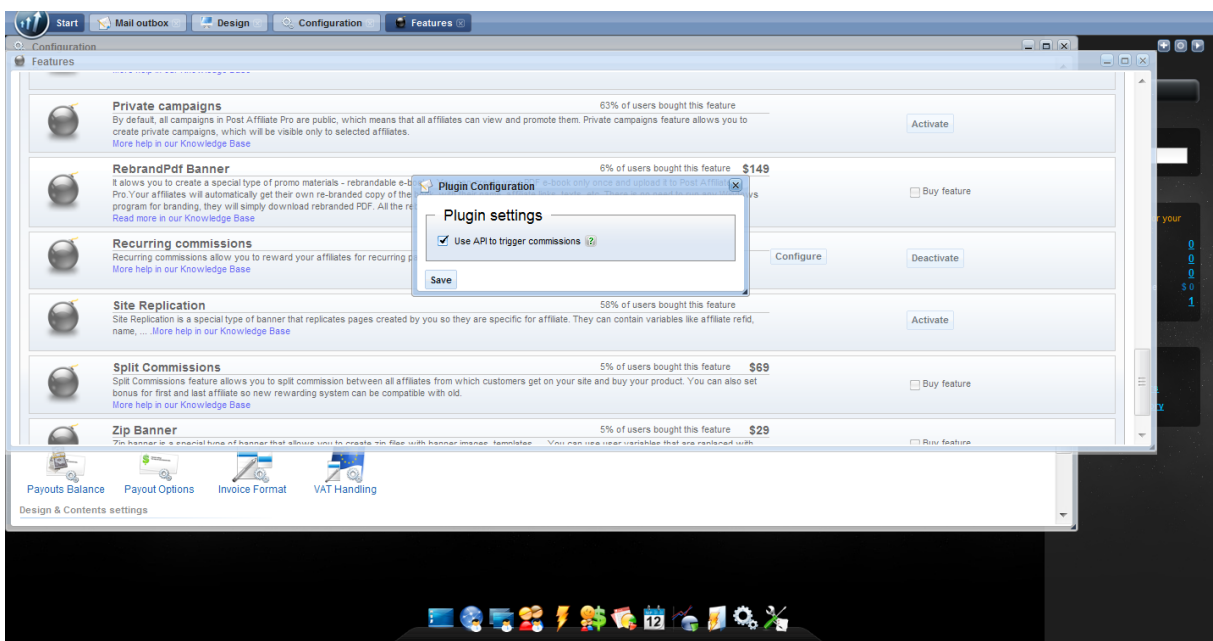


Figure 18: PAP Recurring Commissions setting

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶

plug_cbpaidsubscriptions ▶ plugin ▶ cbsubspostafpro

6.19 Installation of CBSubs™ GPL English Language Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to change the English (default) **CBSubs™ GPL** language strings to your liking. **CBSubs™ GPL** by default using English sentences in front-end and back-end. If you do not like these default wordings, then you must install this plugin and make changes to the strings as needed. You can always install it later if needed. **CBSubs™ GPL** language plugin alterations are described in **Chapter 16**.

In addition to the integrations plugin, we can also install **CBSubs™ GPL** Language plugin packages.

A CBSubs GPL language plugin can be downloaded from the Language download area on JoomlaPolis:

<https://www.joomlapolis.com/cb-solutions/languages>

On this page select the CBSubs Language forge area link to access the English and other language plugins for CBSubs.

The English language plugin can be downloaded directly from this page:

<https://forge.joomlapolis.com/projects/lan-cbsubs-en/files>

If your language plugin does not exist or is incomplete you can help translating it by joining (or starting) the relevant Transifex language project:

<https://www.transifex.com/projects/p/cbsubs/>

You can install a CBSubs language package (and edit it to your liking) or use it as a template to create your own language package.

You should check on the **CBSubs™ GPL** support forums for available **CBSubs™** language plugins.

A CBSubs language plugin is also a CB plugin and as such should be installed following the same seven step installation process used in **Chapter 6.3**.

Please note that a language plugin is automatically enabled (published) during its installation process.

The language plugin should be installed if you want to modify the default wordings of **CBSubs™ GPL** as described in **Chapter 16.1**. You can also use this language plugin as a template to create your own language plugin as described in **Chapter 16.2**.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ lanuage ▶
cbpaidsubscriptions-en-GB

6.20 Installation of CBSubs™ GPL Tax Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to handle sales taxes within **CBSubs™ GPL**. The **CBSubs™ GPL** tax plugin will add a new icon area section to your main **CBSubs™ GPL** panel and underlying functionality will be integrated in your **CBSubs™ GPL** plans. You can always install it later if needed. Please note that installation of this plugin is also required if you intend to install and use the **CBSubs Promotion** plugin (discussed in **Chapter 6.21**) and the **CBSubs Mailer** plugin (discussed in **Chapter 6.22**).

Continuing the installation of **CBSubs™ GPL** Integration plugins, we now can proceed with the installation of the **CBSubs Tax** Integration Plugin. This plugin adds sales tax handling processes to your **CBSubs™ GPL** installation.

The **CBSubs Tax** Integration plugin is represented in the distribution package as the **cbplug_int_cbsubstax-4.1.0.zip** file. This integration plugin is used to add sales tax functionality in your **CBSubs™ GPL** environment. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.3.4** and in **Chapter 7.16**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubstax-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs Tax** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubstax

Also, you should see a new Tax tab in your Setting icon area as discussed in **Chapter 7.3.4** and illustrated in **Figure 51**. Also there will be an extra Tax Settings icon area added to your **CBSubs™ GPL** main panel as discussed in **Chapter 7.16** and a new Tax tab in your **CBSubs™ GPL** plans area as discussed in **Chapter 7.5.3**.

6.21 Installation of CBSubs™ GPL Promotions Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to handle smart promotions within **CBSubs™ GPL**. The **CBSubs Promotion** plugin will add a new icon area section to your main **CBSubs™ GPL** panel. You can always install it later if needed. Please note that this “Smart Promotions” feature in addition to the installation of this integration plugin also requires the installation and publishing of the **CBSubs Tax** plugin (see **Chapter 6.20**).

The **CBSubs Promotion** Integration plugin is represented in the distribution package as the **cbplug_int_cbsubspromotion-4.1.0.zip** file. This integration plugin is used to add smart promotions functionality in your **CBSubs™ GPL** environment. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.17**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:


- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubspromotion-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs Promotion** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubspromotion

6.22 Installation of CBSubs™ GPL Mailer Plugin

	Why should I install this? Do I really need this?
<p>This <i>optional</i> integration plugin allows you to create and manage personalized email messages to CBSubs™ GPL subscribers based on specific time sensitive conditions.</p> <p>You can create powerful marketing messages that are automatically queued and emailed in a timely fashion to CBSubs™ GPL subscribers.</p> <p>The CBSubs Mailer plugin will add a new icon area section to your main CBSubs™ GPL panel. You can always install it later if needed.</p>	

The **CBSubs Mailer** Integration plugin is represented in the distribution package as the **cbplug_int_cbsubsmailer-4.1.0.zip** file. This integration plugin is used to add automated emailing functionality in your **CBSubs™ GPL** environment. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.3.7** and **Chapter 7.18**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_int_cbsubsmailer-4.1.0.zip** package contained in your locally decompressed distribution package, select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CBSubs Mailer** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ plugin ▶ cbsubsmailer

6.23 Installation of 2Checkout Payment Gateway Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to configure a **2Checkout** payment gateway within **CBSubs™ GPL**. The **2Checkout** plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should install this if you intend to use **2Checkout** as one of your payment organizations. You can always install it later if needed.

The 2Checkout Integration plugin must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** download area on JoomlaPolis. The package is typically named **cbplug_processor_twocheckout-4.1.0.zip** (version number may vary). This integration plugin is used to add **2Checkout** payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.3**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_twocheckout-4.1.0.zip** package that you downloaded separately from the **CBSubs™ GPL** download area of JoomlaPolis (as it's not part of the main **CBSubs™ GPL** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **2Checkout** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ 2checkout

6.24 Installation of CCBill Payment Gateway Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to configure a **CCBill** payment gateway within **CBSubs™ GPL**. The **CCBill** plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should install this if you intend to use **CCBill** as one of your payment organizations. You can always install it later if needed.

The **CCBill** Integration plugin is package is named **cbplug_processor_ccbill-4.1.0.zip** file (version number may vary) and must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** Download area on JoomlaPolis. This integration plugin is used to add CCBill payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.8**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:


- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_ccbill-4.1.0.zip** package that you downloaded separately from the CBSubs download area of JoomlaPolis (not part of the main **CBSubs™ GPL** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CCBill** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ ccbill

6.25 Installation of Payza Payment Gateway Integration Plugin

	Why should I install this? Do I really need this?
<p>This <i>optional</i> integration plugin allows you to configure an Payza payment gateway within CBSubs™ GPL. The Payza plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should install this if you intend to use Payza as one of your payment organizations. You can always install it later if needed.</p> <p><u>Note:</u> This payment organization was formerly known as AlertPay. If you had previously configured AlertPay you will need to install the new Payza gateway and reconfigure.</p>	

The **Payza** Integration plugin is represented as the **cbplug_processor_payza-4.1.0.zip** file (version number may vary) and must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** Download area on Joomlaopolis. This integration plugin is used to add **Payza** payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.9**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_payza-4.1.0.zip** package that you downloaded separately from the **CBSubs™ GPL** download area of Joomlaopolis (not part of the main **CBSubs™ GPL** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **Payza** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ alertpay

6.26 Installation of Quickpay Payment Gateway Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to configure a **Quickpay** payment gateway within **CBSubs™ GPL**. The **Quickpay** plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should install this if you intend to use **Quickpay** as one of your payment organizations. You can always install it later if needed.

The **Quickpay** Integration plugin is represented as the **cbplug_processor_quickpay-4.1.0.zip** file (version number may vary) and must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** Download area on Joomla!polis. This integration plugin is used to add **Quickpay** payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.10**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_quickpay-4.1.0.zip** package that you downloaded separately from the **CBSubs™ GPL** download area of Joomla!polis (not part of the main **CBSubs™ GPL** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **Quickpay** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ quickpay

6.27 Installation of Moneris eSELECTplus Payment Gateway Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to configure a **Moneris eSELECTplus** payment gateway within **CBSubs™ GPL**. The **Moneris eSELECTplus** plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should only install this if you intend to use **Moneris eSELECTplus** as one of your payment organizations. You can always install it later if needed.

The **Moneris eSELECTplus** Integration plugin is represented as the **cbplug_processor_moneriseselectplus-4.1.0.zip** file (version number may vary) and must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** Download area on Joomla!polis. This integration plugin is used to add **Moneris eSELECTplus** payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.11**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:


- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_moneriseselectplus-4.1.0.zip** package that you downloaded separately from the **CBSubs™** download area of Joomla!polis (not part of the main **CBSubs™** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **Moneris eSELECTplus** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ moneriseselectplus

6.28 Installation of Worldpay Payment Gateway Integration Plugin

	Why should I install this? Do I really need this?
<p>This <i>optional</i> integration plugin allows you to configure a Worldpay payment gateway within CBSubs™ GPL. The Worldpay plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should install this if you intend to use Worldpay as one of your payment organizations. You can always install it later if needed.</p>	

The **Worldpay** Integration plugin is represented as the **cbplug_processor_worldpay-4.1.0.zip** file and must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** Download area on Joomlapolis. This integration plugin is used to add **Worldpay** payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.12**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_worldpay-4.1.0.zip** package that you downloaded separately from the **CBSubs™ GPL** download area of Joomlapolis (not part of the main **CBSubs™ GPL** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **Worldpay** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ worldpay

6.29 Installation of CIC Credit Mutuel Payment Gateway Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to configure a **CIC Credit Mutuel** payment gateway within **CBSubs™ GPL**. The **CIC Credit Mutuel** plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should install this if you intend to use **CIC Credit Mutuel** as one of your payment organizations. You can always install it later if needed.

The **CIC Credit Mutuel** Integration plugin is represented as the **cbplug_processor_ciccreditmutuel-4.1.0.zip** file and must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** Download area on Joomlapolis. This integration plugin is used to add **CIC Credit Mutuel** payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.13**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_ciccreditmutuel-4.1.0.zip** package that you downloaded separately from the **CBSubs™ GPL** download area of Joomlapolis (not part of the main **CBSubs™ GPL** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **CIC Credit Mutuel** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ ciccreditmutuel

6.30 Installation of TeleMoney EasyPay Payment Gateway Integration Plugin



Why should I install this? Do I really need this?

This *optional* integration plugin allows you to configure a **TeleMoney EasyPay** payment gateway within **CBSubs™ GPL**. The **TeleMoney EasyPay** plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should install this if you intend to use **TeleMoney EasyPay** as one of your payment organizations. You can always install it later if needed.

The **TeleMoney EasyPay** Integration plugin is represented as the **cbplug_processor_telemonyeasypay-4.1.0.zip** file and must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** Download area on JoomlaPolis. This integration plugin is used to add **TeleMoney EasyPay** payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.14**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:


- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_telemonyeasypay-4.1.0.zip** package that you downloaded separately from the **CBSubs™ GPL** download area of JoomlaPolis (not part of the main **CBSubs™** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **TeleMoney EasyPay** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ telemoneyeasypay

6.31 Installation of Eway Payment Gateway Integration Plugin

	Why should I install this? Do I really need this?
<p>This <i>optional</i> integration plugin allows you to configure an Eway payment gateway within CBSubs™ GPL. The Eway plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should install this if you intend to use Eway as one of your payment organizations. You can always install it later if needed.</p>	

The **Eway** Integration plugin is represented as the **cbplug_processor_eway-4.1.0.zip** file and must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** Download area on JoomlaPolis. This integration plugin is used to add **Eway** payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.15**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:


- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_eway-4.1.0.zip** package that you downloaded separately from the **CBSubs™ GPL** download area of JoomlaPolis (not part of the main **CBSubs™ GPL** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **Eway** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ eway

6.32 Installation of PayPal Pro Payment Gateway Integration Plugin

	Why should I install this? Do I really need this?
<p>This <i>optional</i> integration plugin allows you to configure an PayPal Pro payment gateway within CBSubs™ GPL. The PayPal Pro plugin, when installed and published, will add a new drop-down option to the Create New Gateway link in the Payment Gateway icon area. You should install this if you intend to use PayPal Pro as one of your payment organizations. You can always install it later if needed.</p>	

The **PayPal Pro** Integration plugin is represented as the **cbplug_processor_paypalpro-4.1.0.zip** file and must be downloaded separately (see **Chapter 5.2**) from the **CBSubs™ GPL** Download area on Joomlapolis. This integration plugin is used to add **PayPal Pro** payment organization support in our **CBSubs™ GPL** Payment Gateway icon area. More about the actual extra functionality surrounding this integration plugin can be found in **Chapter 7.4.16**. It should be installed following the same seven-step installation process used in **Chapter 6.3** and illustrated in **Figure 14**. The steps again are:

- Go to the CB Plugin Management backend
- Click on the [Install Plugin](#) link on the top
- Click on the **Browse...** button
- Locate the **cbplug_processor_paypalpro-4.1.0.zip** package that you downloaded separately from the **CBSubs™ GPL** download area of Joomlapolis (not part of the main **CBSubs™ GPL** distribution package), select it and click the **Open** button
- Click on the **Upload File & Install** button
- Verify that the installation process was successful by reading the completion messages
- Verify that a new row named **PayPal Pro** is added to the CB Plugin Management backend.

If for some reason you have encountered any type of problem in following this process or if something went wrong along the way, you should open a support ticket at the **CBSubs™ GPL** official website.

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ components ▶ com_comprofiler ▶ plugin ▶ user ▶
plug_cbpaidsubscriptions ▶ processors ▶ paypalpro

6.33 Installation of the CBSubs™ GPL Content Protection Plugin



Why should I install this? Do I really need this?

This CMS plugin (previously known as mambot) is needed if your website intends to protect CMS content via **CBSubs™ GPL** subscription plans. Without this CMS plugin, **CBSubs™ GPL** will not be able to enforce any content protection imposed by the **CBSubs Content** integration plugin (see **Chapter 6.15** and **Chapter 7.5.6.3**).

Now that we have finished the installation of the core **CBSubs™ GPL** plugin and all the **CBSubs™ GPL** Integration plugins (along with the language plugin if needed), we may proceed with the installation of a CMS plugin (formerly known as a mambot) called **CBSubs™ GPL** Content Protection Plugin.

The **cbsubshot** Content Protection plugin is represented in the distribution package as the **joomlapiugin_cbpaidsubshot-4.1.0.zip** file. This CMS plugin should be installed following the procedure recommended by your CMS system.

A visual illustration regarding the installation of this CMS plugin (mambot) is shown in **Figure 19**. As with the previous installations, there is no need to publish/enable these sub systems yet – we will be addressing enabling all these in the following chapters.

Please note that if you do not desire to protect CMS content (section articles, category articles, menus, extensions, etc) there is no need to install the **cbsubshot** Content Protection plugin. However, we believe that this functionality is core for **CBSubs™ GPL** so you will most likely want to take advantage of it.

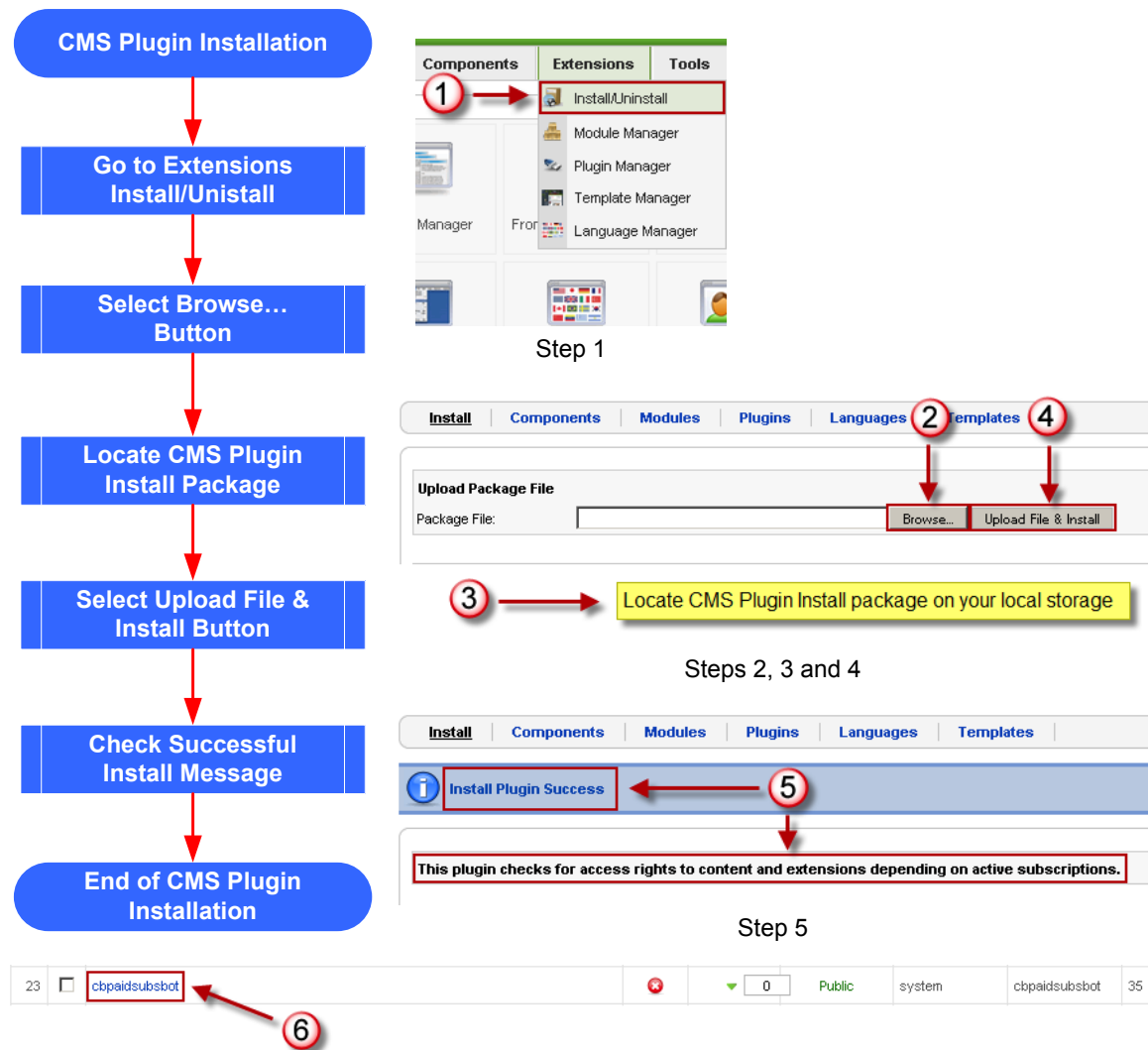


Figure 19: Installation of the CBSubs™ GPL Content Protection Plugin

Once properly installed, the following folder will be added to your installation:

[root folder] ► plugins ► system ►
cbpaysubbot.xml, cbpaysubbot.php

After the installation successful installation you should also see the following message:

This plugin checks for access rights to content and extensions depending on active subscriptions. Also provides content.prepare usage for displaying CBSubs plan and subscription information.

Format: [cbsubs:plans plan="#" /] and [cbsubs:subscriptions plan="#" /]. Additional formation options include
output="basket|url|name|alias|description|duration|price_registration|price_upgrade|price_renewal|price|rate|first_rate" (plans),
output="validity|validity_remaining|expiry_date|signup_date|last_renewal_date" (subscriptions), and status="A|R|X|C|U|I".


Content can also be conditioned based off subscription status.

Format: [cbsubs:if plan="#"]CONTENT[/cbsubs:if]. Additional condition options include status="A|R|X|C|U|I" and since="7 DAYS".

Multi-plan URLs can also be directly output.

Format: [cbsubs:url plans="#" /]. Additional formation options include
output="basket|plans"

6.34 Installation of the CBSubs™ GPL Module

	Why should I install this? Do I really need this?
<p>This CMS module is needed if you wish to highlight for your members information about their current subscription and their available upgrade options. It is a nice marketing tool that should help you persuade your members to upgrade their plans. It is not necessary for CBSubs™ GPL to operate and may be installed at some later time if desired.</p>	

The last thing left to do is to install the **CB Subscriptions** module. This is a CMS module that integrates with the **CBSubs™ GPL** system and is used as a marketing tool to promote and solicit new subscriptions or upgrading.

The **CB Subscriptions** module is represented in the distribution package as the ***mod_cbsubscriptions-4.1.0.zip*** file. This is a CMS module and should be installed according to the process outlined by your CMS.

A visual illustration regarding the installation of this CMS module is shown in Figure 20. As with the previous installations, there is no need to publish/enable these sub systems yet – we will be addressing enabling all these in the next chapter.

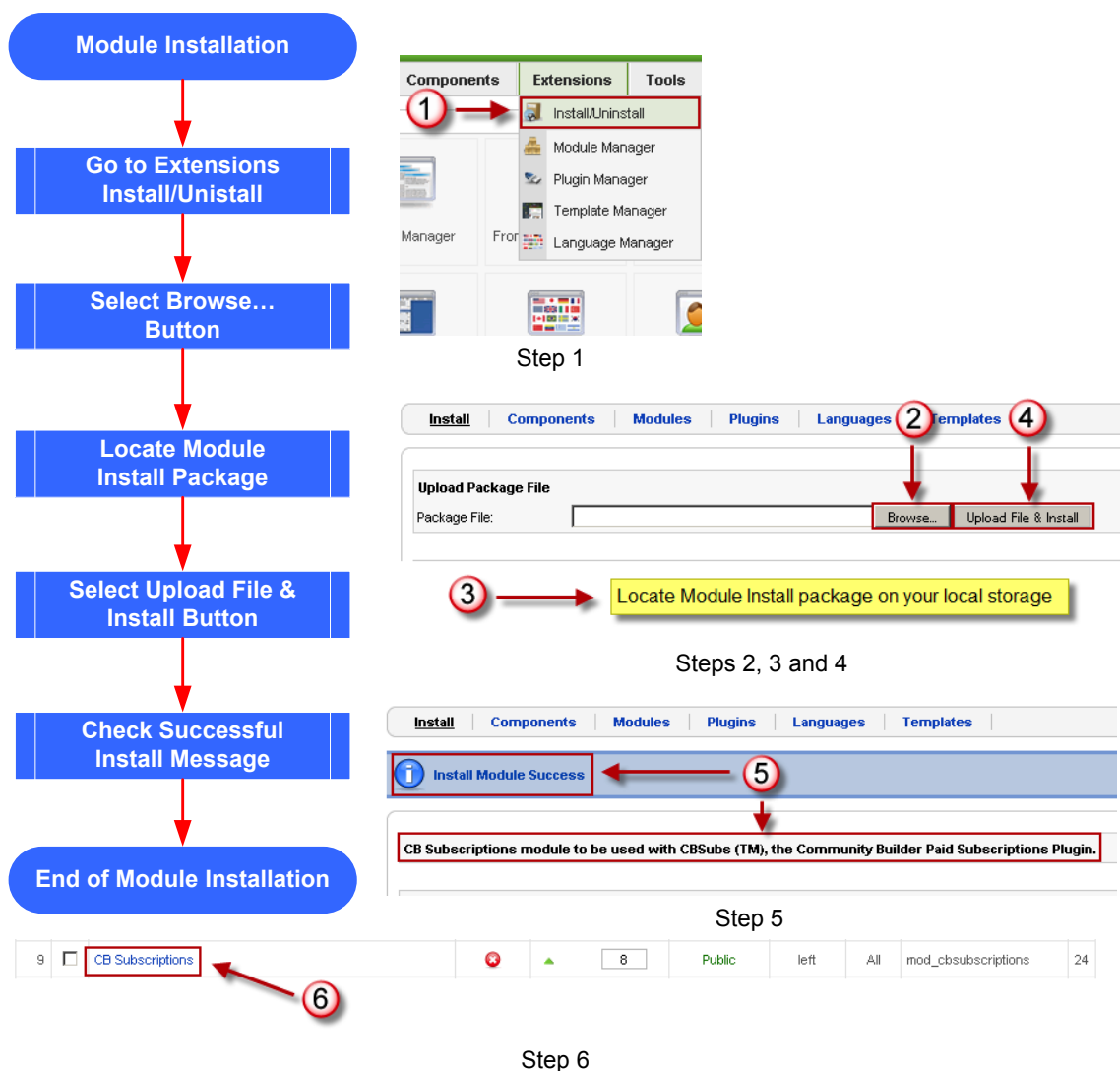


Figure 20: Installation of the CBSubs™ GPL Module

Once properly installed, the following folder will be added to your installation:

[root folder] ▶ modules ▶
mod_cbsubscriptions

6.35 Enabling the Installed CBSubs™ GPL Plugins

Now that we have finally completed the various installation steps we will see all the new **CBSubs™ GPL** plugins (excluding the English language plugin that was automatically enabled-published during installation) installed. These plugins are not enabled (published) and have a red **X** in the relevant column as illustrated in **Figure 21**.



18	<input type="checkbox"/>	CB Paid Subscriptions	✓	✗	▲		99	Public	user	cbpaidsubscriptions
19	<input type="checkbox"/>	CPay CB Field	✓	✗	▼		99	Public	user/plugin_cbpaidsubscriptions/plugin	cpaycbfield
20	<input type="checkbox"/>	CPay CB SQL actions	✓	✗	▲	▼	99	Public	user/plugin_cbpaidsubscriptions/plugin	cpaycbsqlactions
21	<input type="checkbox"/>	CPay Content	✓	✗	▲	▼	99	Public	user/plugin_cbpaidsubscriptions/plugin	cpaycontent
22	<input type="checkbox"/>	CPay DocMAN	✓	✗	▲	▼	99	Public	user/plugin_cbpaidsubscriptions/plugin	cpaydocman
23	<input type="checkbox"/>	CPay iDevAf	✓	✗	▲		99	Public	user/plugin_cbpaidsubscriptions/plugin	cpayidevaf

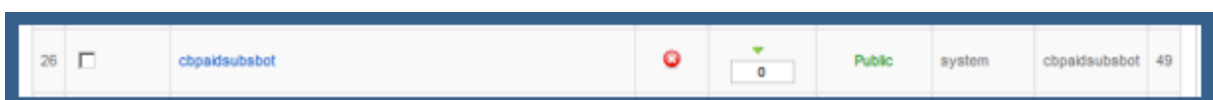
Figure 21: Enabling the Installed CBSubs™ GPL CB Plugins

To enable these plugins we can just click on each red **X** and the relevant CB plugin will be published. We can also just click on all the check boxes and then click on the Publish button in the **CB Plugin Management** button strip (top of your screen).

6.36 Enabling the CBSubs™ GPL Content Protection Plugin

We installed the **CBSubs™ GPL** Content Protection plugin as a CMS plugin (mambot) during the steps we described in **Chapter 6.33**. During the installation process we did not publish this mambot.

In your Joomla environment, we should be able to see the unpublished (not-enabled) plugin by selecting the Extensions -> Plugin Manager Menu from the administration backend of your site as shown in **Figure 22**.



26	<input type="checkbox"/>	cbpaidsubbot		✗	▼	0	Public	system	cbpaidsubbot	49
----	--------------------------	--------------	--	---	---	---	--------	--------	--------------	----

Figure 22: The unpublished CBSubs™ GPL Content Protection Plugin

You should be able to publish (enable) the plugin by clicking on the red **X** – this will toggle the status and enable the plugin.

This Joomla plugin does much more than protect content access requiring active subscriptions. It also acts as a content plugin that lets you display CBSubs related plan/subscription information in your Joomla content and lets you define when specific content is to appear.

Here are 2 examples:

- Upgrade to our plan [cbsubs:plans plan="1" output="name" /]
for just [cbsubs:plans plan="1" output="price" /] now!
- [cbsubs:if plan="1" status="A" since >= "1 week" and plan="1"
status="A" since <= "2 week"]
This only shows up between 1st and 2nd week of your
subscription
[/cbsubs:if]

6.37 Enabling the CBSubs™ GPL Module

We installed the **CBSubs™ GPL** CMS module during the steps we described in **Chapter 6.34**. During the installation process we did not publish this module. In your Joomla environment, we should be able to see the unpublished (not-enabled) plugin by selecting the **Extensions → Module Manager** Menu from the administration backend of your site as shown in **Figure 22**.

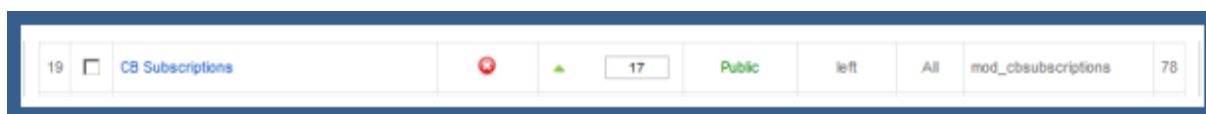


Figure 23: The unpublished CB Subscriptions Module

You should be able to publish (enable) the module by clicking on the red **X** – this will toggle the status and enable the module.

7 Configuring the System

Now that we have installed and enabled all elements of the **CBSubs™ GPL** system, we can start getting acquainted with the new environment and explore the numerous settings and possibilities.

7.1 Our First Look at the Payment Center

Clicking on the **CB Paid Subscriptions** item in the CB Plugin Management backend will reveal the main panel of our newly installed and published system. This is called the Payment Center. This is shown in **Figure 24**. Please note that depending on if you have installed or not the **CBSubs Tax** plugin the Tax extra icon area will appear or not as the last icons shown.

At first glance we should take note of the following (the numbers used in this list are also placed in the screenshot given in **Figure 24**):

1. Notice that our Payment Center informs us about the latest available version of the **CBSubs™ GPL** core plugin in comparison with our installed version. We should always pay attention to this message and if there is a newer version than the one installed on our website, we should immediately visit the **CBSubs™ GPL** website and assess the situation. In many cases, new releases address security issues, which must be addressed as soon as possible.
2. Right after the latest version check and the license message, we see the 'Last 7 days payments' area. This area shows all activities that took place within the last 7 days. It even dynamically produces a graph charting this activity so we can have a nice visual view of what has been happening with our commercial activities.
3. The Settings icon is the very first area you should visit and make sure all prerequisites are green for you reinstallation.
4. In the Subscriptions icon we see that our subscriptions system has tied into our current CB environment and is showing us that 1 active subscriptions

(understandably, since you have just installed your system and have no activity yet you should see 0 active subscriptions here) are present and that we have 3 active registrations. These registrations are picked up from your CB User Management backend by summing up all existing registered members (only the ones that are active – enabled).

The screenshot shows the Joomla! 3.0.2 Community Builder Paid Subscriptions Payments Center interface. The top navigation bar includes links for System, Users, Menus, Content, Components, Extensions, Help, Community Builder, Paid Subscriptions, and GroupJive. The main header displays "Joomla! CB Paid Subscriptions: Payments Center" and "Super User".

On the left, a sidebar menu lists: User Management, Tab Management, Field Management, List Management, Plugin Management, Tools, and Configuration.

The main content area is titled "Payments Center" and includes a message: "You have the latest version 3.0.0." (marked with a yellow '1'). Below this is a section titled "Last 7 days payments" (marked with a yellow '2'), which contains a table with columns: Paid on, Transactions, Completed, Pending, New Registrations, Upgrades, Renewals, and Graph. The table shows "Display # 7" and navigation buttons: "<< Start", "< Prev", "Next >", and "End >>".

The "Main menu" section states: "You can view current status in the buttons, and click on the buttons for details and to manage paid subscriptions." It features a grid of buttons with icons and statistics:

- Settings** (gear icon): 1 active setting.
- Payment Gateways** (bank icon): 4 enabled gateways, 3 gateways in testmode.
- Plans** (clock icon): 2 published plans.
- Subscriptions** (person icon): 1 active subscriptions, 3 active registrations (marked with a yellow '4').
- Baskets** (shopping cart icon): 2 completed orders, 0 payments pending.
- Payments** (document icon): 0 completed payments, 0 in last 7 days.
- Notifications** (screen icon): 1 notifications today, 0 IPN notifications.
- Currencies** (currency symbols): USD 1.32 / EUR 1.00, Last updated 2012-12-24.
- Statistics** (piggy bank icon): 2 sales last 7 days, 0 sales the 7 days before.
- Merchandise** (cube icon): 0 merchandise items sold.
- Donations** (hand icon): 0 donations received.
- Import** (person icon): 0 imports today.
- History Logs** (cassette icon): 49 records today, 0 error logs today.
- Sales Tax / VAT** (calculator icon): 2 tax rules, 1 published tax rates.
- Promotions** (percent sign icon): 1 active promotions, 0 promotions uses.
- Mailer** (envelope icon): 0 active auto-messages, 0 messages sent.

At the bottom, it shows "Just expired subscriptions / baskets: 0 / 0".

Footer text: "CBSubs™ paid subscriptions Community Builder™ plugin is commercially licensed software under the GPLv2. Copyright © 2007-2012 and Trademark of Lightning MultiCom SA, Switzerland - www.joomlapolls.com - and its licensors. Disclaimer: This software comes "as is" with no guarantee for accuracy, function or fitness for any purpose. All recorded items should be double-checked against payment organization transactions."

Figure 24: First Glance at the Payment Center (without Tax, Promotions and Mailer plugins)

As we can see there are many things happening and we need to dig into learning what we can do with this system. You will also see that the CB Paid Subscriptions

plugin has added some extra functionality to our CB User Management backend. You should be able to easily identify a new column in the summary view and also an extra drop-down filter that will allow you to filter your users based on subscription plans. The CB User Management additions are illustrated in **Figure 9**.

7.2 Main Menu Icons

It's time to take a closer look at all the icons present in the Main Menu area of our Payment Center. There are 16 (sixteen) main menu icons present³. Some of these we will visit only when we want to make changes to our offerings and some of them are purely related with daily operational issues.

Let's take a closer look at each one of these using the numbering scheme illustrated in **Figure 25**. We have the following Main menu icons:

1. **Settings** icon.

This icon takes us to the main settings of our **CBSubs™ GPL** system. It is most likely the first area we need to visit and start configuring its parameters. This area contains all the general-purpose settings needed by the system. We will be digging into this area and its parameterization in **Chapter 7.3**.

For now all we need to know is that in this area we give our license information, verify environmental prerequisites (CURL, OpenSSL, etc), keep track of our license credits, provide settings for some global registration processes, renewal and upgrade global settings, currency preferences, global display messaging for various activities, and general credit card processing preferences.

2. **Payment Gateways** icon.

This icon is used to add and configure our payment gateways. A payment gateway is used to process payments in cooperation with some external payment handling organization. Currently, the **CBSubs™ GPL** system supports the following external payment organizations:

³ If the optional **CBSubs Tax**, **CBSubs Promotion** and **CBSubs Mailer** plugins are installed.

- PayPal (www.paypal.com)
- Authorize.Net (www.authorize.net)
- Swiss PostFinance (www.postfinance.ch/yellowpay)
- Ogone (www.ogone.com)
- 2Checkout (www.2checkout.com - separate install, see **Chapter 6.23**)
- CCBill (www.ccbill.com – separate install, see **Chapter 6.24**)
- Alertpay (www.alertpay.com separate install, see **Chapter 6.25**)
- Quickpay (www.quickpay.net separate install, see **Chapter 6.26**)
- Moneris eSELECTplus (www.electplus.ca separate install, see **Chapter 6.27**)
- Worldpay (www.woldpay.com separate install, see **Chapter 6.28**)
- CIC Credit Mutuel (<https://www.cmcicpaiement.fr/fr/index.html> - separate install, see **Chapter 6.29**)
- Telemoney EasyPay (www.telemoneyworld.com - separate install, see **Chapter 6.30**)
- Eway (www.eway.com.au - separate install, see **Chapter 6.31**)
- Paypal PRO (separate install, see **Chapter 6.32**)

Note that you are not allowed to do anything with this area if you have not properly configured your settings in the **Settings** icon area. We will discuss more about payment gateways and this icon in **Chapter 7.4**.

3. **Plans** icon.

This icon is used to create and maintain subscription or donation plans. A “subscription” plan is the basis of our commercial policy. A plan is used to describe what we are selling (content, downloads, functionality, etc), for how long (hours, days, months, etc) and for how much (currency). We will be discussing this important topic in detail in **Chapter 7.5**.

4. **Subscriptions** icon.

This icon takes us to an area where we can track and monitor our membership subscriptions. It is basically an operations area where we track and follow current statuses of our subscriptions. We will be looking into this area in detail

in **Chapter 7.6**.

5. **Baskets** icon.

This icon reveals an area used to track baskets. A payment basket is an invoice to the user. This is also an operations area and will be described in detail later on in **Chapter 7.7**.

6. **Payments** icon.

This icon also reveals an operational area that is used to track “completed” payments. We will be looking into this area in detail in **Chapter 7.8**.

7. **Notifications** icon.

This icon takes us to an operational area used to track notifications sent by or expected by the payment organization (PayPal at the moment). We will be looking closer at this area in **Chapter 7.9**.

8. **Currencies** icon.

This icon takes us to the currency exchange rates table which is maintained by the Subscriptions system by accessing a service provided by the Central European bank. This area is basically activated once we select our basic and secondary currencies in our **Settings** icon area. This area is discussed in **Chapter 7.10**.

9. **Statistics** icon.

This icon takes us to the statistics area of our subscriptions system. We will be discussing this functionality in **Chapter 7.11**.

10. **Merchandise** icon.

This icon takes reveals the “merchandise” tracking area.

11. **Donations** icon.

This icon reveals the “donations” tracking area. A donation is defined as a special type of a plan and it is tracked in this area. We will discuss this area in

Chapter 7.13.

12. **Import** icon.

This area allows us to import existing subscriptions from a comma delimited file. We use this functionality to migrate an existing subscriptions set into our newly installed subscriptions system. We will be discussing this in detail in **Chapter 7.14.**

13. **History Logs** icon.

This area is used to view the various logs generated by the Subscriptions system. It is very useful to debug any issues or events generated by the subscriptions system. We will be discussing this in **Chapter 7.15.**

14. **Tax settings** icon.

This area (and icon) is only available if you install the **CBSubs Tax** plugin (see **Chapter 6.20**). It is used to configure sales tax related aspects to be applied to your subscriptions and merchandise sales. We will be discussing this in **Chapter 7.16.**

15. **Promotions** icon.

This area (and icon) is only available if you install the **CBSubs Promotion** plugin (see **Chapter 6.21**). It is used to configure and monitor usage of **Smart Promotions** functionality. We will be discussing this in detail in **Chapter 7.17.**

16. **Mailer** icon.

This area (and icon) is only available if you install the **CBSubs Mailer** plugin (see **Chapter 6.22**). It is used to configure automated email (or private message) marketing messages. We will be discussing this in detail in **Chapter 7.18.**



Figure 25: CBSubs™ GPL Main menu icons

Now that we have somewhat of a clue regarding what everything is all about, we can go ahead and dig deeper into the functionality and parameterization present in each of the 14 (assuming Tax plugin is installed) Main menu icon areas.

7.3 Settings icon area



This icon area is really the very first area you should visit in order to start configuring your **CBSubs™ GPL** system. This area has all the parameter settings needed to enable your **CBSubs™ GPL** system and to configure and global parameters affecting the overall presentation of the system.

Selecting the **Settings** icon will reveal the '**General plugin settings**' area which is organized in a tabular manor with 8 tabs⁴ as illustrated in **Figure 26**.

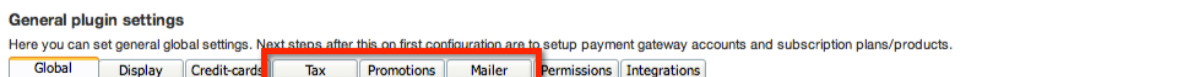


Figure 26: Settings icon area

These 8 tabs are:

- The Global tab,
- The Display tab,
- The Credit-cards tab,
- The Tax tab (only appears if the Tax plugin is installed and published as described in **Chapter 6.20**),
- The Promotions tab (only appears if the Promotions plugin is installed and published as described in **Chapter 6.21**),
- The Mailer tab (only appears if the Mailer plugin is installed and published as described in **Chapter 6.22**),
- The Permissions tab (only appears on Joomla 2.5.x and 3.x environments), and
- The Integrations tab.

These '**Setting** icon area' tabs will be described in the following sub-chapters.

⁴ If the Tax, Promotions and Mailer plugins has not been installed then only 5 tabs will appear in the icon area.

7.3.1 Settings icon → Global tab

The Global tab of the **Settings** icon section has various framed areas in it. These frames are named:

- Information on system
- Registration settings
- Renewal and upgrade settings
- Currency and Price display
- Automation settings
- PCI-DSS settings

7.3.1.1 Settings icon → Global tab → Information on system frame

As illustrated in Figure 27, the parameters on the “Information on system” frame of the Global tab of the **Settings** icon area are:

The Information on system frame contains the following information lines:

- **Your installed version:**
This information is taken from your installation and displayed here for your reference. E.g., you should see 4.1.0 if you have installed **CBSubs™ GPL 4.1.0**.
- **Latest version available:**
This information is generated from the **CBSubs™** system website and displayed here for your reference. You should always try to have the latest version installed.
- **Latest version message:**
The CB Paid Subscription system website along with the ‘Latest version available’ information will also display an informative message regarding the latest version. This way important messages (security, etc) will be pushed to your ‘Information on system frame’ panel for your immediate consideration. E.g., “CBSubs 1.0.3 is a minor bugfix maintenance release”.

- **HTTPS POST subsystem status:**

Important information about your environment (this should be green).

- **Path to OPENSSL on your website:**

This text area will be populated with the path to **OPENSSL** via an auto detection process. You can over-ride if needed.

- **OPENSSL status:**

The status of your **OPENSSL** environment (this should be green).

- **OPENSSL Status (see Settings):**

The **OPENSSL** version of your installation (this should be green).

If everything is properly configured on your website environment (and all the prerequisites are present), then you should see all green messages in this frame.

7.3.1.2 Settings icon → Global tab → Registration settings frame

As illustrated in Figure 27, the parameters on the “Registration settings” frame of the Global tab of the **Settings** icon area are:

- **Show subscription plans at registration:** [initial value: Yes]

You may specify (globally) if subscription plans are to be presented to applicants during registration. If this value is set to ‘Yes’, then all subscription plans that have been marked for registration presentation will be included in the CB website registration form (along with extra registration fields⁵). If this value is set to ‘No’, then no subscription plans will be shown during the registration process. Instead, the subscription plans will be available as upgrades (if specific plan permits this) via the subscriptions tab of each users CB profile.

⁵ CB fields that have been marked to appear during the registration process may be hidden based on subscription plan selection (this will be discussed in the subscriptions plan chapters)

- **Allow Free Registered Users (without subscriptions):** [initial value: Yes]
This parameter will allow you to specify if you want to allow free registered users on your website. If this is set to 'No', then a subscription plan must be selected for each website registered group member.

Note: This setting does not influence members of other ACL groups. For example a member of the Author group will be able to login to the website without an active subscription plan. If you want to manage other ACL groups also in a similar fashion you would need to create a special plan that promotes subscribers to other ACL groups upon subscription activation and demotes back to Registered ACL group upon subscription expiration.

- **Create Subscription also for free lifetime plan:** [initial value: No]
If you have selected to allow free registered users (see previous parameter), then this parameter is used to instruct the **CBSubs™** system to create a subscription for these members.



Registration settings

Select global registration and free subscriptions settings:

Show subscription plans at registration:	Yes	?
Allow Free Registered Users (without subscriptions):	Yes	?
Create Subscriptions also for free lifetime plans:	Yes	?

Figure 27: Registration settings frame

Important Note:

The last two settings are very important for your **CBSubs™** environment and you must take some time to really think things out. By allowing free registered users (without subscriptions), then you are in fact permitting users to register on your website without actually selecting a proposed subscription⁶. Such membership works ok if you are not restricting any content based on **CBSubs™** free plans.

On the other hand, if you have created a free lifetime **CBSubs™** plan, you might want to have this setting set to 'No' and force new applicants to select a plan (free or paid). This way a **CBSubs™** subscription is always created and you will have better control. However, in this case, you might have to manually import (see **Chapter 7.14**)

⁶ The CBSubs™ plans defined must also be configured to not require mandatory plan selection.

your existing registered user membership to assign them to relevant free subscription plans otherwise they will have no site access at all. This note might not make a lot of sense at this point, but you should revisit it once you have completed future chapters and have looked at the presented use cases.

7.3.1.3 Settings icon → Global tab → Renewal and upgrade settings frame

The parameters on the “Renewals and upgrade settings” frame of the Global tab of the **Settings** icon area, also illustrated in Figure 28, are:

- **Show Renewal/Reactivate buttons:** [initial value: Yes]
This parameter is used to specify if you want to display ‘Renewal/Reactivation’ buttons with subscribed plans.
- **Show subscription plans upgrade possibilities:** [initial value: Yes]
This parameter is used to specify if subscription plan upgrade possibilities are to be displayed and presented.

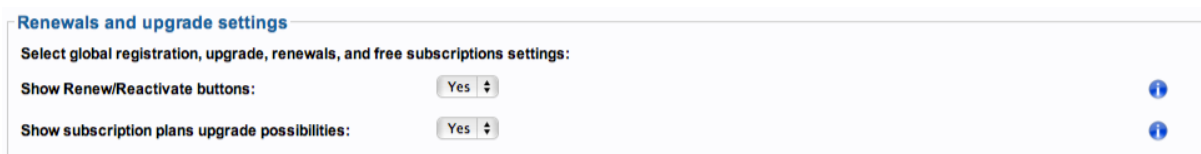


Figure 28: Renewal and upgrade settings frame

7.3.1.4 Settings icon → Global tab → Currency and Price settings frame

The parameters on the “Currency and Price settings” frame of the Global tab of the **Settings** icon area, also shown in Figure 29 are:

- **Main Currency:** [initial value: US Dollar]
This parameter specifies the main currency to be used in your subscription plans. The parameter is populated via a drop-down selectable value mechanism.
- **Multi-currency mode: Secondary Currency:** [initial value: - Multi-currency mode off – no secondary currency -]
This parameter specifies the multi-currency mode of operation for CBSubs™ and can be set to one of the following values:

- – Multi-currency mode off – no secondary currency –
 - Secondary currency selected from drop-down list
- **Number format:** [initial value: 1000.20]

This parameter is used to specify the format that should be used when presenting currency numbers. The parameter is populated via a drop-down selectable value mechanism.
- **Price cents format:** [initial value: 2 decimals (9.00)]

This parameter is used to specify the format used for decimal parts of the numbers. The parameter is populated via a drop-down selectable value mechanism.
- **Price roundings:** [initial value: Nearest 1 cents (29.93)]

This parameter is used to specify the way rounding should be performed. The parameter is populated via a drop-down selectable value mechanism.
- **Price currency format ('EUR' is as example only here):** [initial value: EUR 9.90]

This parameter is used to specify the currency format to be used. The parameter is populated via a drop-down selectable value mechanism.

Allowable values are:

 - EUR 9.90 (use this to display \$ 9.90 when currency is US Dollars)
 - EUR9.90 (use this to display \$9.90 when currency is US Dollars)
 - 9.90 EUR
 - 9.90EUR
 - (Euro-sign) 9.90
 - (Euro-sign) 9.90
 - 9.90 (Euro-sign)
 - 9.90(Euro-sign)
 - 9.90 (no currency display)
- **Display of prices with secondary currency price:** [initial value: [MAIN_CURRENCY_PRICE] (- [SECONDARY_CURRENCY_PRICE])]

This text parameter field allows you to specify how pricing should be displayed when secondary currency is specified. Language strings and the following substitutions are supported:

[MAIN_CURRENCY_PRICE] = currency + price in main currency
[SECONDARY_CURRENCY_PRICE] = secondary currency + price in

secondary currency

[USD] will display price in USD currency

- **Allow currency selection at checkout:** [initial value: Fixed by main currency and plan currency]

This settings can accept on of the following options:

- Fixed by main currency and plan currency
Use this option to always show amounts in your main currency.
- Can also be fixed by gateway and payment method
This option can be used to specify allowed currency list that will be presented to user during checkout for selection (depending on gateway and payment method). A multi-select currency list will appear when this option is selected as shown in **Figure 30**.
- User-selectable at checkout
This option is used to specify currency list (extra parameter will appear to select currency list) that will be presented to user as a drop-down field during checkout. See **Figure 30** for illustration of this parameter.

- **Allowed Currencies for payment:** [initial value: non selected]

This multi-select drop-down box is used to select primary and all secondary currencies that should be used to present prices in **CBSubs™**.

- **Markup of prices when not in currency of plan (in %):** [initial value: 0]

This is the percent to increase the price when displayed or sold in a different currency than plan currency.

- **Currency conversions rounding:** [initial value: No rounding (precise conversion)]

This parameter can be set to one of the following values:

- Yes, rounding to nearest as set above
- No roundings (precise conversion)

Currency and Price display

Set currencies used, roundings and price display styling:

Main Currency:

Multi-currency mode: Secondary Currency:

Numbers format:

Price cents format:

Price roundings:

Price currency format ('EUR' is as example only here):

Display of prices with secondary currency price:

Allow currency selection at checkout:

Markup of prices when not in currency of plan (in %):

Currency conversions rounding:

Figure 29: Currency and Price display frame

Allow currency selection at checkout:

Allowed Currencies for payment:

- Select (CTR/CMD-click: multiple) -----
- Primary and Secondary currencies selected above --
- US Dollar
- Euro
- Canadian Dollar
- Pound Sterling
- Swiss Franc
- Japan Yen
- Afghani
- Lek
- Algerian Dinar
- Andorran Peseta

Currency settings: [More settings for currencies are located in each payment gateway.](#)

Figure 30: Allow currency selection at checkout and currency list parameters

The expected result of the '**Allow currency selection at checkout:**' configuration is illustrated in **Figure 31** and **Figure 32** where we see USD selection and EUR selection.

Your membership for payment:

Item	Price
Merchandise 1 for fenia	USD 100.00
Total	USD 100.00

Currency:

Invoicing address

Figure 31: USD currency selection during checkout

Your membership for payment:

Item	Price
Merchandise 1 for fenia	EUR 77.94
Total	EUR 77.94

Currency: EUR

Invoicing address

Figure 32: EUR currency selection during checkout

7.3.1.5 Settings icon → Global tab → Automation settings frame

This frame has three (3) sub-frames with parameter settings.

The first sub-frame is the Mass expiry settings and it has only one parameter:

- **Mass expire subscriptions method:** [initial value: Admin area only]

This drop-down field select parameter can be configured to one of the following 3 settings:

- **‘Admin area only (100 at a time maximum per main CBSubs admin pageload)’**

By default any backend admin access to **CBSubs™** panel will trigger **CBSubs™** to mass expire any subscriptions needed.

- **Front-end (10 max/page) and admin accesses (100 max/page) (cbpaidsubbot needed)**

This setting also allows any front-end access to trigger mass expire queries (in addition to Admin area access triggering).

- **Cron task and admin access (100 max/page)**

By selecting this parameter the system will construct a URL that can be used to schedule a Cron job to periodically trigger mass expiration queries. You will also be prompted to specify the maximum number of subscriptions to expire per cron task as illustrated in **Figure 33**.

- **Cron task only (no mass-expiry elsewhere)**

This setting is used to have mass expiry only be triggered by the cron job. **Figure 33** also applies here.

Mass expiry settings

Mass expire subscriptions method: Cron task only (no mass-expire elsewhere)

Maximum subscriptions to expire per cron task run:

Uri of cron task: http://localhost:8888/j253/index.php?option=com_comprofiler&task=pluginclass&plugin=cbpaidsubscriptions&do=massexpire&key=7ce7010f0726db41b56c5648a14c70f1&format=raw

Figure 33: Cron Job URL returned from Mass expire subscriptions method parameter

The second sub-frame is the «Automated payments» that has four (4) parameter settings:

- Maximum auto-recurring payments per cron job task run: [initial value: 100]
- URL of cron job: [value automatically generated]
- Output results to cron url: [initial value: Yes]
- Email addresses to email auto-payments results: [initial value: empty]

7.3.1.6 Settings icon → Global tab → PCI-DSS settings frame

This frame has a single parameter setting to Keep HTTP/HTTPS mode as is or to force HTTPS on CBSUs forms.

7.3.2 Settings icon → Display tab

The Display tab of the **Settings** icon section has 6 sub-tab areas in it. These sub-tabs are named:

- Plans sub-tab,
- Baskets sub-tab,
- Invoices sub-tab,
- Unsubscribe sub-tab,
- Expiration sub-tab and
- Template tab.

General plugin settings

Here you can set general global settings. Next steps after this on first configuration are to setup payment gateway accounts and subscription plans/products.

License Global **Display** Credit-cards Tax Integrations

Display formats settings:

Plans Baskets Invoices Unsubscribe Expiration Template

Figure 34: Settings icon - Display sub-tabs

7.3.2.1 Settings icon → Display tab → Plans sub-tab

The Plans sub-tab contains three framed areas named 'Subscriptions presentation', 'Plans and subscriptions presentation' and 'Access not authorized texts'. These are illustrated in **Figure 35**.

The first presentation frame area named 'Subscriptions presentation' is used to provide information that will be used when presenting subscription plans to users.

The framed area contains the following parameters:

- **Singular name for subscription/membership:** [initial value: subscription]
This parameter setting is used to guide the **CBSubs™** system regarding what wording is to be used in front-end presentation when dealing with the subscription/membership singular entity. Language translations are supported.
- **Plural name for subscription/membership:** [initial value: subscriptions]
This parameter setting is used to guide the **CBSubs™** system regarding what wording should be used in front-end presentation when dealing with subscription/membership plural entity. Language translations are supported.
- **Title of registration choice:** [initial value: Subscription plan]
This parameter setting is used to instruct the **CBSubs™** system regarding the wording that should be used in the registration form when presenting the registration choice. Language translations are supported.
- **Display registration choice on:** [initial value: With title above the plans taking full width]
This drop-down select parameter is used to specify how the registration choice should be presented and can take one of the following 2 values:
 - With title on the left of all plans
 - With title above the plans taking full width
- **Title in subscriptions tab:** [initial value: Your Subscriptions]
This parameter setting is used to define the wording used as the title of the CB Profile tab used to present subscription related data and actions to the CB profile owner. Language translations are supported.

- **Periods pricing display:** [initial value: period for price (xx months for Eur yy)]
This setting is used to define how period related pricing is displayed during front-end presentations. Currently 2 options are available via drop-down mechanism:
 - Period for price (xx months for Eur yy)
 - Price for period (Eur yy for xx months)
- **Text duration – - FOR - price:** [initial value: for]
This setting allows you to specify the text displayed between duration and price wordings. Language translations are supported.
- **Text duration – - for - FREE:** [initial value: Free]
This setting specifies the text used to define Free plans. Language translations are supported.
- **Text -LIFETIME SUBSCRIPTION- - for price:** [initial value: Lifetime Subscription]
Setting used to specify wording used for Lifetime subscription plan. Language translations are supported.
- **Show date and time:** [initial value: Show date only]
Setting used to specify date/time format to use when reporting expiration of subscription plans. Currently 2 options are available via drop-down mechanism:
 - Show date only
 - Show date and time

The second presentation frame area named 'Plans and subscriptions presentation' is used to configure how and if plans should appear in the subscriptions tab during frontend user profile viewing.

The framed area contains the following parameters:

- **Show on CB user profile:** [initial value: Display subscriptions tab on user profile]
This parameter setting is used to guide the **CBSubs™** system to show/not show the Subscriptions tab to user when viewing his/her own profile. The subscription tab will contain existing subscriptions, possible upgrades and previously issued invoices. Available settings are:

- Display subscriptions tab on user profile
 - Do not display on user profile
- **Show subscription only to the user:** [initial value: Show only to the user]
This parameter instructs how CBSubs™ handles front-end displaying of subscriptions in the user profile tab.
 - Show only to the user
 - Show also to super-administrators
 - Show also to super-administrators and administrators
 - Show also to super-administrators, administrators and to moderators
- **Url to display subscriptions and plans:** [initial value: automatically generated]
This URL is generated automatically by the CBSubs™ system and is used to access the display of subscriptions and available plans. To display a specific plan just append the: `&plans=id` (where id is the plan id number). E.g., if the URL is appended with `&plans=1-3-6`, then the plans with ids 1,3 and 6 will be displayed.

The third presentation frame area named 'Access not authorized texts' is used to configure what messages should be shown if a plan URL is accessed without proper authorization.

The framed area contains the following parameters:

- **Login or subscribe text (displayed if not logged in):** [initial value: If you already have an account, please login first. Otherwise you need to register using this form.]
This text area parameter setting is used to configure the message that **CBSubs™** should show if an unauthorized access is attempted to a plan URL. The text area supports language string substitutions.
- **Suggestion text for plans subscription (always displayed):** [initial value: We suggest subscribing to following subscriptions:]

This text area parameter is used to define what message should always be displayed by **CBSubs™** when plan suggestions are displayed.

General plugin settings

Here you can set general global settings. Next steps after this on first configuration are to setup payment gateway accounts and subscription plans/products.

License Global **Display** Credit-cards Tax Promotions Mailer Integrations

Display formats settings:

Plans Baskets Invoices Unsubscribe Expiration Template

General settings for plans and products presentation

Subscriptions presentation

Singular name for subscription/membership:

Plural name for subscriptions/memberships:

Title of registration choice:

Display registration choice on:

Title in subscriptions tab:

Periods pricing display:

Text -duration- FOR -price-:

Text -duration- -for- FREE:

Text -LIFETIME SUBSCRIPTION- -for- price:

Show date and time:

Plans and Subscriptions presentation

Show on CB User Profile:

Show subscriptions only to the user:

Url to display subscriptions and plans:

Access not authorized texts

Following texts will display if you use a link to one or more plans:

Login or subscribe text (displayed if not logged in):

Suggestion text for plans subscription (always displayed):

Figure 35: Display Tab, Plans sub-tab, three presentation frames

7.3.2.2 Settings icon → Display tab → Baskets sub-tab

As illustrated in the following **Figure 36**, the Baskets sub-tab allows you to adjust the wording used by the system to communicate various basket-related events to the end-user.

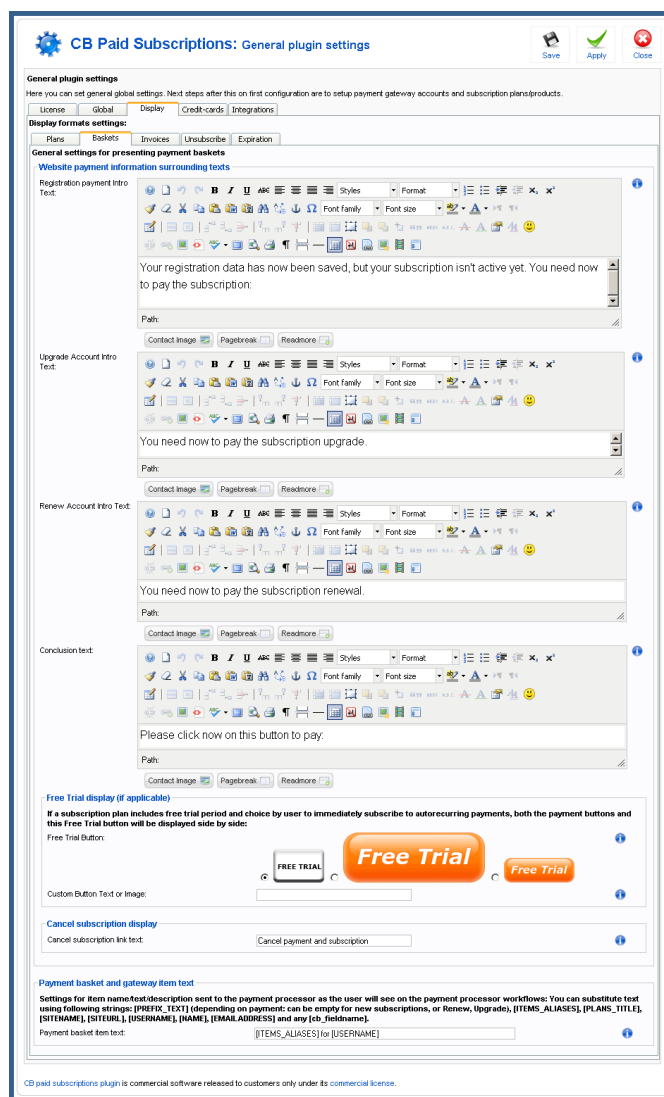


Figure 36: Display tab, Baskets sub-tab

The Baskets sub-tab starts off with 4 HTML editor area parameters that allow you to change the various messages displayed during specific processes of subscription payments. These are:

- **Registration payment intro Text:** [initial value: Your registration data has now been saved, but your subscription isn't active yet. You need now to pay the subscription:]

This editor based parameter allows you to specify the wording and formatting to be used to communicate to the user that the registration form has been accepted but the payment needs to be handled.

Leave this field completely empty to directly redirect to the payment process.

Then (if you only have one payment gateway) the show invoice and display paypal button (or whatever other gateway) step is skipped and you land directly in paypal or in your payment gateway form.

- **Upgrade account intro Text:** [initial value: You need now to pay the subscription upgrade.]

This editor-based parameter allows you to specify the wording and formatting to be used to communicate to the user upgrading his/her subscription plan that the payment needs to be taken care of.

- **Renew account intro Text:** [initial value: You need now to pay the subscription renewal.]

This editor-based parameter allows you to specify the wording and formatting to be used to communicate to the user renewing his/her subscription plan that the payment needs to be taken care of.

- **Conclusion Text:** [initial value: Please click now on this button to pay:]

This editor based parameter allows you to specify the wording and formatting to be used to communicate to the user that the payment needs to be initiated.

- **Final text at bottom of page:** [initial value: empty]

Use this editor parameter to specify what should be displayed after the payment button (language strings and HTML supported).

The 'Payment method choice' frame has a single parameter setting:

- **Choose payment method:** [initial value: Choose payment method by showing all buttons available for payment]
 - Choose payment method by showing all buttons available for payment
 - Choose payment method by showing a radio-selected list of payment methods

If the previous "Choose payment method" parameter is set to the radio select setting, then a new 'Settings for choice of payment method use radios' frame will appear as illustrated in Figure 37.

Payment method choice

Here you can configure how a payment method is chosen by the buyer. If a basket needs to be displayed, because there is an introduction text above or there is more than one payment method.

Choose payment method: Choose payment method by showing a radio-selected list of payment methods ⓘ

Radios texts settings: ⓘ [More settings for radios are below and also located in each payment gateway.](#)

Settings for choice of payment method using radios

Text displayed before the payment method selection radios: Choose your payment method: ⓘ

Text displayed after the payment method selection radios (when none is selected): ⓘ

Text displayed after the payment method selection radios (when one is selected): ⓘ

Template for displaying the payment method selection radios: The template chosen in the global CBSubs Settings, Template tab ⓘ

Order button display for paid orders (if applicable)

If an order in a basket results payment or payment subscription need and payment method radios are selected, but basket still needs to be displayed, this button will be displayed.

Pay Button to display: Standard payment buttons chosen below ⓘ

Single payments at a time

Payment Button: ⓘ

Custom Payment Button Text or Image: ⓘ

Recurring subscribed payments multiple times

Subscription Button: ⓘ

Custom Subscription Button Text or Image: ⓘ

Figure 37: Settings for coise of payment method using radios

Then there is a 'Terms and Conditions on checkout' frame that contains one drop down select parameter:

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- **Display and require accepting terms:** [initial value: Do not ask to approve terms and conditions]

This drop-down parameter can be populated with one of the following settings:

- 'Do not ask to approve terms and conditions'
This setting will instruct **CBSubs™** to proceed with checkout without displaying any terms and conditions item during checkout.
- 'Ask to approve same terms and conditions as on registration page'
This setting will instruct **CBSubs™** to display the same terms and conditions item as configured in CB (configuration area). If this setting is selected an additional text parameter will follow requesting the 'Error to display if Terms and conditions are not accepted'. This additional parameter has an initial value of 'You must accept terms and conditions to proceed.' but can be changed and also supports language strings.
- 'Ask to approve different terms and conditions for checkout'
This setting instructs **CBSubs™** to display a different Terms and conditions clause (compared to the CB configured clause). If selected a new HTML editor parameter will appear that should be populated with new checkout terms and condition text and also another text parameter which should be populated with error message to be displayed if terms and conditions have not been accepted.

Then there is a 'Free trial display (if applicable)' framed area that contains parameters that allow you to specify how the system will display 'Free trial proposal' payments (if the subscription plan allows this). These are:



- **Free Trial Button:** [initial value: 

This radio button parameter setting is used to select the actual Free Trial button to be used.

- **Custom Button text or image:** [initial value: empty]

This setting is populated by a text string that will be used when presenting the Free Trial button or a path to a jpg/gif/bmp file. If populated, this setting overrides previous 'Free Trial Button' setting.

- **Label of Free Trial radio:** [initial value: Free trial]
- **Hover text of Free Trial radio:** [initial value: Subscribe to free trial period only]
- **Description shown when radio is selected for Free trial:** [initial value: empty]

Then we have the 'Cancel subscription display' frame that currently contains one parameter:

- **Cancel subscription link text:** [initial value: Cancel payment and subscription]
Setting defines wording to be used for subscription cancellation link.

The next framed area is titled "Website payment information displayed inside the basket view" and initially contains one drop-down selectable parameter:

- **Columns displayed in basket on screen:** [initial value: Default Display]
This setting defines how columns are displayed in the basket and can be populated with one of the following values:
 - Default Display
This setting will display standard columns in basket view.
 - Custom
This setting will reveal two framed areas that each contain one multi-select checkbox field and one drop-down select field parameter. These areas and the parameters in them can be used to customize what information is to be displayed when viewing the basket.

The first frame that appears when the 'Custom' setting is selected contains the 2 parameters shown in **Figure 38**.

Items columns line 1

Items columns line 1:

Display columns even if empty:

☐ Pos.
☐ Quantity
☐ Art. Num.
☒ Item description
☐ Validity period
☐ Discount text
☐ Discount amount
☐ Second period discount amount (if applicable)
☐ Tax rule code
☐ Tax applied to (pre-tax amount) WORKS ONLY IN TOTALIZER
☐ Second period Tax applied to amount (if any item is recurring) WORKS ONLY IN TOTALIZER
☐ Tax amount
☐ Second period Tax amount (if any item is recurring)
☒ Price
☒ Second period price (if any item is recurring)

Do not display completely empty columns (default) ▼

Figure 38: Item columns for basket custom view

These two parameters are:

- **Items column #1:** [initial value: Item description, price, Second period price (if any item is recurring)]

This multi-select check-box field parameter is used to specify which elements should be displayed when viewing basket information. The configurable elements are:

- ☐ Pos.
- ☐ Quantity
- ☐ Art. num
- ☒ Item description
- ☐ Validity period
- ☐ Discount text
- ☐ Discount amount
- ☐ Second period discount amount (if applicable)
- ☐ Tax rule code
- ☐ Tax applied to (pre-tax amount) WORKS ONLY IN TOTALIZERS
- ☐ Tax amounts
- ☐ Second price Tax amount (if any item is recurring)
- ☒ Price

- ☒ Second period price (if any item is recurring)
- **Display columns even if empty:** [initial value: Do not display completely empty columns (default)]

This drop-down select field parameter is used to specify how empty columns should be treated. The allowable settings are:

- Do not display completely empty columns (default)
- Display columns even if nothing to display in them

The second frame that appears when the 'Custom' setting is selected contains the 2 parameters shown in **Figure 39**.

Totalizers columns line 1

Totalizers columns line 1:

Display columns even if empty:

- ☐ Pos.
- ☐ Quantity
- ☒ Art. Num.
- ☒ Item description
- ☒ Validity period
- ☐ Discount text
- ☐ Discount amount
- ☐ Second period discount amount (if applicable)
- ☐ Tax rule code
- ☐ Tax applied to (pre-tax amount) WORKS ONLY IN TOTALIZER
- ☐ Second period Tax applied to amount (if any item is recurring) WORKS ONLY IN TOTALIZER
- ☐ Tax amount
- ☐ Second period Tax amount (if any item is recurring)
- ☒ Price
- ☒ Second period price (if any item is recurring)

Do not display completely empty columns (default)

Figure 39: Totalizers columns for basket custom view

- **Totalizers column line 1:** [initial value: Art. Num., Item description, Validity period, price, Second period price (if any item is recurring)]

This multi-select check-box field parameter is used to specify which elements should be displayed when viewing basket information. The configurable elements are:

- ☐ Pos.
- ☐ Quantity
- ☒ Art. num

- ☒ Item description
- ☒ Validity period
- ☐ Discount text
- ☐ Discount amount
- ☐ Second period discount amount (if applicable)
- ☐ Tax rule code
- ☐ Tax applied to (pre-tax amount) WORKS ONLY IN TOTALIZERS
- ☐ Tax amounts
- ☐ Second price Tax amount (if any item is recurring)
- ☒ Price
- ☒ Second period price (if any item is recurring)

- **Display columns even if empty:** [initial value: Do not display completely empty columns (default)]

This drop-down select field parameter is used to specify how empty columns should be treated. The allowable settings are:

- Do not display completely empty columns (default)
- Display columns even if nothing to display in them

The 'Payment basket and gateway item text' framed area contains one parameter:

- **Payment basket item text:** [initial value: [ITEMS_ALIASES] for [USERNAME]]

This setting is used to specify the wording to appear in payment baskets.

The Payment basket timeouts framed area has the following 2 parameters:

- **Hours for payment basket to timeout in front-end:** [initial value: 3]
- **Hours for payment basket to timeout in administration:** [initial value: 24]

7.3.2.3 Settings icon → Display tab → Invoices sub-tab

The Invoices sub-tab of the **Settings** icon Display tab is used to define all invoice related aspects and functionality.

The Invoice numbering framed-area begins with a single drop-down select parameter that is used to specify how **CBSubs™** should organize the invoicing process:

- **Numbering of invoices:** [initial value: Single invoice number, assigned at ordering time (default)]

This single select drop-down parameter can be set to one of the following values:

- Single invoice number, assigned at ordering time (default)
This is the default value that instructs CBSubs to create a single invoice number that is assigned at time of ordering. This might result in invoice numbers being skipped because of orders that did not convert to payments.
- Proforma invoice number at ordering time, then different final invoice number once paid
This (new in CBSubs 1.3) setting will instruct CBSubs to generate a proforma invoice number that is generated at time of order, while the formal invoice number is generated when payment takes place.

The Proforma invoices numbering framed area (appears only if 'Numbering of invoices' parameter was set to Proforma invoicing mode) has the following parameters:

- **Proforma invoice number format:** [initial value: PR-[PREFIX_TEXT][GROWINGID]]
This is the format scheme that should be used for proforma invoice numbering. The default value will create numbering like: PR-R1234567890123456.
- **Next Proforma invoice [NUMBER] that will be used:** [initial value: empty – needs form save to recalculate]
This calculated field will only appear if the [NUMBER] substitution is used in the previous 'Proforma invoice number format' parameter.
- **Reset next Proforma invoice [NUMBER] to:** [initial value: empty]
This is the next starting number to be used for proforma invoice numbering. It

will only appear if the [NUMBER] substitution is used in the previous 'Proforma invoice number format' parameter. If you change this and then save the settings, you should see a new calculated value for the 'Next Proforma invoice [NUMBER] that will be used' parameter.

- **Increment each consecutive Proforma invoice [NUMBER] by:** [initial value: 1]

This is the step value that should be used when calculating the next Proforma invoice [NUMBER] based on the previous one. It will only appear if the [NUMBER] substitution is used in the previous 'Proforma invoice number format' parameter. If you change this and then save the settings, you should see a new calculated value for the 'Next Proforma invoice [NUMBER] that will be used' parameter.

- **Proforma invoice title format:** [initial value: Proforma Invoice [INVOICENUMBER]]

This parameter is the complete title for the proforma invoice (including number). The [INVOICENUMBER] substitution will grab value of first 'Proforma invoice number format' calculated parameter.

The 'Paid invoices numbering' framed area has the following parameters:

- **Invoice number format:** [initial value: [PREFIX_TEXT][NUMBER]]

This is the format scheme that should be used for the invoice numbering. The [NUMBER] substitution will result in a calculated number everytime based on the last calculated invoice number and the 'Reset next invoice [NUMBER] to' parameter and the 'Increment each consecutive invoice [NUMBER] by' parameter settings.

- **Next invoice [NUMBER] that will be used:** [initial value: empty – needs form save to recalculate]

This calculated field will only appear if the [NUMBER] substitution is used in the previous 'Invoice number format' parameter.

- **Reset next invoice [NUMBER] to:** [initial value: empty]

This is the next starting number to be used for invoice numbering. It will only appear if the [NUMBER] substitution is used in the previous 'Proforma invoice number format' parameter. If you change this and then save the settings, you

should see a new calculated value for the 'Next invoice [NUMBER] that will be used' parameter.

- **Increment each consecutive invoice [NUMBER] by:** [initial value: 1]
This is the step value that should be used when calculating the next invoice [NUMBER] based on the previous one. It will only appear if the [NUMBER] substitution is used in the previous 'Invoice number format' parameter. If you change this and then save the settings, you should see a new calculated value for the 'Next invoice [NUMBER] that will be used' parameter.
- **Invoice title format:** [initial value: Invoice [INVOICENUMBER]]
This is the invoice title (including the invoice number) that should be displayed.

The following substitutions and examples can be used to further customize and configure your specific invoice use case.

[PREFIX_TEXT]:	Letter depending on payment type: N for new subscriptions during registration, R for Renewing an existing subscription, U for Upgrade to a new subscription.
[NUMBER]:	[NUMBER] for strictly incrementing unique numbers for the corresponding type of invoice number starting at 1 (or the number displayed above that can be reset to a given value).
[NUMBER:firstnumber]	This is same as [NUMBER], except that you can set the format [NUMBER:1] starting at 1 (where 1 can be replaced by the starting number of your choice, and a fixed number of filler 0s can be added in front: e.g. [NUMBER:000012] will display invoice 211 as 000211).
[NUMBER:firstnumber:RESTART:period]:	Optionally a numbering restart time can be set with :RESTART:period (no spaces), e.g. [NUMBER:1:RESTART:YEARLY], where instead of YEARLY, MONTHLY and DAILY are also supported.
[YEAR], [YEARSHORT], [MONTH] and [DAY]:	[YEAR] with 4 digit year, [YEARSHORT] with 2 digits year, [MONTH] and [DAY] of invoice creation (for proforma) or of payment (for final invoice) can also be used.
[GROWING_ID], [UNIQ_ID]:	The [GROWING_ID] replacement can be used for a time-dependant, microsecond-resolution, 16-digits decimal uniqid(), which is always increasing, while [UNIQ_ID] can be used as a unique 16-digits id that looks random.
[ARTNUMS], [SITENAME], [SITEURL], [USERNAME], [NAME], [EMAIL], [cb_fieldname]:	You can also use: [ARTNUMS] for article ids, [SITENAME], [SITEURL], [USERNAME], [NAME], [EMAIL] and any [cb_fieldname].
Example 1: Year + Number in year: 2013-0001:	If you want to start at invoice number 2012-0051, where 2012 is the current year, and 0051 the invoice number to be reset to 1 every new year:

	Enter "[YEAR]-[NUMBER:0001:RESTART:YEARLY]" in the "Invoice number format" field, and "51" in the "Invoice reset starting number to" field once at begin. First invoice number will then be "2012-0051" and then increment whole year. First invoice of 2013 will then be "2013-0001" and then increment from there.
Example 2: Date + Number in day: INV-2012-04-28-1:	If you want the date included in the invoice number and restart numbering each day, you can use for instance: "INV-[YEAR]-[MONTH]-[DAY]-[NUMBER:0001:RESTART:DAYLY]" which will give e.g. "INV-2012-04-28-1" as first invoice on that day.

The "Invoice totalizers ordering" framed area contains the following parameters:

- **Subtotal 1:** [initial value: 10]
- **Subtotal 2:** [initial value: 0]
- **Sales Tax:** [initial value: 40]
- **Subtotal 3:** [initial value: 0]
- **Subtotal 4:** [initial value: 0]
- **Grand total:** [initial value: 100]

The "Invoice totalizers labeling" frame contains the "Sub-Total 1 labeling" frame and the "Grand Total labeling" frame.

The "Sub-Total 1 labeling" frame has the following parameters in it:

- **Subtotal 1 article number:** [initial value: empty]
- **Subtotal 1 article description:** [initial value: Sub-total]

The "Grand Total labeling" frame contains the following parameters:

- **Grand Total article number:** [initial value: empty]
- **Grand Total article description:** [initial value: [AUTOMATIC]]

The "Frontend invoice display settings" frame contains the following parameters:

- **Invoicing address handling at payment time:** [initial value: Non-mandatory invoicing address]
If the invoicing address is shown and required, proposed or not during

payment time.

Available options via drop-down list include:

- No invoicing address shown

If this setting is activated then the '**CB fields for first invoicing address of customer frame area**' discussed later in this section will not be shown.

- Non-mandatory invoicing address

If this setting is activated then the '**CB fields for first invoicing address of customer frame area**' discussed later in this section will be shown.

- Mandatory invoicing address

This setting is used to instruct CBSubs™ that the invoicing address is mandatory and must be populated by the subscriber/purchaser/donor. If this setting is activated then a 'Introduction text when requiring invoicing address:' editor field parameter will appear along with the '**CB fields for first invoicing address of customer frame area**' discussed later in this section.

- **Introduction text when requiring invoicing address:** [initial value: We need your complete address to be able to provide you with an invoice after your payment. Please complete your invoicing address below. This address will be used only for the invoicing and will not appear on your user profile.]
This editor field area parameter is used to specify the formatted message that should be shown during the **CBSubs™** checkout process when requesting that a mandatory invoice address is required.

The '**CB fields for first invoicing address of customer**' framed area will appear only if the **Invoicing address handling at payment time:** parameter is set to an option other than the 'No invoicing address shown' value. This frame has the following parameters in it:

- **Name field:** [initial value: Name]

This parameter is used to specify the CB field that should be used to generate

the name value on the invoice. It is populated via a drop-down selectable mechanism from a list of CB fields present on the site.

- **Company field:** [initial value: --- Select Field ---]

This parameter is used to specify the CB field that should be used to generate the Company name value on the invoice. It is populated via a drop-down selectable mechanism from a list of CB fields present on the site.

- **Address field:** [initial value: --- Select Field ---]

This parameter is used to specify the CB field that should be used to generate the address value on the invoice. It is populated via a drop-down selectable mechanism from a list of CB fields present on the site.

- **City field:** [initial value: --- Select Field ---]

This parameter is used to specify the CB field that should be used to generate the name value on the invoice. It is populated via a drop-down selectable mechanism from a list of CB fields present on the site.

- **State field:** [initial value: --- Select Field ---]

This parameter is used to specify the CB field that should be used to generate the name value on the invoice. It is populated via a drop-down selectable mechanism from a list of CB fields present on the site.

- **Zipcode field:** [initial value: --- Select Field ---]

This parameter is used to specify the CB field that should be used to generate the Zip Code value on the invoice. It is populated via a drop-down selectable mechanism from a list of CB fields present on the site.

- **Country field:** [initial value: --- Select Field ---]

This parameter is used to specify the CB field that should be used to generate the country value on the invoice. It is populated via a drop-down selectable mechanism from a list of CB fields present on the site.

- **Phone field:** [initial value: --- Select Field ---]

This parameter is used to specify the CB field that should be used to generate the phone number value on the invoice. It is populated via a drop-down selectable mechanism from a list of CB fields present on the site.

- **VAT number:** [initial value: --- Select Field ---]

This parameter is used to specify the CB field that should be used to generate the VAT number that should be displayed on the invoice.

- **Show invoices:** [initial value: Yes]
Specify if you want the users to be able to display their pending and completed invoices. If the value is set to 'No' then many of the following parameters will be hidden.
- **Show in user profile subscription tab invoices of last:** [initial value: 6 months]
Invoices will be shown for this duration period. You can select from drop down list values from 5 minutes to 10 years.

The 'Invoice content and styling settings for System owner' framed area contains the following parameters:

- **Custom header image/html** [initial value: see **Figure 40**]
This parameter is populated via an editor text area and will be used to generate a header for the invoice. A set of substitution fields can be used (see end of this section for list of substitution fields).

Then the 'Invoice content and styling settings for System owner' frame will appear with the following parameters:

- **Custom Header Image Alt text (if image in header):** [initial value: Invoice header image: text in this image is: ...]
This parameter is used to specify the alternative text to be used for accessibility purposes if image was used in Custom header image/html parameter (see previous setting).
- **Custom Header Image Alignment:** [initial value: Left]
This parameter is used to specify the header invoice image alignment to be used. It is populated via a drop-down selectable mechanism from the following list:
 - Left
 - Center
 - Right
 - Separately using CSS stylesheet

- **Address of site owner (seller):** [initial value: see **Figure 41**]
This parameter is used to specify the Seller address information to be presented in the invoice.
- **Customer address format:** [initial value: see **Figure 42**]
This parameter is used to specify the Customer address information to be presented in the invoice.
- **Custom text for 'Terms and Conditions':** [initial value: see **Figure 43**]
This parameter is used to specify the 'Terms and Conditions' type information to be presented in the invoice.
- **Custom footer image:** [initial value: empty]
This parameter is used to specify the footer image to use in the invoice.
- **Custom footer Image Alt text (if image in header):** [initial value: Invoice footer image: text in this image is: ...]
This parameter is used to specify the alternative text to be used for accessibility purposes if image was used in Custom footer image/html parameter (see previous setting).
- **Custom Footer Image Alignment:** [initial value: Center]
This parameter is used to specify the footer invoice image alignment to be used. It is populated via a drop-down selectable mechanism from the following list:
 - Left
 - Center
 - Right
 - Separately using CSS style-sheet
- **Substitutions in all fields of invoice:**
The following substitutions are applicable in all invoice parameter settings:
[SITENAME], [SITEURL], [INVOICE_NO], [INVOICE_ID], [ITEMS_NAME], [ITEMS_NUMBERS], [PAYMENT_STATUS], [PAYMENT_METHOD],

Figure 40: Invoice Custom Header

Figure 41: Address of Site Owner for Invoice

Figure 42: Customer Address format for Invoice

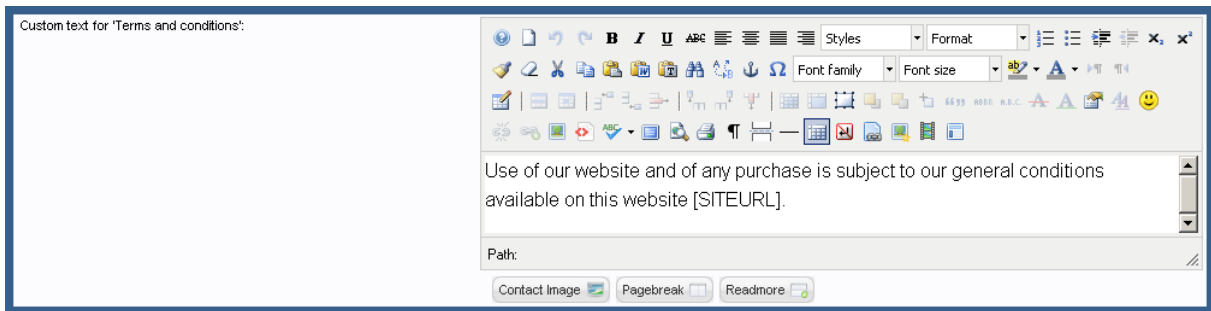


Figure 43: Custom text for Terms and Conditions

The final framed area is titled “Website payment information displayed inside the invoice view” and initially contains one drop-down selectable parameter:

- **Columns displayed on invoice:** [initial value: Default Display]

This setting defines how columns are displayed in the invoice and can be populated with one of the following values:

- Default Display

This setting will display standard columns in the invoice.

- Custom

This setting will reveal two framed areas that each contain one multi-select checkbox field and one drop-down select field parameter. These areas and the parameters in them can be used to customize what payment related information is to be displayed when viewing the invoice.

The first frame that appears when the ‘Custom’ setting is selected contains the 2 parameters shown in **Figure 44**.

Items columns line 1

Items columns line 1:

Display columns even if empty:

☐ Pos.

☐ Quantity

☐ Art. Num.

☒ Item description

☐ Validity period

☐ Discount text

☐ Discount amount

☐ Second period discount amount (if applicable)

☐ Tax rule code

☐ Tax applied to (pre-tax amount) WORKS ONLY IN TOTALIZER

☐ Second period Tax applied to amount (if any item is recurring) WORKS ONLY IN TOTALIZER

☐ Tax amount

☐ Second period Tax amount (if any item is recurring)

☒ Price

☒ Second period price (if any item is recurring)

Do not display completely empty columns (default) ▼

Figure 44: Payment item columns to include in invoice

These two parameters are:

- **Items columns line 1:** [initial value: Item description, price, Second period price (if any item is recurring)]

This multi-select check-box field parameter is used to specify which elements should be displayed when viewing basket information. The configurable elements are:

- ☐ Pos.
- ☐ Quantity
- ☐ Art. num
- ☒ Item description
- ☐ Validity period
- ☐ Discount text
- ☐ Discount amount
- ☐ Second period discount amount (if applicable)
- ☐ Tax rule code
- ☐ Tax applied to (pre-tax amount) WORKS ONLY IN TOTALIZERS
- ☐ Tax amounts
- ☐ Second price Tax amount (if any item is recurring)
- ☒ Price

- ☒ Second period price (if any item is recurring)
- **Display columns even if empty:** [initial value: Do not display completely empty columns (default)]

This drop-down select field parameter is used to specify how empty columns should be treated. The allowable settings are:

- Do not display completely empty columns (default)
- Display columns even if nothing to display in them

The second frame that appears when the 'Custom' setting is selected is the "Totalizers columns line 1" frame shown in **Figure 45**.

Totalizers columns line 1

Pos. ☐

Quantity ☐

☒ Art. Num.

☒ Item description

☒ Validity period

Discount text ☐

Discount amount ☐

Second period discount amount (if applicable) ☐

Tax rule code ☐

Tax applied to (pre-tax amount) WORKS ONLY IN TOTALIZER ☐

Second period Tax applied to amount (if any item is recurring) WORKS ONLY IN TOTALIZER ☐

Tax amount ☐

Second period Tax amount (if any item is recurring) ☐

☒ Price

☒ Second period price (if any item is recurring)

Display columns even if empty:

Figure 45: Payment item totalizers to include in invoice view

The "Totalizers columns line 1" frame contains the following 2 parameters:

- **Totalizers column line 1:** [initial value: Art. Num., Item description, Validity period, price, Second period price (if any item is recurring)]

This multi-select check-box field parameter is used to specify which elements should be displayed when viewing basket information. The configurable elements are:

- ☐ Pos.
- ☐ Quantity
- ☒ Art. num

- ☒ Item description
- ☒ Validity period
- ☐ Discount text
- ☐ Discount amount
- ☐ Second period discount amount (if applicable)
- ☐ Tax rule code
- ☐ Tax applied to (pre-tax amount) WORKS ONLY IN TOTALIZERS
- ☐ Tax amounts
- ☐ Second price Tax amount (if any item is recurring)
- ☒ Price
- ☒ Second period price (if any item is recurring)
- **Display columns even if empty:** [initial value: Do not display completely empty columns (default)]

This drop-down select field parameter is used to specify how empty columns should be treated. The allowable settings are:

 - Do not display completely empty columns (default)
 - Display columns even if nothing to display in them

7.3.2.4 Settings icon → Display tab → Unsubscribe sub-tab

The Unsubscribe sub-tab of the **Settings** icon Display tab is used to specify how **CBSubs™** will handle and display unsubscribing related messages and actions. The parameter settings in this sub-tab are:

- **Show unsubscribe buttons:** [initial value: Yes]

This setting specifies if unsubscribe buttons are to be presented next to active subscription plans.
- **Unsubscription Intro Text:** [initial value: see **Figure 46**]

This editor area parameter is used to specify the formatted message that will be presented to the user when he/she elects to unsubscribe from a plan
- **Unsubscription Confirmation Text:** [initial value: see **Figure 47**]

This editor area parameter is used to specify the formatted message that will be presented to the user upon successfully unsubscribing from an active plan.

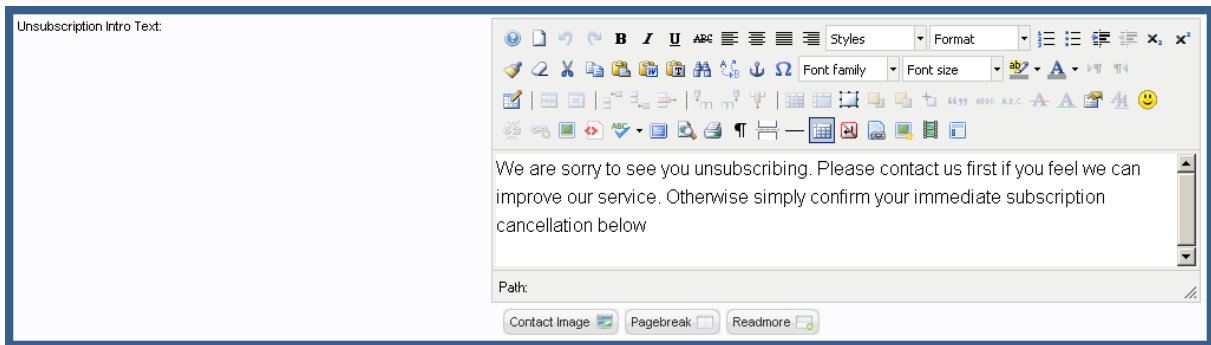


Figure 46: Unsubscribe Intro Text

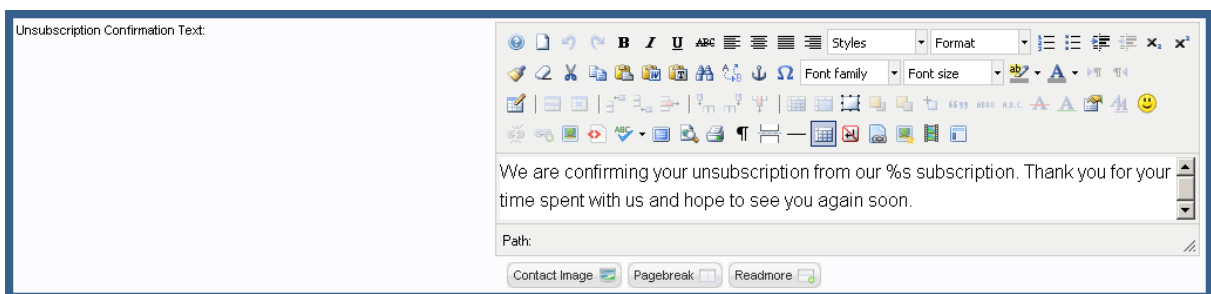


Figure 47: Unsubscribe Confirmation text

7.3.2.5 Settings icon → Display tab → Expiration sub-tab

The Expiration sub-tab of the **Settings** icon Display tab is used to specify how **CBSubs™** will handle and display expired plans related messages and actions. The parameter settings in this sub-tab are:

- **Error text for expired existing memberships:** [initial value: see **Figure 48**]
This editor area parameter is used to format the message communicated to a user when his/her membership to a plan has expired.
- **Error text for non-existent required memberships of existing users:** [initial value: see **Figure 49**]
This editor area parameter is used to specify and format the text to be shown to registered users without any subscriptions but on a site that now requires subscriptions.
- **Membership expired redirect URL:** [initial value: empty]
Populate this parameter with the URL you want a user to be directed to if

access is attempted to a previously accessible area which is no longer authorized due to an expired subscription.

- **Membership needed for access redirect URL for existing users:** [initial value: empty]

Similar URL to be used if access to restricted area is attempted without expired subscription present.

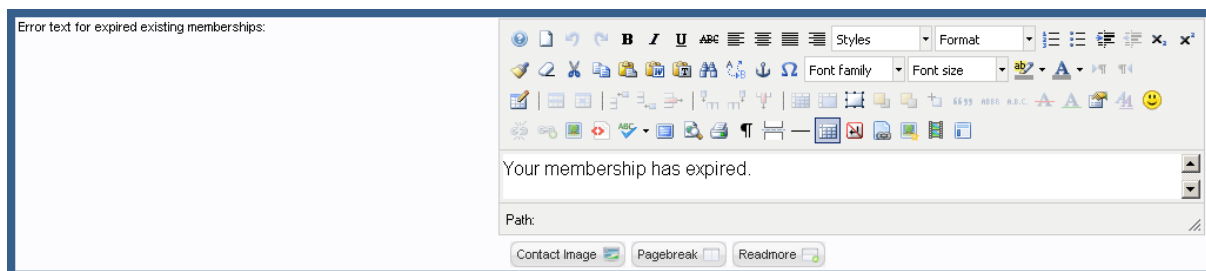


Figure 48: Error text for expired membership

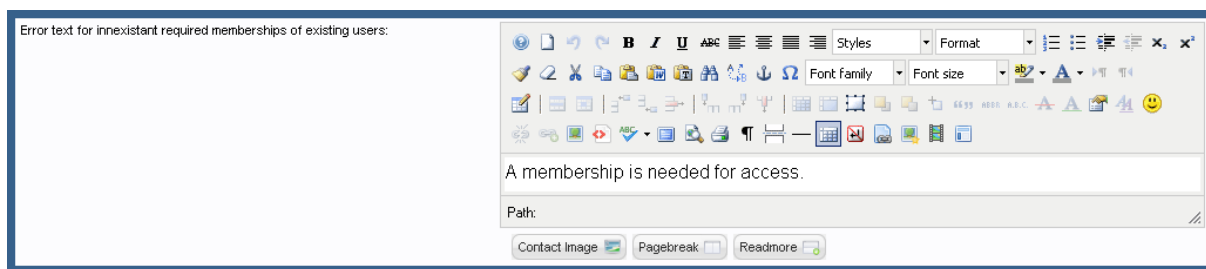


Figure 49: Error text for inexistent required membership

7.3.2.6 Settings icon → Display tab → Template sub-tab

The Template sub-tab of the **Settings** icon Display tab is used to specify how **CBSubs™** will appear to the end-user. This sub-tab has one parameter as shown in **Figure 50**.

Each **CBSubs™** plan can use a different **CBSubs™** Template (see **Chapter 7.5.1**). Also CMS templates can override the views in folder:

```
templates/[cmsTemplateName]/html/com_comprofiler/plugin/user/plug_cbpaidsubscriptions/[viewname]/[layout].php
```

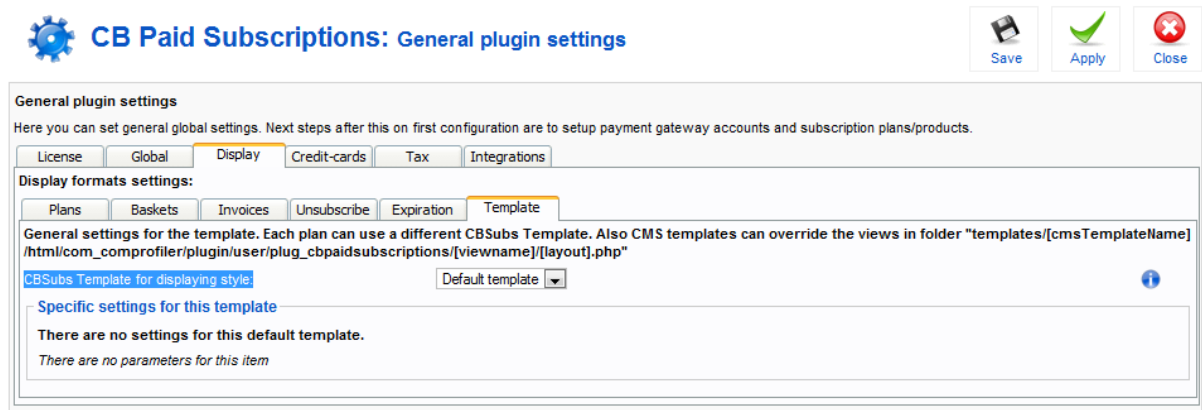


Figure 50: Template sub-tab

- CBSubs Template for displaying style:** [initial value: Default template]
 This drop-down field parameter is used to specify the template CBSubs™ should use when rendering its output. Designers may also create their own templates and install them as CB template plugins. The **rounded** CBSubs template included in the CBSubs™ package can serve as a guide for template designing.

7.3.3 Settings icon → Credit-cards tab

The Credit-cards tab of the **Settings** icon section is used to define how the CBSubs™ system handles credit cards. The following parameters are applicable:

- Ask for CCV2/CVC2/CID:** [initial value: yes]
 Whether you must ask for the CCV2/CVC2/CID codes.
- User login session on https switchover:** [initial value: Logout user from http on https switchover]
 Whether you must keep user logged-in twice, once for http and once for https when the credit card form is shown (more user friendly this way) or if you want to logout user from http when switching to https (more secure).

Available options are:

- Logout user from http on https switchover
- Keep user logged-in also in http

- **Security logos and seals HTML code:** [initial value: empty]
Insert here the Authorize.net seal and SSL verification logos to ensure customer trust.
- **Credit-Cards from http(s) mode:** [initial value: HTTPS (normal secure mode required for normal credit cards)]
Sometimes https ssl secured modes are not available on test servers and this mode allows you to do the tests but only with test servers.
Available options are:
 - HTTPS (normal secure mode required for normal credit-cards)
 - HTTP (insecure mode for test only – not allowed for real use – should be set for Dummy gateway testing)

7.3.4 Settings icon → Tax

The Tax tab of the Settings icon section will appear only if the **CBSubs Tax** plugin is installed and published as described in **Chapter 6.20**. This tab contains settings associated with the **CBSubs™** taxation handling process. This is illustrated in **Figure 51**.

The screenshot shows the 'Tax' tab selected in a settings menu. The menu includes tabs for Global, Display, Credit-cards, Tax, Promotions, Mailer, Permissions, and Integrations. The 'General Sales Tax / VAT Settings' section contains the following fields:

- Taxes computation enabled: Radio buttons for 'Yes' (selected) and 'No'.
- Taxes included in plan prices: A text input field containing 'Sales taxes not included (buyer pays all applicable taxes on top of price)'.
- Default Customer Country: A dropdown menu showing '--- No Default Country ---'.
- Default Customer State / Province: A dropdown menu showing '--- Select State / Province ---'.
- Default Buyer Zip Code: An empty text input field.
- System Seller Country: A dropdown menu showing '--- Select Country ---'.
- System Seller State / Province: A dropdown menu showing '--- Select State / Province ---'.
- System Seller Zip Code: An empty text input field.

Figure 51: General plugin settings → Tax tab

The following parameters are available:

- **Taxes computation enabled:** [initial value: Yes]
This Yes/No field parameter must be set to Yes in order to enable the **CBSubs™** taxation system.
- **Taxes included in plan prices:** [initial value: Sales taxes not included]
This drop-down field lets you specify if taxes should be calculated and included in plan price displays to potential customer.
There are three options to chose from:
 - Sales taxes not included (buyer pays all applicable taxes on top of price)
 - Applicable sales taxes included (fixed price for buyer, seller pays all applicable taxes)
 - Standard sales taxes included (Price includes sales taxes applicable for consumers at default buyer address, buyer pays/benefits from difference)
- **Default Customer Country:** [initial value: -- No Default Country --]
Select the default country to be assumed for buyer.
- **Default Customer State / Province:** [drop-down selector]
Select the default state / province of buyer.
- **Default Buyer Zip Code:** [text parameter]
This parameter should be populated with the defauly buyer zip code that will be used for tax calculations.
- **System Seller Country:** [initial value: -- Select Country --]
You need to specify the Country of the seller (where the goods are being provided from). This drop-down field is pre-populated by the **CBSubs Tax** plugin (more information about existing Country entities is provided in **Chapter 7.16.6**).
- **System Seller State / Province:** [initial value: -- Select State / Province --]
You need to specify the State / Province of the seller. This drop-down field is pre-populated by the **CBSubs Tax** plugin (more information about existing Country entities is provided in **Chapter 7.16.7**).

- **System Seller Zip Code:** [initial value: empty]

This text field parameter should be populated with the zip code (postal code) of the seller.

7.3.5 Settings icon → Promotions

The Promotions tab of the Settings icon section will appear only if the CBSubs Promotion plugin is installed and published as described in **Chapter 6.21**. This tab contains settings associated with the **CBSubs™** Promotions functionality. This is illustrated in Figure 52.

CB Paid Subscriptions: General plugin settings

General plugin settings

Here you can set general global settings. Next steps after this on first configuration are to setup payment gateway accounts and subscription plans/products.

License Global Display Credit-cards Tax **Promotions** Mailer Integrations

General Promotions Settings

Promotions enabled: Yes

Coupons entry redemption form on basket display settings

Label for coupon code before the redemption field: Enter Coupon code if available:

Text on the redemption button after the field: Redeem Coupon

Description text after the redemption field:

Text on the coupon removal button: Remove

Note: The coupons form will only be visible at checkout if the basket is displayed and if a promotion with coupon is available for any of the items in the basket.

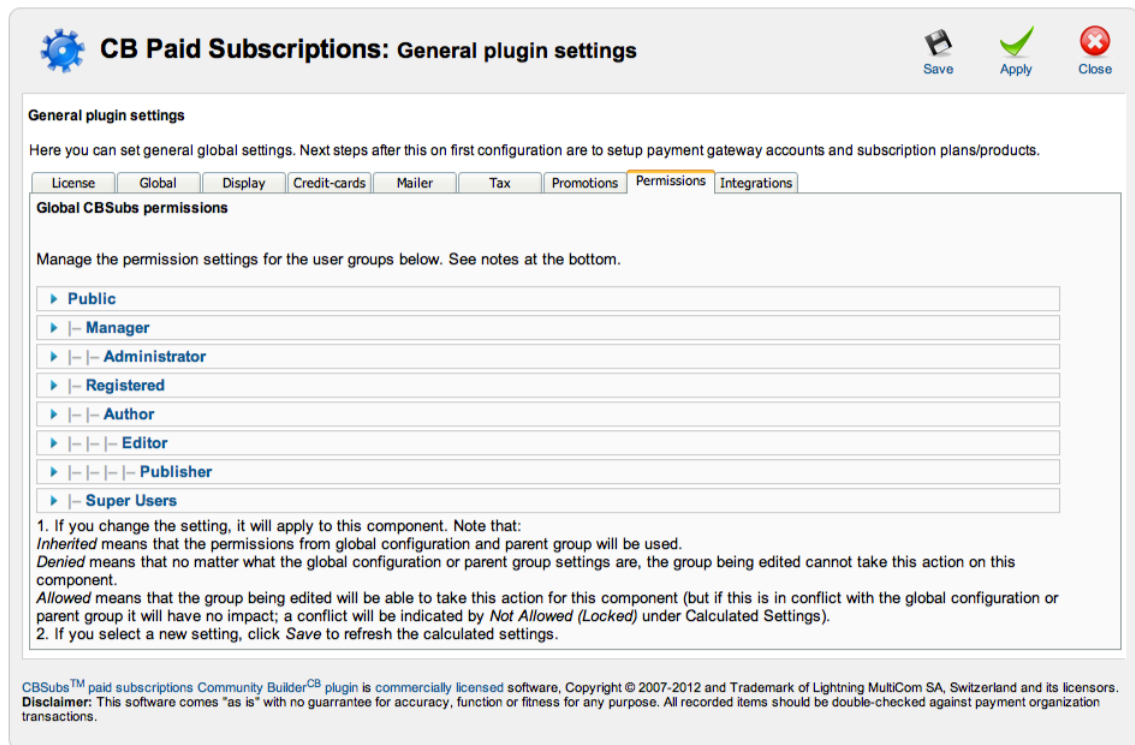
Parameters settings: More settings are done from within the paid subscriptions plugin in each plan/product and in the Promotions Settings menu item.

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Disclaimer: This software comes "as is" with no guarantee for accuracy, function or fitness for any purpose. All recorded items should be double-checked against payment organization transactions.

Figure 52: General plugin Settings → Promotions tab

7.3.6 Settings icon → Permissions

The Permissions tab of the Settings icon area will only appear on Joomla 2.5 environments. It allows you to configure which Joomla ACL groups can access various administrative areas and functions of CBSubs as illustrated in Figure 53.



CB Paid Subscriptions: General plugin settings

General plugin settings

Here you can set general global settings. Next steps after this on first configuration are to setup payment gateway accounts and subscription plans/products.

License Global Display Credit-cards Mailer Tax Promotions **Permissions** Integrations

Global CBSubs permissions

Manage the permission settings for the user groups below. See notes at the bottom.

- Public
- Manager
- Administrator
- Registered
- Author
- Editor
- Publisher
- Super Users

1. If you change the setting, it will apply to this component. Note that:
Inherited means that the permissions from global configuration and parent group will be used.
Denied means that no matter what the global configuration or parent group settings are, the group being edited cannot take this action on this component.
Allowed means that the group being edited will be able to take this action for this component (but if this is in conflict with the global configuration or parent group it will have no impact; a conflict will be indicated by *Not Allowed (Locked)* under Calculated Settings).

2. If you select a new setting, click **Save** to refresh the calculated settings.

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Figure 53: General plugin Settings → Permissions tab

By default the superadmin users are granted access to all CBSubs related actions as illustrated in Figure 54.

Super Users		
Action	Select New Setting ¹	Calculated Setting ²
Configure these CBSubs permissions	Inherited	✓ Allowed
① Access CBSubs in administration area	Inherited	✓ Allowed (Super Admin)
Manage CBSubs general settings	Inherited	✓ Allowed (Super Admin)
Manage Gateways settings	Inherited	✓ Allowed (Super Admin)
Manage Sales operations	Inherited	✓ Allowed (Super Admin)
└ Record payment transactions	Inherited	✓ Allowed (Super Admin)
└ Refund from within CBSubs	Inherited	✓ Allowed (Super Admin)
View User Subscriptions	Inherited	✓ Allowed (Super Admin)
└ Manage User Subscriptions	Inherited	✓ Allowed (Super Admin)
View Merchandise purchases	Inherited	✓ Allowed (Super Admin)
└ Manage Merchandise purchases	Inherited	✓ Allowed (Super Admin)
View Donations	Inherited	✓ Allowed (Super Admin)
└ Manage Donations	Inherited	✓ Allowed (Super Admin)
Manage Marketing operations	Inherited	✓ Allowed (Super Admin)
Manage Financial operations	Inherited	✓ Allowed (Super Admin)

Figure 54: General Settings → Permissions tab superadmin privileges

Please note that CB related plugin access privileges must also be granted to ACL groups in order for these settings to work. E.g., if a Manager group cannot access CB plugin management area, then they cannot access any CBSubs icon area.

7.3.7 Settings icon → Mailer

The Mailer tab of the Settings icon section will appear only if the **CBSubs Mailer** plugin is installed and published as described in **Chapter 6.22**. This tab contains settings associated with the **CBSubs™** Mailer features. This is illustrated in **Figure 55**.

CB Paid Subscriptions: General plugin settings

General plugin settings

Here you can set general global settings. Next steps after this on first configuration are to setup payment gateway accounts and subscription plans/products.

License Global Display Credit-cards Tax Promotions **Mailer** Integrations

General Mailer Settings

Mailer enabled: Yes

Mailer automation settings

These are global settings for batches to send. You will also need to setup cron jobs as described in Mailer - Automation settings.

Number of mailer items to send from messages queue per cron run: 100

Number of maximum trials to send mailer items from messages queue before final failure: 3

Number of hours to wait before retrying to send a failed message: 24

Templates for Emails and Private Messages

These can optionally be used in each mailer

Email template (HTML emails):

[MESSAGE_CONTENT]

Path: p

Article Image Page Break Read More Toggle editor

Figure 55: General plugin Settings → Mailer tab

The parameters in this area will be used by **CBSubs™** Mailer feature when preparing and sending mailer messages.

The following parameter settings are available:

- **Mailer enabled:** [initial value: Yes]
- **Number of mailer items to send from message queue per cron job:** [initial value: 100]
- **Number of maximum trials to send mailer items from message queue before final failure:** [initial value: 3]

- **Number of hours to wait before retrying to send failed message:** [initial value: 24]
- **Email template (HTML emails):** [initial value: [MESSAGE_CONTENT]]
- **Email template (Plaintext emails):** [initial value: [MESSAGE_CONTENT]]
- **Private message template:** [initial value: [MESSAGE_CONTENT]]

7.3.8 Settings icon → Integrations tab

The Integrations tab of the **Settings** icon section is used to define how the **CBSubs™** system handles various CMS and Component integrations. Assuming that all the **CBSubs™** integration plugins (**CBSubs Content**, **CBSubs iDevAff**, **CBSubs PostAffPro**, **CBSubs GoogleAnalytics** and the **CBSubs Piwik**) were installed (see **Chapters 6.6, 6.15, 6.17, 6.18 and 6.7**), then additional sub-tabs will appear in the Integrations tab area as illustrated in **Figure 56**:

- The Content/Extensions sub-tab,
- The PAP sub-tab,
- The iDevAff sub-tab,
- The GoogleAnalytics tab, and
- The Piwik tab (not shown in figure).

General plugin settings

Here you can set general global settings. Next steps after this on first configuration are to setup payment gateway accounts and subscription plans/products.

License Global Display Credit-cards **Integrations**

Integrations settings (if integrating plugins are loaded):

Following CBSubs integration CB plugins are installed but not published:

PostAffPro iDevAff GoogleAnalytics Content/Extensions

Affiliates tracking on payments: here you can setup your affiliates tracking global settings.

PostAffPro Installation

These variable names must correspond your PostAffPro installation.

PostAffPro URL Path:

PostAffPro Optional Transaction Commission Data

Here you can choose to pass any User Profile field to PostAffPro optional transaction commission data 1-5.

Optional Data 1: CB field:

Optional Data 2: CB field:

Optional Data 3: CB field:

Optional Data 4: CB field:

Optional Data 5: CB field:

Figure 56: General plugin settings → Integrations tab

7.3.8.1 Settings icon → Integration tab → Content/Extensions sub-tab

The Content/Extensions sub-tab appears in the Integration tab of the **Settings** icon area after the successful installation of the *cbplug_int_cbsubscontent-4.1.0.zip* package representing the **CBSubs Content** Integration plugin described in **Chapter 6.15**. This sub-tab has two frames and each frame has one parameter in it.

The first frame is the '**Articles access**' frame that has the following parameter in it:

- **Still show intro text for articles:**


This parameter specifies how **CBSubs™** should treat protected article content. The following options are applicable:


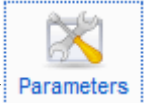
- Yes: articles introductions remain visible
If this parameter is set to Yes, then all teaser portions will be shown even if article is restricted to CBSubs™ plan. Also you should keep in mind that if there is no teaser portion (no 'Read more' link), then the entire article will be hidden/protected.
- No: access to articles introduction is also restricted
- Depends: article are visible only if there is also a "read more" main text


The second frame is the '**Full access granted for**' frame that has one parameter that allows you to select which CMS groups are excluded from the **CBSubs™** ACL system:

- **No access restriction for Group (and above this group):**

This parameter is used to specify which CMS ACL groups are excluded from the **CBSubs™** ACL system.

	What can I really do with this?
<p>You can chose how CBSubs™ article protection appears when viewed by a member that is not subscribed to a plan that provides access. The article may be fully blocked (user will see a registration application instead) or partially blocked (user will see the intro part (if available) of protected content and a message that a subscription is needed). You may also chose to select CMS ACL groups that are excluded from article protection (e.g., members in the Manager group have access to all protected content, even if they are not subscribed to the proper CBSubs™ plan).</p>	

	<h3 style="text-align: center;">Important Joomla settings needed!</h3>
<p>In order for the “teaser” displaying to work, you need to have properly configured your Joomla global settings or your menu item settings to a value of show for the “Read more... link” parameter.</p> <p>For Joomla global parameters you need to navigate to the Article Manager area and</p> <div style="text-align: center;">  </div> <p>click in the parameters icon (Parameters) in order to find the “Read more... link”.</p> <p>For Menu item level over-riding (if menu item is configured to show article content, blog layout, etc.) you need to edit the menu item and find the “Read more... link” parameter in the Parameters (Component) area.</p>	

	<h3 style="text-align: center;">Excluding article protection</h3>
<p>If an article contains the following string:</p> <pre><!-- !CBPAIDaccessCheck --></pre> <p>it will be excluded from protection.</p>	

7.3.8.2 Settings icon → Integration tab → Pap sub-tab

The Pap sub-tab appears in the Integration tab of the **Settings** icon area after the successful installation of the **cbplug_int_cbsubspostafpro-4.1.0.zip** package representing the **CBSubs PostAfPro** integration plugin described in **Chapter 6.18**. This sub-tab illustrated in **Figure 57** has a number of parameters that allow integration with the PAP affiliate system:

- **PAP installation Path:** [initial value: http://]
- **Optional Data1-5: CB field:** [initial value: --- Select Field ---]

This parameter is populated via a drop-down mechanism used to present all CB fields currently available (from your CB Fields Management backend).

The screenshot shows a web-based configuration interface for the 'CB Paid Subscriptions' plugin. The title bar reads 'CB Paid Subscriptions: General plugin settings'. In the top right corner, there are three buttons: 'Save' (with a floppy disk icon), 'Apply' (with a green checkmark icon), and 'Close' (with a red 'X' icon). The main content area is titled 'General plugin settings' and includes a sub-header: 'Here you can set general global settings. Next steps after this on first configuration are to setup payment gateway accounts and subscription plans/products.' Below this, there are four tabs: 'License', 'Global', 'Display', 'Credit-cards', and 'Integrations'. The 'Integrations' tab is selected. Inside the 'Integrations' tab, there is a sub-header: 'Integrations settings (if integrating plugins are loaded):'. Below this, there are three sub-tabs: 'Content/Exter', 'PAP', and 'iDevAff'. The 'PAP' sub-tab is selected. The 'PAP' sub-tab contains the following content: 'Affiliates tracking on payments: here you can setup your affiliates tracking global settings.' followed by a section titled 'PAP Installation' with the instruction 'These variable names must correspond your PAP installation.' and a text input field for 'PAP Install Path:' with the value 'http://'. Below this is a section titled 'PAP Optional Transaction Comission Data' (note the typo) with the instruction 'Here you can choose to pass any User Profile field to PAP optional transaction comission data 1-5.' (note the typo). This section contains five rows, each with a label 'Optional Data 1: CB field:', 'Optional Data 2: CB field:', 'Optional Data 3: CB field:', 'Optional Data 4: CB field:', and 'Optional Data 5: CB field:', each followed by a dropdown menu showing '--- Select Field ---'. At the bottom of the dialog, there is a small text line: 'CB paid subscriptions plugin is commercial software released to customers only under its commercial license.'

Figure 57: General plugin settings → Integrations tab → PAP sub-tab

7.3.8.3 Settings icon → Integration tab → iDevAff sub-tab

The iDevAff sub-tab appears in the Integration tab of the **Settings** icon area after the successful installation of the **cbplug_int_cbsubsidevaf-4.1.0.zip** package representing the **CBSubs iDevAff** integration plugin described in **Chapter 6.17**. This sub-tab illustrated in **Figure 58** has a number of parameters that allow integration with the iDevAff affiliate system:

- **Install Path:** [initial value: http://]
- **Optional iDev Variable #1: CB field:** [initial value: '--- Select Field ---']
This parameter is populated via a drop-down mechanism used to present all CB fields currently available (from your CB Fields Management backend).
- **Optional iDev Variable #2: CB field:** [initial value: '--- Select Field ---']
This parameter is populated via a drop-down mechanism used to present all CB fields currently available (from your CB Fields Management backend).
- **Account for transactions that are:** [initial value: 'Completed: only instant payments']
This parameter is populated via a drop-down mechanism used to present the following options:

- Completed: only instant payments
- Pending and Completed: also for e-checks

CB Paid Subscriptions: General plugin settings

General plugin settings

Here you can set general global settings. Next steps after this on first configuration are to setup payment gateway accounts and subscription plans/products.

License Global Display Credit-cards **Integrations**

Integrations settings (if integrating plugins are loaded):

Content/Extens PAP **iDevAff**

Affiliates tracking on payments: here you can setup your affiliates tracking global settings.

iDev Installation

Install Path:

iDev Cart Integration Optional Variable Values

Here you can choose to pass any User Profile field to iDev optional variable names #1 (recommended: username) and #2 (recommended: email). Optional Variable name #3 value will always be the subscription plan id.

Optional iDev Variable #1: CB field:

Optional iDev Variable #2: CB field:

Remark: If optional iDev Variable #2 is left unassigned, it will contain "Completed" or "Pending" depending on the transaction status (see below too).

Options

iDev only supports users staying on site to pay or returning to your site automatically after completing sale. Thus you need to decide what to do with e-Check pending payments: selecting Completed will miss e-Check payments being unfair to affiliates, selecting Pending might account to affiliates also pending payments which never completed, being unfair to you. In all cases, with iDevAffiliates, you would need to track refunds, reversals manually, as iDevAf doesn't offer such API at release time.

Account for transactions that are:

CB paid subscriptions plugin is commercial software released to customers only under its [commercial license](#).

Figure 58: General plugin settings → Integrations tab → iDevAff sub-tab

7.3.8.4 Settings icon → Integration tab → GoogleAnalytics sub-tab

The GoogleAnalytics sub-tab appears in the Integration tab of the **Settings** icon area after the successful installation of the **cbplug_int_cbsubsgoogleanalytics-4.1.0.zip** package representing the **CBSubs GoogleAnalytics** integration plugin described in **Chapter 6.6**. This sub-tab illustrated in **Figure 59** has two parameters that represent the tracking code of Google Analytics system and the Cross Domain Tracking Domain name parameter.

CB Paid Subscriptions: General plugin settings

General plugin settings

Here you can set general global settings. Next steps after this on first configuration are to setup payment gateway accounts and subscription plans/products.

License Global Display Credit-cards **Integrations**

Integrations settings (if integrating plugins are loaded):

Content/Extens PAP **GoogleAnalytics**

Analytics tracking on payments: here you can setup your analytics tracking global settings.

Google Analytics Tracking Code

Tracking Code:

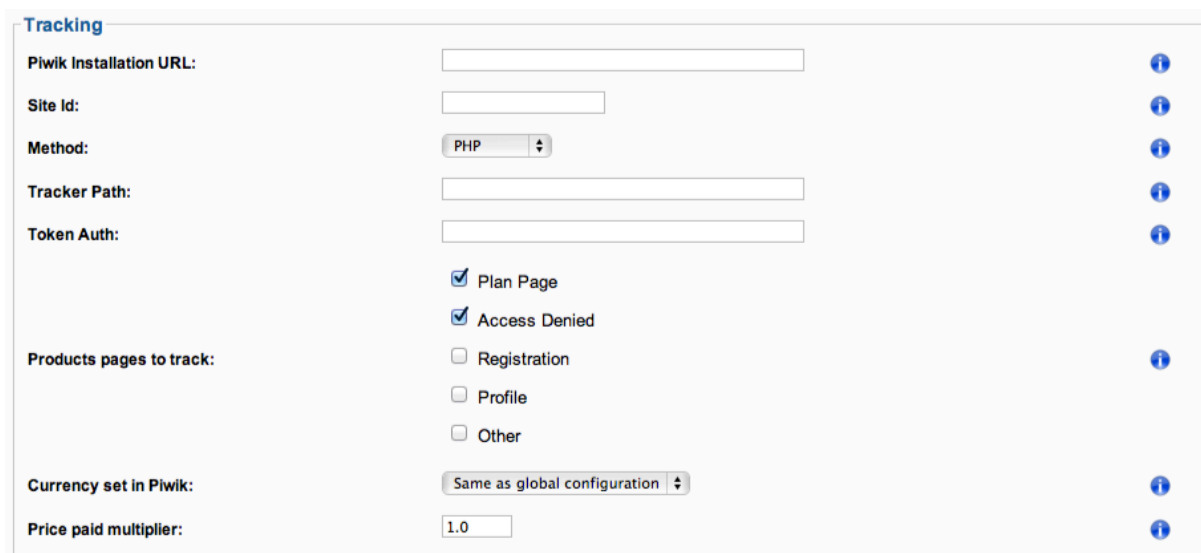
Cross Domain Tracking

Domain Name (optional):

Figure 59: General plugin settings → Integrations tab → GoogleAnalytics sub-tab

7.3.8.5 Settings icon → Integration tab → Piwik sub-tab

The Piwik sub-tab appears in the Integration tab of the **Settings** icon area after the successful installation of the **cbplug_int_cbsubspiwik-4.1.0.zip** package representing the **CBSubs Piwik** integration plugin described in **Chapter 6.7**. This sub-tab has two framed areas as illustrated in Figure 60 and Figure 61.



The screenshot shows the 'Tracking' sub-tab in the integration settings. It contains several configuration fields and checkboxes, each with an information icon (i) to its right:

- Piwik Installation URL:** A text input field.
- Site Id:** A text input field.
- Method:** A dropdown menu currently set to 'PHP'.
- Tracker Path:** A text input field.
- Token Auth:** A text input field.
- Products pages to track:** A section containing four checkboxes:
 - ☒ Plan Page
 - ☒ Access Denied
 - ☐ Registration
 - ☐ Profile
 - ☐ Other
- Currency set in Piwik:** A dropdown menu currently set to 'Same as global configuration'.
- Price paid multiplier:** A text input field with the value '1.0'.

Figure 60: Piwik Tracking framed area

The parameters in the tracking frame are self-explanatory and there are also additional helper descriptions in each parameter tooltip.

Custom Variables

In addition to user substitutions (e.g. [USERNAME], [NAME], etc..) the following basket substitutions are supported: [SITENAME], [SITEURL], [EMAILADDRESS], [INVOICE_ID], [INVOICE_NO], [PROFORMAINVOICE_NO] (only available after payment complete), [ITEMS_NAME], [ITEMS_NUMBERS], [PAYMENT_STATUS], [PAYMENT_METHOD], [DATE_ORDERED], [DATE_TIME_ORDERED], [DATE_PAID], [TRANSACTION_ID], [TRANSACTION_TYPE], [CURRENCY], [TOTAL_PRICE], [TAX_AMOUNT], [ADDRESS_FIRST_NAME], [ADDRESS_LAST_NAME], [ADDRESS_COMPANY], [ADDRESS_STREET], [ADDRESS_CITY], [ADDRESS_STATE], [ADDRESS_ZIPCODE], [ADDRESS_COUNTRY], [ADDRESS_PHONE], [ADDRESS_VAT_NUMBER], and [PAYER_EMAIL]

Custom Variable 1

Name:

Value:

Custom Variable 2

Name:

Value:

Custom Variable 3

Name:

Value:

Custom Variable 4

Name:

Value:

Custom Variable 5

Name:

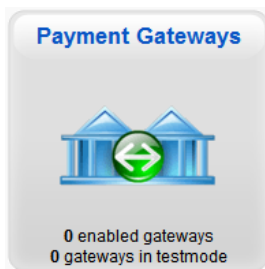
Value:

Figure 61: Piwik Custom Variables framed area

The custom variables frame allows you to configure variables and their values that will be sent to Piwik for tracking purposes. Additional information regarding this Piwik feature can be found in the Piwik.org website.

Please note that additional parameters related to the Piwik integration can be found in the Integrations sub-tab of each of your CBSubs plans.

7.4 Payment Gateways icon area



The **Payment Gateways** icon area is used to configure the various interfaces between the **CBSubs™** system and the organization handling the actual payment processing. Initially, the icon displays a two line informative message in its lower part stating that '0 enabled gateways' and '0 gateways in test-mode' are present. Selecting the **Payment Gateways** icon will reveal

the CB Paid Subscriptions: Payment Gateway Accounts area that is illustrated in **Figure 62**.

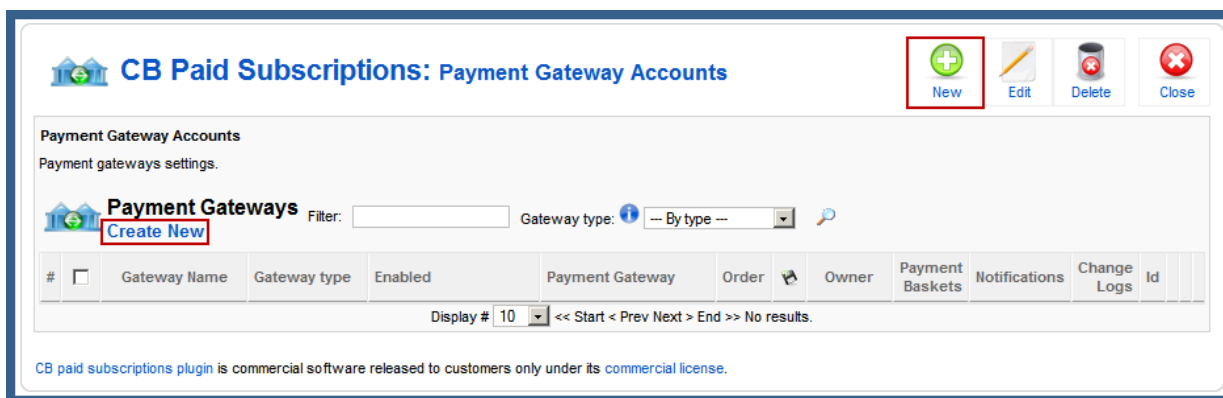


Figure 62: Payment Gateways icon area

Initially there isn't any payment gateway specified and thus there are none displayed in this area. You may initiate the creation of a new payment gateway by either clicking on the **Create New** link or the **New** icon button as visually outlined in **Figure 62**.

Once you initiate the creation of a new payment gateway, you must immediately select the gateway organization from a list of 5 available choices as illustrated in **Figure 63** along with an Off-line gateway and a Dummy-text gateway.

Figure 63: Built-in Gateway type selection

Currently, a **CBSubs™** default installation supports the following 'gateway types' as illustrated in Figure 63:

- **PayPal gateway type:**
PayPal (www.paypal.com) is one of the most popular and successful online payment organizations. Auto-recurring payments are supported.
- **Authorize.net gateway type:**
Authorize.net (www.authorize.net) is one of the most popular US online credit card and electronic checking organizations. Auto-recurring payments are supported.
- **Swiss PostFinance gateway type:**
Swiss Bank online payment processing. Auto-recurring payments are not currently supported.
- **Ogone (www.ogone.com)** is a great and competitive international payment organization that supports many credit cards and also Paypal. Auto-recurring

payments are not currently supported.

- Off-line gateway type:
This gateway is used to handle off-line payments (manual processing).
- Dummy test gateway type:
Internal dummy gateway used to test workflows without going through live payment systems.

You can also download, install and publish extra gateway integration plugins in order to create one of the following additional gateways:

- 2Checkout (www.2checkout.com) is a very popular international online payment organization that is supported in **CBSubs™** by downloading (separately) and installing the 2CheckOut payment integration plugin from the CBSubs download area on JoomlaPolis as described in **Chapter 6.23**. Once the 2CheckOut plugin is installed a new '2CheckOut' option will appear in the "--Choose type --" drop-down field shown in **Figure 63**.
- CCBill (www.ccbill.com) is an international payment organization that is supported in **CBSubs™** by downloading (separately) and installing the CCBill payment integration plugin from the CBSubs download area on JoomlaPolis as described in **Chapter 6.24**. Once the CCBill plugin is installed a new 'CCBill' option will appear in the "--Choose type --" drop-down field shown in **Figure 63**.
- AlertPay (www.alertpay.com) is an international payment organization that is supported in **CBSubs™** by downloading (separately) and installing the AlertPay payment integration plugin from the **CBSubs™** download area on JoomlaPolis as described in **Chapter 6.25**. Once the AlertPay plugin is installed a new 'AlertPay' option will appear in the "--Choose type --" drop-down field shown in **Figure 63**.

- QuickPay (quickpay.net) is an international payment organization that is supported in **CBSubs™** by downloading (separately) and installing the QuickPay payment integration plugin from the **CBSubs™** download area on Joomla! as described in **Chapter 6.26**. Once the QuickPay plugin is installed a new 'QuickPay' option will appear in the “—Choose type —” drop-down field shown in **Figure 63**.
- WorldPay (worldpay.com) is an international payment organization that is supported in **CBSubs™** by downloading (separately) and installing the WorldPay payment integration plugin from the **CBSubs™** download area on Joomla! as described in **Chapter 6.28**. Once the WorldPay plugin is installed a new 'WorldPay' option will appear in the “—Choose type —” drop-down field shown in **Figure 63**.
- CIC Credit Mutuel (www.cmcicpaiement.fr/fr/index.html) is a French payment organization that is supported in **CBSubs™** by downloading (separately) and installing the CIC Credit Mutuel payment integration plugin from the **CBSubs™** download area on Joomla! as described in **Chapter 6.29**. Once the CIC Credit Mutuel plugin is installed a new 'CIC Credit Mutuel' option will appear in the “—Choose type —” drop-down field shown in **Figure 63**.
- DBS EasyPay (www.telemoneyworld.com) is a payment organization popular in Singapore that is supported in **CBSubs™** by downloading (separately) and installing the DBS EasyPay payment integration plugin from the **CBSubs™** download area on Joomla! as described in **Chapter 6.30**. Once the Telemoney EasyPay plugin is installed a new 'Telemoney EasyPay' option will appear in the “—Choose type —” drop-down field shown in **Figure 63**.
- Eway (www.eway.com.au, www.eway.co.uk, www.eway.co.nz) is a payment organization popular in Australia, UK and New Zealand that is supported in **CBSubs™** by downloading (separately) and installing the Eway payment integration plugin from the Joomla! CBSubs download area as described in **Chapter 6.31**. Once the Eway plugin is installed a new 'Eway' option will

appear in the “—Choose type —” drop-down field shown in **Figure 63**.

- Moneris eSELECTplus (www.eselectplus.ca) is a payment organization popular in Canada that is supported in **CBSubs™** by downloading (separately) and installing the Moneris eSELECTplus payment integration plugin from the **CBSubs™** download area on Joomla!polis as described in **Chapter 6.27**. Once the Moneris eSELECTplus plugin is installed a new ‘Moneris eSELECTplus’ option will appear in the “—Choose type —” drop-down field shown in **Figure 63**.

7.4.1 Creating and Configuring a PayPal Gateway

In order to configure your **CBSubs™** PayPal gateway, you must first have a PayPal business account (www.paypal.com).

To create a PayPal account just [CLICK HERE!](#)

PayPal also allows the creation of sandbox accounts. These sandbox accounts have the same look and feel and functionality of live accounts, but they are not live. This allows you to test PayPal payment workflows out without having to use real 'PayPal' money for tests.

Your PayPal business account can be verified by accessing your PayPal "My Account – Overview" tab. A sample illustration (with names and email addressed hidden) is shown in **Figure 64**.

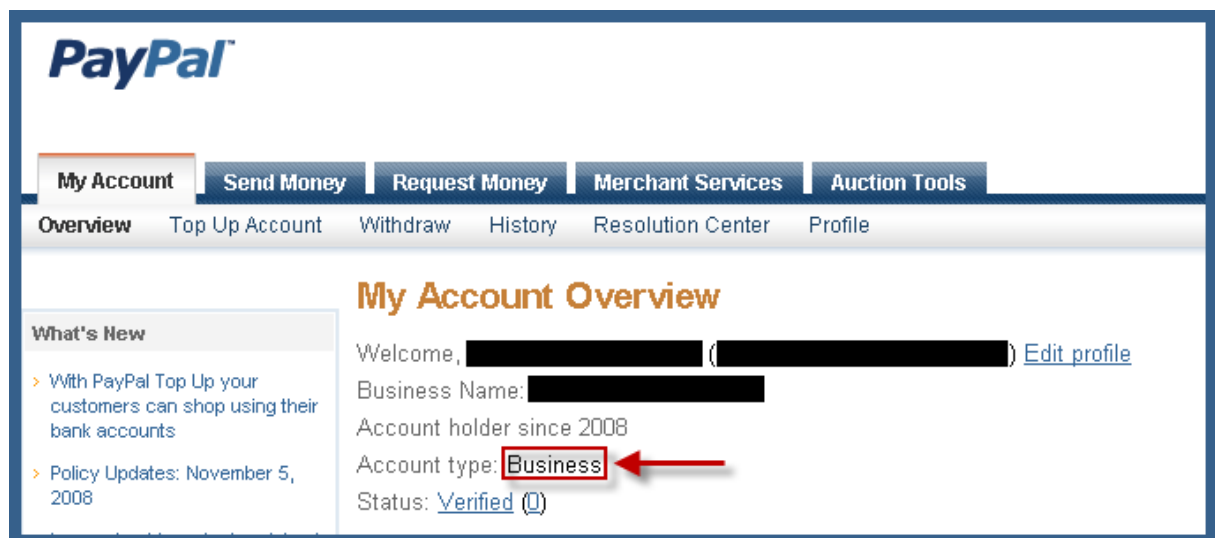


Figure 64: PayPal Business account

This section will not go through the PayPal business account setup process – you should use PayPal documentation to go through the proper process. We have however highlighted some areas that will need special attention and will be referenced during the PayPal gateway setup in **CBSubs™** system. These items are highlighted in **Figure 341**, **Figure 343**, **Figure 342**, **Figure 345** and **Figure 344** of **Chapter 17** and will be referenced during the rest of this section.

Once you click on the **New** button or the **Create New** link shown in **Figure 62**, you will be presented with a drop-down selection mechanism soliciting the payment gateway type (see **Figure 63**). Once you select PayPal from the drop-down list of available gateway types, you will be confronted with additional payment gateway parameters tailored to the PayPal gateway type case. You will see the following parameters:

- **Type of payment gateway:** [fixed value: PayPal]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'PayPal' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My PayPal Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our PayPal Gateway setup screen displays a 'PayPal' framed area with the following parameters:

- **Enable PayPal:** [initial value: No]
This drop-down parameter permits us to specify the mode of operation our 'PayPal' gateway should operate under. There are 4 permissible options:
 - No (default)
By default our 'PayPal' gateway is not enabled – thus is off. If this setting is specified the gateway will not be presented as an option.
 - Enable single payments
Use this setting to enable single PayPal payments.
 - Enable recurring PayPal subscriptions
Use this setting to enable recurring PayPal subscriptions.

- Enable single payments and recurring PayPal subscriptions at user's choice

Use this setting to enable single PayPal payments and allow the user to decide if he/she permits PayPal recurring subscriptions.

- **PayPal Server:** [initial value: Normal PayPal server]

This parameter is populated via a drop-down mechanism permitting the following 2 options:

- Normal PayPal server

Use this option to configure your gateway for 'live' PayPal accounts.

- PayPal Sandbox server

Use this option to configure your gateway to work with the sandbox PayPal server (not live accounts). This setting should really be used just for testing purposes in order to test the PayPal workflows without incurring real PayPal costs.

- **PayPal Business (email or secure merchant id):** [initial value: empty]

This text field parameter should be populated with one of your confirmed email addresses of your PayPal Business account. It does not have to be the primary email address configured on your PayPal Business account, but it could.

Your merchant account id is located on your PayPal → My Account → Profile → Overview → My Business Info → Merchant Account ID and is usually a 13 character string containing uppercase letters and numbers.

- **PayPal Main receiver account (email) (if Business is different from your main account):** [initial value: empty]

This text field parameter may be optionally populated (as an extra security precaution) with your PayPal Business account primary email address. If the PayPal Business parameter (see previous parameter) was set to the primary business account email address, then this setting will be the same.

- **Your PayPal Identity Token:** [initial value: empty]

This text field parameter must be populated with your PayPal Identity Token.

You should be able to find the identity token from your Website Payment Preferences page after logging into your PayPal Business account. See **Figure 344** in **Chapter 17** as a reference screenshot. You can find your token in the 'Payment Data Transfer (Optional)' area of your PayPal Business account Website Payment Preferences page. Make sure to have the 'Payment Data Transfer' option set to 'On' in this 'PayPal Data Transfer' area.

The 'Paypal API credentials (optional)' frame allows you to configure CBSubs™ to handle refunds from the Payment icon area (see **Chapter 7.8**). The framed area is illustrated in Figure 65.

PayPal API credentials (optional)

PayPal API is optional and only needed if:
You want to do refunds from within CBSubs (if you refund from Paypal, CBSubs will be notified by IPNs anyway),
You wish that users can cancel auto-recurring Paypal payments subscriptions from within CBSubs, and that CBSubs unsubscribes automatically autorecurring payments in case of plan upgrades. Otherwise a manual unsubscribe at paypal.com by the user is needed. This auto-recurring payment subscriptions unsubscriptions feature requires the PayPal 'Enhanced Recurring Payments' (ERP) Option on your Paypal account (available in certain countries only).
You can get your PayPal API Username, API Password and API Signature from your PayPal account in 'My account - Profile - My selling tools - API access - Request API credentials - Request API signature. Please review the PayPal API agreement, that must be accepted to access the API, for compliance. Make sure to use https (SSL) to access this administration area and to restrict its access to a 'Need to know' basis, as these Paypal account credentials must stay confidential.

To activate the ERP option: Click on Merchant services, Click on Subscribe under Create Buttons, Select 'Automatic Billing' (visible only if ERP is available in your country and for your Paypal account) under 'Choose a button type' drop down menu, Under 'Enhanced Recurring Payments' click on 'Learn more', Click 'Sign up' and follow the steps on the page to complete the sign-up process.

PayPal account API Username: ⓘ

PayPal account API Password: ⓘ

PayPal account API Signature: ⓘ

PayPal country language: Default of the paypal account ⓘ

Figure 65: Paypal API credentials framed area

Depending on your country origin, Paypal supports the 'Enhanced Recurring Payments' (ERP) option that will add more automated functionality in CBSubs™ to deal with auto-recurring cancellations and refund handling.

In order to configure your Paypal API on CBSubs™, you need first to sign-up for the ERP option on Paypal and get your API Username, Password and Signature values. To do this from your Paypal account page you need to click on the Update link in your Paypal My Selling tools area of your profile as illustrated in Figure 66.

PayPal

My Account Send Money Request Money Merchant Services Auction Tools

Overview Top Up Withdraw History Resolution Center **Profile**

My Profile

- My business info > Email, address, phone, more.
- My money > Banks, credit cards, more.
- My settings > Notifications, customer ID, more.
- My selling tools >** Getting paid, shipping, more.

eBay ID	Link my eBay ID to my PayPal account.	Update
Selling online		
PayPal buttons	Manage my payment buttons.	Update
Credit card statement name	My business name on card statements is: [REDACTED]	Update
Sales tax	Set up sales taxes for multiple regions.	Update
Custom payment pages	Set up PayPal payment pages to look like my website.	Update
Website preferences	Return customers to my website after they pay with PayPal.	Update
API access	Manage API credentials to integrate my PayPal account with my online store or shopping cart.	Update
Invoice templates	Create and manage my invoices.	Update
Getting paid and managing my risk		
My automatic payments	Manage the subscriptions and automatic payments that I offer my customers.	Update
Instant payment notifications	Integrate PayPal payment notifications with my website.	Update
Block payments	Limit payments, add instructions, and more.	Update
Customer service message	Create a personalised message for customer disputes.	Update
Shipping my items		
Shipping calculations	Create unique shipping methods for each customer.	Update
More selling tools		
Encrypted payment settings PayPal button language encoding Seller reputation number		

Figure 66: Paypal My selling tools page

You will then be presented with the Paypal API access page as illustrated in Figure 67. Here you need to select option 2 to request API credentials.

PayPal

My Account | **Send Money** | **Request Money** | **Merchant Services** | **Auction Tools**

Overview | Top Up | Withdraw | History | Resolution Center | **Profile**

API Access [Back to My Profile](#)

An API (Application Programming Interface) allows PayPal software to communicate with your online store or shopping cart.

Setting up API permissions and credentials

Choose one of the following options to integrate your PayPal payment solution with your online store or shopping cart.

Option 1 - Grant API permissions to a third party to use certain PayPal APIs on your behalf.

Choose this option if:

- You are using a pre-integrated shopping cart, hosted by a third party
- Your website is hosted and managed by a third-party service provider

[Grant API permission](#)

Option 2 - Request API credentials to create your own API username and password.

This option applies to:

- Custom websites and online stores
- Pre-integrated shopping carts running on your own server

[Request API credentials](#)

Accept payments from your online stores before setting up APIs

[Enable Express Checkout](#) to accept payments from your online stores right away. You can set up API permissions or credentials later.

Questions?

If you're not sure about setting up APIs, ask your shopping cart provider or website developer. [Learn more](#) about PayPal API concepts and terminology.

Figure 67: Paypal API Access page

On the Paypal Request API Credentials page you should select the Request API Signature radio option and click on the Agree and Submit button as illustrated in Figure 68.

PayPal

My Account | **Send Money** | **Request Money** | **Merchant Services** | **Auction Tools**

Overview | Top Up | Withdraw | History | Resolution Center | Profile

Request API Credentials [Back to Profile Summary](#)

API credentials consist of three elements:

- An API username
- An API password
- Either an API signature or an API SSL client-side certificate

If you're using a shopping cart or solution provider, ask whether you need an API signature or a certificate.

☒ **Request API signature** if your shopping cart or solution provider has asked for an API username, password, and signature, or if you're developing a custom shopping cart.

☐ **Request API certificate** if your shopping cart or solution provider requires a file-based certificate.

Need help deciding which credential is right for your needs? [Learn more](#)

By clicking **Agree and Submit**, I agree to the [API License Agreement and Terms of Use](#).

Agree and Submit | Cancel

Figure 68: Paypal Request API Credentials page

You will finally be presented with your credentials on the Paypal View or Remove API Signature page as illustrated in Figure 69.

You need to copy and paste the relevant data from this page to your **CBSubs™** Paypal Gateway settings parameters.

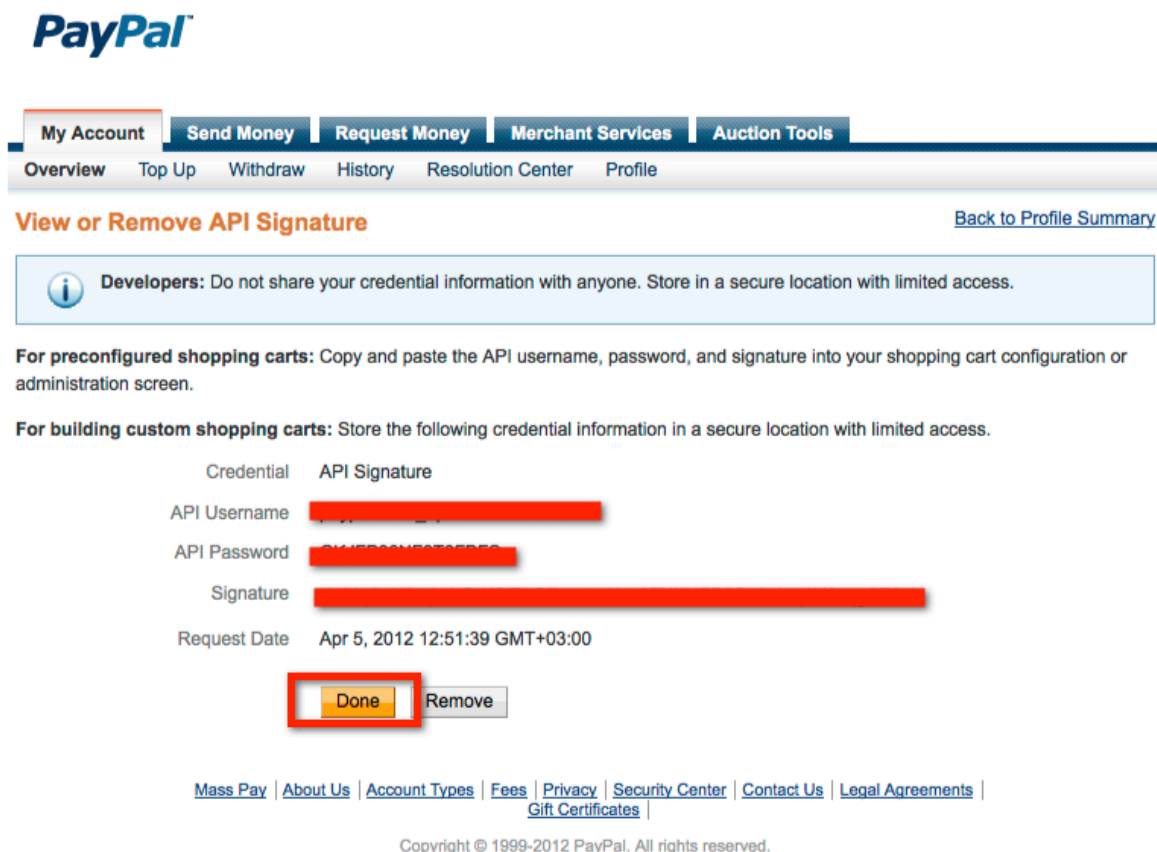


Figure 69: Paypal View or Remove API Signature page

- **PayPal country language:** [initial value: Default of PayPal account]
This drop-down field parameter is initially configured to follow the default setting of your PayPal account. You can over-ride it if you want but in most cases it will most likely be set to the default value.

If your Settings → Global tab has been configured to accept multiple currencies during checkout (see **Chapter 7.3.1.4**), the PayPal payment gateway setup continues with a 'Currencies accepted' framed area that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]
This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.

- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]

This parameter allows you to instruct **CBSubs™** how to handle the case of basket currency not supported by payment organization. It is a drop-down field parameter accepting one of the following values:

- Hide this method if basket currency mismatches
This means that Gateway should not be proposed as a payment method if the currency is not supported
- Ask if user wants to convert basket currency to pay
This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that the Gateway supports. With this value selected an extra text parameter will be presented 'Confirmation text to ask user for conversion:'

Depending on the setting specified for the 'Enable PayPal' parameter above the 'Presentation' frame of your **CBSubs™** PayPal Payment Gateway setup will contain one, two or no icon sets. You can select the appropriate icon button that best suits your site or you can use your own by populating the '**Custom Payment Button Text or Image:**' parameter just below the icon set.

The '**Access settings**' framed area contains a single drop-down select parameter to specify which CMS access level is allowed to view this gateway. Default setting is Public.

The next framed parameter section named General Settings has two parameters:

- **CSS class (e.g. 'cbreg_green cbreg_admin_green'):** [initial value: empty]
This text field parameter allows you to specify the format (expressed via a specific CSS class) that will be used when presenting gateway payments. There are two types of CSS classes predefined: the frontend class and the backend class (this has the `_admin_` part in its name). Predefined classes that may be used include:

- cbreg_green cbreg_admin_green
 - cbreg_red cbreg_admin_red
 - cbreg_orange cbreg_admin_orange
 - cbreg_blue cbreg_admin_blue
 - cbreg_cyan cbreg_admin_cyan
 - cbreg_yellow cbreg_admin_yellow
 - cbreg_magenta cbreg_admin_magenta
- **Owner Id (only supported: 0 for now):** [initial value: 0]
This is the owner of current gateway account value. At present only 0 value (system) is supported.

Finally, another set of parameters in the 'PayPal specific settings' frame must be populated as follows:

- **Logo image (150 x 50px):** [initial value: --- Use default image ---]
The logo image to be use is specified here via a drop-down mechanism.
Permissible settings include:
 - --- Use default image ---
 - --- Do not use an image ---
 - Set of image files taken from your Joomla images folder.
- **Subscriber's note:** [initial value: Disallow]
This parameter is used to permit or disallow personal notes to be solicited during the payment process from your subscriber. Allowable options are:
 - Disallow
 - Allow
- **Shipping address:** [initial value: Ask for shipping address at PayPal]
Allowable options are:
 - Ask for shipping at PayPal
 - Do not ask for shipping at PayPal

- **Encrypt paypal form:** [initial value: Plain-text form]

Allowable options are:

- Plain-text form

Use this option if you do not want secure forms processing between your website and your PayPal Business account. In order for this setting to work with your PayPal Business account, the 'Block Non-encrypted Website Payment' setting of your PayPal Business account 'Website Payment Preferences' section must be set to 'Off'. See **chapter 17** and specifically **Figure 344**.

- Encrypted form

Use this option if you want to use secure form processing protocols between your website and your PayPal Business account. In order for this setting to work with your PayPal Business account, the 'Block Non-encrypted Website Payment' setting of your PayPal Business account 'Website Payment Preferences' section must be set to 'On'. See **chapter 17** and specifically **Figure 344**. Additionally, if this option is specified a number of extra parameters and actions must take place in order to complete the secure setup.

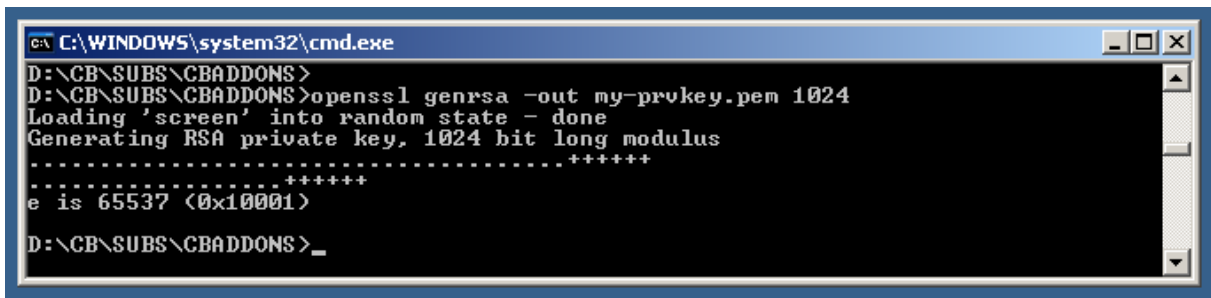
- **Notification host (leave blank):** [initial value: empty]

Note: Encrypting the PayPal forum (using the parameter '**Encrypt PayPal form:**' set to 'Encrypted form') is used only to hide out of the form the PayPal email of seller and hide sales details against hacking-attempts. However if a user hacks the form (e.g. lowering the price), **CBSubs™** will detect it and mark the notification as fraudulent, ignoring the payment. CBSubs™ checks with PayPal every transaction automatically before accepting, and also checks against its server-side database-stored payment basket too. So tampering a payment can't succeed.

Adding encryption is not a simple task, and not needed in 99% of the cases.

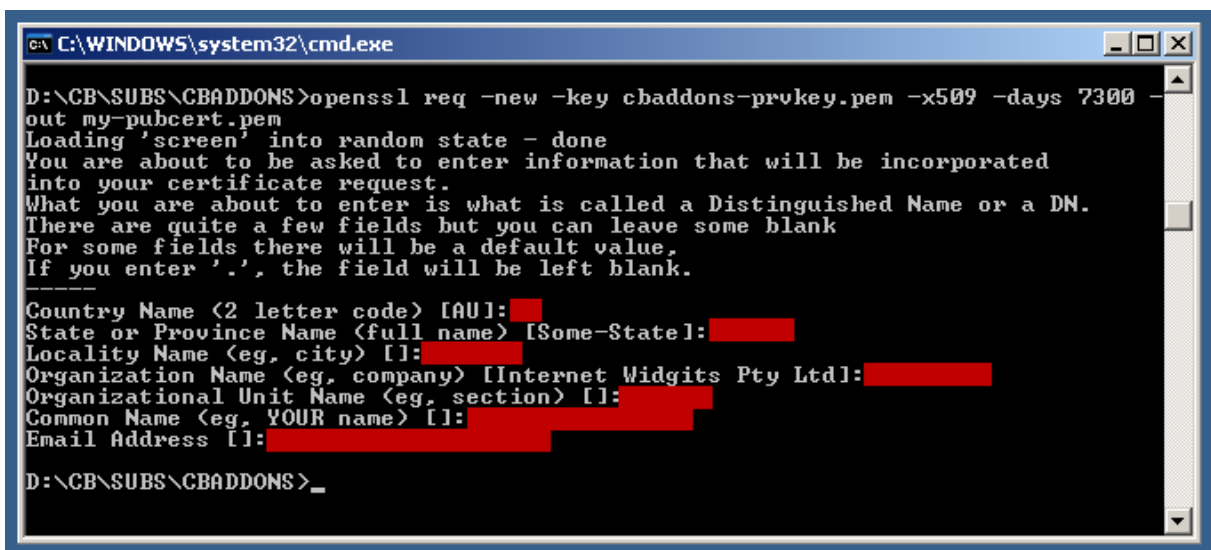
As mentioned above, if you have chosen to use 'Encrypted form' processing (option for '**Encrypt PayPal form:**' parameter) a set of additional parameter settings will appear as a 'PayPal Certificate' framed area in your **CBSubs™** PayPal Gateway setup backend. Along with these parameters you will see a list of steps that should be performed. These documented steps are also included here for your reference:

1. Click on Encrypted Payment Settings: In PayPal Public Certificate, click the "Download" button,
2. Upload that downloaded file to your server and set the full path to this file on your server in the field 'PayPal Public Certificate File' below.
3. Generate a private key using **OPENSSL** with the following command:
Your own private key file: `openssl genrsa -out my-prvkey.pem 1024`
(you may of course substitute the output file name from my-prvkey.pem to a name of your choosing) – See **Figure 70** for an sample WINDOWS DOS **OPENSSL** execution used to generate private key.
4. Generate your own public certificate file using openSSL with the following command:
`openssl req -new -key my-prvkey.pem -x509 -days 7300 -out my-pubcert.pem`
(change the values after 'days' from 7300 (20 years) to the duration you want the system to work before your own certificate expires and having to renew the certificate – you may of course substitute the private key filename used as input and the output filename you your liking) – See **Figure 71** for example of using **OPENSSL** on a windows environment to generate a certificate.
5. Upload both files to your web server, for private key at least outside the directories accessible by http, but inside the directories accessible by PHP.
6. Then put full files paths below for your private key and public certificate files.
7. Finally, login to your PayPal account, go to Profile - Selling Preferences - Encrypted Payment Settings - Website Payments Certificates - Your Public Certificates - click 'Add' and upload your public certificate (see **Figure 345**).
8. Copy the then appearing 'Cert Id' from PayPal to the corresponding field below. The 'Cert Id' will appear in your PayPal page after you upload the certificate file generated in step 4 above (see **Figure 345**).
9. Once tested, If you wish, you can then block non-encrypted website payments in PayPal, in Profile - Selling Preferences - Website Payment Preferences - Encrypted Website Preferences - Block Non-encrypted – Save (see **Figure 344**).



```
C:\WINDOWS\system32\cmd.exe
D:\CB\SUBS\CBADDONS>
D:\CB\SUBS\CBADDONS>openssl genrsa -out my-prvkey.pem 1024
Loading 'screen' into random state - done
Generating RSA private key, 1024 bit long modulus
.....++++++
.....++++++
e is 65537 (0x10001)
D:\CB\SUBS\CBADDONS>_
```

Figure 70: Using OPENSSL to generate private key



```
C:\WINDOWS\system32\cmd.exe
D:\CB\SUBS\CBADDONS>openssl req -new -key cbaddons-prvkey.pem -x509 -days 7300 -
out my-pubcert.pem
Loading 'screen' into random state - done
You are about to be asked to enter information that will be incorporated
into your certificate request.
What you are about to enter is what is called a Distinguished Name or a DN.
There are quite a few fields but you can leave some blank
For some fields there will be a default value,
If you enter '.', the field will be left blank.
-----
Country Name (2 letter code) [AU]: 
State or Province Name (full name) [Some-State]: 
Locality Name (eg, city) []: 
Organization Name (eg, company) [Internet Widgits Pty Ltd]: 
Organizational Unit Name (eg, section) []: 
Common Name (eg, YOUR name) []: 
Email Address []: 
D:\CB\SUBS\CBADDONS>_
```

Figure 71: Using OPENSSL to generate Certificate from Private Key

Following the 9 step process outlined above we can continue populating the remaining parameters needed to complete our **CBSubs™** PayPal Gateway setup:

- **PayPal Public Certificate File:** [initial value: empty]

This text field parameter should be populated with a full path filename of the PayPal certificate downloaded from your PayPal Business account (see step 1 above) and uploaded to your website (see step 2 above). This full path is not a URL. You can see the full path to your website from your Joomla 1.5.x Global Configuration backend (System – see your Path to Log folder variable).

- **Your own Private Key file:** [initial value: empty]

This text field parameter should be populated with a full path filename of your private key file that was generated in step 3 above using **OPENSSL** on your

local machine (PC, Mac, etc.) and uploaded to your website in step 5. This full path is not a URL. You can see the full path to your website from your Joomla 1.5.x Global Configuration backend (System – see your Path to Log folder variable).

- **Your own Public Certificate file:** [initial value: empty]

This text field parameter should be populated with a full path filename of your public certificate file that was generated in step 4 above using **OPENSSL** on your local machine (PC, Mac, etc.) and uploaded to your website in step 5. This full path is not a URL. You can see the full path to your website from your Joomla 1.5.x Global Configuration backend (System – see your Path to Log folder variable).

- **Password for your private key:** [initial value: empty]

This text field parameter should be populated with the password used during the generation of the private key in step 3 above using **OPENSSL** on your local machine. Note that we have not used a password when generating our private key, so in our case this will be empty.

- **PayPal Cert ID for your uploaded public certificate:** [initial value: empty]

This text field parameter should be populated with the value generated by PayPal after you upload the public certificate generated in step 4 using **OPENSSL** on your local machine. See **Figure 345** for reference regarding where to find this ID on PayPal.

Note: PayPal IPN (Instant Payment Notification) is used to communicate PayPal events to CBSubs™. When a PayPal event takes place (e.g., payment success, payment reversal, etc.) a PayPal IPN message is generated and communicated with CBSubs™ using direct URL Post method. Any SEF component that attempts to redirect the PayPal IPNs will result in IPN failures as redirecting will lose the POST values.

7.4.2 Creating and Configuring an Authorize.net Gateway

The Authorize.net payment organization (www.authorize.net) is a popular agency handling credit cards payments (Visa and MasterCard) in the U.S.A.

In order to configure your **CBSubs™** Authorize.net gateway, you must first have a Authorize.net account.

[To create an Authorize.net account just CLICK HERE!](#)

Authorize.net also allows the creation of test/developer accounts. These accounts have the same look and feel and functionality of live accounts, but they are not live. This allows you to test Authorize.net payment workflows out without having to use real money for tests.

Once you click on the **New** button or the **Create New** link shown in **Figure 62**, you will be presented with a drop-down selection mechanism soliciting the payment gateway type (see **Figure 63**). Once you select Authorize.net from the drop-down list of available gateway types, you will be confronted with additional payment gateway parameters tailored to the Authorize.net gateway type case. You will see a similar screen as the one depicted in **Figure 72** requesting the following parameters:

- **Type of payment gateway:** [fixed value: Authorize.net]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'Authorize.net' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My Authorize.net Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with

respect to other payment gateways created.

Payment gateway settings

Type of payment gateway: Authorize.net

Name of gateway account:

Ordering: 2 last

Gateway account settings

Gateway-specific settings:

Enable Authorize.net: No

Authorize.net server: Normal Authorize.net servers

Authorize.net name (API login id):

Authorize.net transaction key:

Authorize.net MDS Hash:

Settings for silent Posts from Authorize.net

Using silent posts is optional but recommended. It is direct posts from Authorize.net's server to your server whenever a payment is made or voided at Authorize.net. For auto-recurring ARB payments, this means that CBSubs will know for each payment, add a payment transaction record for the payment or refund, and extend subscription at each successful payment.

Silent Post URL notifications to set into authorize.net: First fill-in parameters above, then "Apply" this new gateway settings: Then this URL id will be computed and displayed.

Once you have set the silent post URL at authorize.net you will need to change this setting here too:

Silent Post URL above is: not configured

Presentation

Ask for card billing address for AVS: No

Payment Button type: ☐ Names of credit cards text ☒ Credit-cards Logo images

Payment Choice type: ☐ Names of credit cards text ☒ Credit-cards Logo images

Custom button text/image:

Accepted credit cards: ☒ Visa ☒ Mastercard ☐ American Express ☐ Discover ☐ Diners Club International ☐ JCB

General settings

CSS class (e.g. 'cbreg_green cbreg_admin_green'):

Owner id (only supported: 0 for now): 0

Figure 72: Authorize.net Gateway setup

After the (above) 3 parameters, our Authorize.net Gateway setup screen displays a framed area with the following Gateway specific parameters:

- **Enable Authorize.net:** [initial value: No]

This drop-down parameter permits us to specify the mode of operation our 'Authorize.net' gateway should operate under. There are 4 permissible options:

- No (default)
By default our new 'Authorize.net' gateway is not enabled – thus is off. If this setting is specified the gateway will not be presented as an option.
- Yes: AIM: Single Billing per payment
Use this setting to enable single billing payments.
- Yes: AIM+ABR: Automated Recurring Billing for auto-recurring plans
Use this setting to enable recurring Authorize.net billing.

- Yes: AIM+ABR: Single payments or Automated Recurring Billing at user's choice for autorecurring plans

Use this setting to enable single Authorize.net payments and allow the user to decide if he/she permits Authorize.net recurring billing for autorecurring subscription plans.

- **Authorize.net Server:** [initial value: Normal Authorize.net server]

This parameter is populated via a drop-down mechanism permitting the following 2 options:

- Normal Authorize.net server

Use this option to configure your gateway for 'live' Authorize.net accounts.

- Authorize.net developer test servers

Use this option to configure your gateway to work with the developer / test Authorize.net server (not live accounts). This setting should really be used just for testing purposes in order to test the Authorize.net workflows without incurring real payment costs.

- Other server compatible with Authorize.net

Use this option to configure a gateway that emulates the Authorize.net protocol. When you select this option two extra parameter fields will appear:

- Server AIM submission URL

This should be the authorize.net compatible server equivalent of <https://secure.authorize.net/gateway/transact.dll> link.

- Server ARB submission URL

This should be the authorize.net compatible server equivalent of <https://api.authorize.net/xml/v1/request.api> link.

- **Authorize.net name (API login id):** [initial value: empty]

This text field parameter should be populated with your Authorize.net merchant authentication called your **API login id**. This information can be obtained by visiting the [API Login ID and Transaction Key](#) hyperlink from your Authorize.net **Account** page once you have logged into your

Authorize.net account. This hyperlink location is illustrated in **Figure 73**. The

API Login ID is typically comprised of 11 characters (including digits, lower and uppercase letters). You can see the typical location of the API Login ID in **Figure 74**.

- **Authorize.net transaction key:** [initial value: empty]

This text field parameter should be populated with your Authorize.net transaction key. This information can be obtained by visiting the [API Login ID and Transaction Key](#) hyperlink from your Authorize.net **Account** page once you have logged into your Authorize.net account. This hyperlink location is illustrated in **Figure 73**. You can generate a new Transaction Key from your API Login ID and Transaction Key page by answering your secret question. New key generation will automatically render the old one useless (either immediately or within 24 hours). You can see the process involved to generate a new key illustrated in **Figure 74**.

- **Authorize.net MD5 Hash:** [initial value: empty]

This text field parameter should be populated with your Authorize.net MD5 hash value. To find this value you must visit your Authorize.net Account page and look in Settings / Security Settings: General Security Settings: MD5 Hash. You can see this link illustrated in **Figure 73**.

The screenshot shows the Authorize.Net account management interface. The top navigation bar includes links for Feedback, Contact Us, Help, and Log Out. The main navigation menu on the left lists Home, Tools, Reports, Search, and Account. The Account menu is expanded, showing a list of settings categories: Settings, Merchant Profile, Billing Information, Statements, User Administration, and User Profile. The Settings section is active, displaying a list of configuration options organized into four main categories: Transaction Format Settings, Security Settings, Business Settings, and a Help link. Under Transaction Format Settings, there are links for Transaction Submission Settings (Virtual Terminal, Payment Form, Upload Transaction File Format) and Transaction Response Settings (Transaction Version, Receipt Page, Relay Response, Response/Receipt URLs, Silent Post URL, Direct Response, Email Receipt, FDS Customer Response). Under Security Settings, there are links for Basic Fraud Settings (Card Code Verification, Address Verification Service, Daily Velocity, Cardholder Authentication) and General Security Settings (Test Mode, MD5-Hash, Password-Required Mode, File Upload Capabilities, Enable WebLink Connection Method, API Login ID and Transaction Key). Under Business Settings, there are links for General Information Settings (Transaction Cut-Off Time, Time Zone, QuickBooks Download Report Settings).

Figure 73: Authorize.net Account page

The screenshot shows the Authorize.Net API Login ID and Transaction Key page. The top navigation bar includes links for Feedback, Contact Us, Help, and Log Out. The main navigation menu on the left lists Home, Tools, Reports, Search, and Account. The Account menu is expanded, showing a list of settings categories: Settings, Merchant Profile, Billing Information, Statements, User Administration, and User Profile. The Settings section is active, displaying the API Login ID and Transaction Key page. The page contains the following information: A paragraph explaining that the API Login ID and Transaction Key are unique pieces of information specifically associated with your payment gateway account. However, the API login ID and Transaction Key are NOT used for logging into the Merchant Interface. These two values are only required when setting up an Internet connection between your e-commerce Web site and the payment gateway. They are used by the payment gateway to authenticate that you are authorized to submit Web site transactions. An IMPORTANT note stating that the API Login ID and Transaction Key should not be shared with anyone. Be sure to store these values securely and change the Transaction Key regularly to further strengthen the security of your account. A link to the Reference & User Guides or contact your Web developer. A section for the API Login ID and Transaction Key, with a red box highlighting the API Login ID field and a red arrow pointing to it. The API Login ID is 02/19/2007 15:11:52. The Transaction Key is 02/19/2007 15:12:00. A section for creating a new Transaction Key, with a red box highlighting the Secret Answer field. The Secret Answer is 02/19/2007 15:12:00. A checkbox for Disabling Old Transaction Key(s) is present. Submit and Cancel buttons are at the bottom.

Figure 74: Authorize.net API Login ID and Transaction Key page

Finally, another Authorize.net gateway specific parameter is available for configuration as illustrated in **Figure 75**. The 'Settings for silent Posts from Authorize.net' frame contains the '**Silent Post URL above is:**' drop-down parameter that can be set to 'not configured' or 'set at Authorize.net'.

Using silent posts is optional but recommended. It is direct posts from Authorize.net's server to your server whenever a payment is made or voided at Authorize.net. For auto-recurring ARB payments, this means that CBSubs will know for each payment, add a payment transaction record for the payment or refund, and extend subscription at each successful payment.

A URL is automatically generated in this section that needs to be copied/pasted to your Authorize.net admin area in your **Account / Settings / Transaction format settings: Transaction Response Settings: Silent Post URL parameter**.

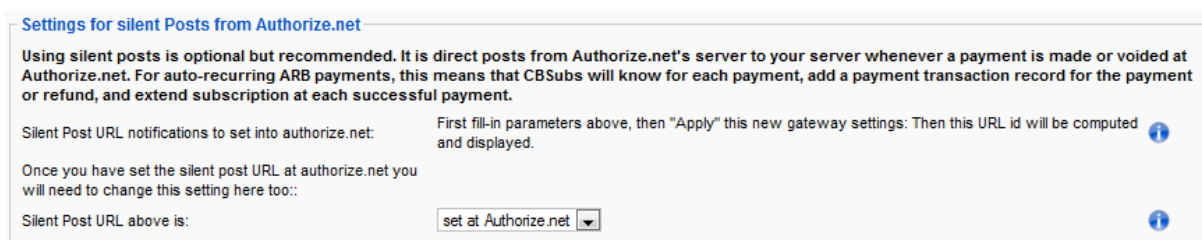


Figure 75: Authorize.net settings for silent posts

The Authorize.net payment gateway setup continues with a 'Currencies accepted' framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and 'Allow currency selection at checkout:' is enabled – see **Chapter 7.3.1.4**) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]
This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.
- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]
This parameter allows you to instruct **CBSubs™** how to handle the case of basket currency not supported by payment organization. It is a drop-down field

parameter accepting one of the following values:

- Hide this method if basket currency mismatches
This means that Gateway should not be proposed as a payment method if the currency is not supported
- Ask if user wants to convert basket currency to pay
This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that the Gateway supports. With this value selected an extra text parameter will be presented 'Confirmation text to ask user for conversion:'

After populating these Authorize.net specifically retrieved values, you need to populate the parameters displayed in the Presentation frame illustrated in **Figure 72**. These parameters are:







- **Description shown when radio is selected:** [initial value: empty]
This text area field parameter is used to populate description text that is to be shown when user is prompted to click on Authorize.net specific proposed payment methods.
- **Ask for card billing address for AVS:** [initial value: No]
This drop-down parameter field can be populated with one of the following 3 settings:
 - No (default)
CBSubs™ should not ask for card billing address for Address Verification Service.
 - ZIP-code + country
CBSubs™ will use ZIP code and Country to send to gateway AVS service.
 - Street-address + ZIP-code + country
CBSubs™ will use street address, ZIP code and Country and send these values to the payment gateway AVS service.

Note: This is a very important parameter as Authorize.net has different fees depending on these settings. You should consult the Authorize.net website for details.

- **Payment Button Type:** [initial value: Credit-cards Logo images selected]
This one of two options radio field parameter permits us to specify how the payment button will be presented with regard to the various credit card choices during our **CBSubs™** Authorize.net checkout process. The 2 permissible options are:
 - Credit-cards Logo images (default)
By default our new 'Authorize.net' gateway will present the various applicable credit card choices as payment button logo images during the checkout process.
 - Names of credit cards text
Selecting this option will present text names of the applicable credit card entities as payment buttons during the checkout process

- **Payment Choice Type:** [initial value: Credit-cards Logo images selected]
This one of two options radio field parameter permits us to specify how the payment choice will be presented with regard to the various credit card choices during our **CBSubs™** Authorize.net checkout process. The 2 permissible options are:
 - Credit-cards Logo images (default)
By default our new 'Authorize.net' gateway will present the various applicable credit card choices as payment choice logo images during the checkout process.
 - Names of credit cards text
Selecting this option will present text names of the applicable credit card entities as payment choices during the checkout process

- **Accepted credit cards:** [initial value: Visa and Mastercard selected]
This multiple checkbox field parameter permits us to specify exactly which credit cards we should accept during the payment process. The available options (one or more may be selected) include:

- Visa (default) 
- Mastercard (default) 
- American Express 
- Discover 
- Diners Club International 
- JCB 

The '**Access settings**' framed area contains a single drop-down select parameter to specify which CMS access level is allowed to view this gateway. Default setting is Public.

The final framed parameter section named General Settings has two parameters:

- **CSS class (e.g. 'cbreg_green cbreg_admin_green'):** [initial value: empty]
This text field parameter allows you to specify the format (expressed via a specific CSS class) that will be used when presenting gateway payments. There are two types of CSS classes predefined: the frontend class and the backend class (this has the `_admin_` part in its name). Predefined classes that may be used include:
 - `cbreg_green cbreg_admin_green`
 - `cbreg_red cbreg_admin_red`
 - `cbreg_orange cbreg_admin_orange`
 - `cbreg_blue cbreg_admin_blue`
 - `cbreg_cyan cbreg_admin_cyan`
 - `cbreg_yellow cbreg_admin_yellow`
 - `cbreg_magenta cbreg_admin_magenta`
- **Owner Id (only supported: 0 for now):** [initial value: 0]
This is the owner of current gateway account value. At present only 0 value (system) is supported.

The **CBSubs™** Authorize.net payment gateway implementation supports AVS for both single payments and recurring ones. Default address is taken from the invoice address.

More information regarding Authorize.net is available at the [Authorize.net](https://authorize.net) website.

7.4.3 Creating and Configuring a 2Checkout Payment Gateway

The **2Checkout** (2CO) organization (www.2checkout.com) is an ‘authorized’ reseller for over 1.6 million tangible or digital products and services. Web businesses (suppliers/vendors) agree to sell their goods and services to 2CO for immediate resale.

The **2Checkout** payment organization is supported in **CBSubs™** by downloading and installing the **2Checkout** payment integration plugin as described in **Chapter 6.23**.

In order to configure your **CBSubs™ 2Checkout** gateway, you must first have a **2Checkout** account.

To create a 2Checkout account just [CLICK HERE!](#)

Once you click on the **New** button or the **Create New** link shown in **Figure 62**, you will be presented with a drop-down selection mechanism soliciting the payment gateway type (see **Figure 63**). Once you select ‘2Checkout’ from the drop-down list of available gateway types, you will be confronted with additional payment gateway parameters tailored to the **2Checkout** gateway type case. You will be prompted to complete the following parameters:

- **Type of payment gateway:** [fixed value: 2Checkout]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value ‘2Checkout’ and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like ‘My 2CO Gateway’.

- **Ordering:** [initial value:]

This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our 2Checkout Gateway setup screen displays a framed area with the following parameters:

- **Enable 2Checkout:** [initial value: No]

This drop-down parameter permits us to specify the mode of operation our '2Checkout' gateway should operate under. There are currently 2 permissible options:

- No (default)

By default our new '2Checkout' gateway is not enabled – thus is off. If this setting is specified the gateway will not be presented as an option.

- Enable recurring subscriptions (requires existing product ids at 2CheckOut)

Use this setting if you want to enable auto-recurring payments. You must create products in your 2CheckOut account for each CBSubs plan that is set to auto-recurring pricing and you must configure your plan's 2CheckOut sub-tab appropriately.

- Enable single payments and recurring payments at user's choice

Use this setting to allow end user to select if auto-recurring payment should be authorized or single payment. You must create products in your 2CheckOut account for each CBSubs plan that is set to auto-recurring pricing and you must configure your plan's 2CheckOut sub-tab appropriately.

- Enable single payments

Use this setting to enable single billing payments.

- **2Checkout Demo/Test-mode:** [initial value: Normal 2Checkout normal mode]

This parameter is populated via a drop-down mechanism permitting the following 3 options:

- Normal 2Checkout normal mode
Use this option to configure your gateway for 'live' normal mode operations.
- Test Demo mode
Use this option to configure your gateway to work with in demo mode. This setting should be used just for testing purposes in order to test the 2CO ↔ **CBSubs**™ workflows without incurring real payment costs.
- Other server compatible with 2Checkout
This mode is used to configure other gateway organizations that have emulated/copied the 2Checkout model. When you select this option you will be presented with two additional fields:
 - Server submission URL: [initial value: empty]
This text field parameter should be populated with the 2CO compatible server submission URL. The 2CO equivalent URL is <https://www.2checkout.com/checkout/purchase>
 - Server API URL: [initial value: empty]
This text field parameter should be populated with the 2CO compatible server API URL. The 2CO equivalent URL is <https://www.2checkout.com/api>

The 2CheckOut payment gateway setup continues with a 'Currencies accepted' framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and 'Allow currency selection at checkout:' is enabled – see **Chapter 7.3.1.4**) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]
This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.
- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]
This parameter allows you to instruct **CBSubs**™ how to handle the case of basket currency not supported by payment organization. It is a drop-down field

parameter accepting one of the following values:

- Hide this method if basket currency mismatches

This means that Gateway should not be proposed as a payment method if the currency is not supported

- Ask if user wants to convert basket currency to pay

This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that the Gateway supports. With this value selected an extra text parameter will be presented 'Confirmation text to ask user for conversion:'

- **Vendor Account Number:** [initial value: empty]

This text field parameter should be populated with your 2Checkout Vendor #. This information can be seen by visiting your 2Checkout account. The Vendor # is displayed in the top area of your main 2Checkout page once you have logged in using the VENDOR LOGIN menu item on the <http://www.2checkout.com> website. The location of the Vendor Account Number associated with 2CO is illustrated in **Figure 76**.

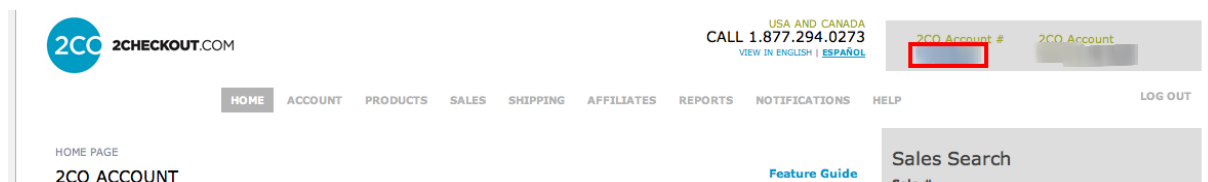


Figure 76: Finding your 2Checkout Vendor Account Number

- **Currency configured at 2Checkout:** [initial value: empty]

This dropdown select parameter should be set to the currency selected in your 2Checkout ACCOUNT → SITE MANAGEMENT Pricing Currency setting.

- **Secret word:** [initial value: empty]

This text field parameter should be populated with your 2Checkout account secret word value. The 2Checkout account secret word is configured and located on your 2CO Account tab in the 'Site Management' subcategory as

described in the 2CO knowledgebase article extract shown in **Figure 77**. The actual 'Secret Word' field parameter on the 2Checkout is illustrated in **Figure 78**.

Where do I set up the Secret Word?

December 30th, 2006, by: **knowledgebase**

To set up the secret word please log in to your 2CO account, click on the "Account" tab, then click on "Site Management" subcategory. On the "Site Management" page you will enter the Secret Word in the field provided under Direct Return. After you have entered your Secret Word click the blue "Save Changes" button at the bottom of the page.

The secret word is used by those wishing to check the MD5 hash passback, with a routine on their site. It is also needed by those using a program like the membership or download client. The secret word is also used to calculate the MD5 hash which is sent to verify the authenticity of INS posts.

The secret word should be a single or compound word or group of letters and numbers with no spaces. Examples: Monkey1mouse, 4smal3phone, gooblyWbubze.

Figure 77: How to set up 2Checkout Secret Word

2CO 2CHECKOUT.COM CALL 1.877.294.0273 USA AND CANADA
VIEW IN ENGLISH | ESPAÑOL

2CO Account # 2CO Account

HOME ACCOUNT PRODUCTS SALES SHIPPING AFFILIATES REPORTS NOTIFICATIONS HELP LOG OUT

ACCOUNT BALANCE BANK ACCOUNT **SITE MANAGEMENT** USER MANAGEMENT CONTACT INFO COMPANY INFO OWNER INFO

SITE MANAGEMENT [Feature Guide](#)

Use these settings to customize the look and feel of your checkout area. [>>More on Site Management](#)

Your changes have been successfully made.

Demo Setting

☐ On: Using this setting, all sales will be treated as demo regardless of any parameter value.

☐ Off: Using this setting, all sales will be treated as live regardless of any parameter value.

☒ Parameter: Using this setting, a demo parameter that is sent to the purchase routine will control the demo setting.

Currency

Pricing Currency: **US Dollars** [Read this first!](#)
Changes to pricing currency here will also appear on the Bank Details page.

Company Information

Company Name

URL* [URL should be that of the website that you have CBSubs installed on otherwise communication will fail](#)

Soft Descriptor

Maximum 9 Characters
This will appear on the customer's statement to help identify the charges. It is suggested that you enter something easily identifiable.

Site Title

This title will be the one that is displayed for you in our product listings.

Site Description

This is a brief description of your business and the products or services that you feature.

Site Category: **Business**

* If you wish to change your domain name, please contact the [Risk Department](#). A \$19 dollar processing fee may be assessed.

Direct Return

After completing an order, buyers should be:

☒ Given links back to my website [This setting should be set to 'Given links back to my website'](#)

☐ Direct Return (Your URL)

☐ Header Redirect (Your URL)

[>>How the Return Process Works](#)

Return URLs may be set below or in the Products area

Secret Word

[Secret word will be copied and pasted back to CBSubs gateway parameter](#)

There is a 16 character limit on the [Secret Word](#)

URLs

These can also be set at the product level in the Products Area.

Approved URL

Input a url for your customers to be sent to on a successful purchase.

[Approved URL](#) [Should be left blank](#)

Example: <https://www.yoursite.com/yourscript.php>

Affiliate URL

Input the URL provided by your affiliate program.

[Affiliate URL](#)

Example: <https://www.yoursite.com/yourscript.php>
[https://affiliate.com/sale.cgi?order=\\$a_order&total=\\$a_total&product=\\$a_product&quantity=\\$a_quantity](https://affiliate.com/sale.cgi?order=$a_order&total=$a_total&product=$a_product&quantity=$a_quantity)

[Save Changes](#) [Reset](#)

Figure 78: Site Management Parameters in 2Checkout site

- **Currency configured at 2Checkout:** [initial value: Same as global configuration]

This drop down field parameter allows you to specify the currency associated with your 2Checkout gateway. You can leave the default value to instruct CBSubs™ to use whatever currency is set as the default currency in the CBSubs™ global settings area or you can select a different currency just for your 2Checkout gateway.

- **API username:** [initial value: empty]

You need to populate this parameter with your 2Checkout API Access enabled username. If you have already created such a username account in your 2Checkout area it should appear in your ACCOUNT → USER MANAGEMENT area as indicated in **Figure 79**. If you do not have such an account, you can create one as illustrated in Figure 80.

- **API password:** [initial value: empty]

This parameter is populated with the password associated with the 2CO API Access enabled username value set in the previous field. Once again you should be able to get this information by following logic illustrated in **Figure 79** and Figure 80.

The screenshot shows the 2Checkout User Management interface. At the top, there's a navigation bar with links like HOME, ACCOUNT, PRODUCTS, SALES, SHIPPING, AFFILIATES, REPORTS, NOTIFICATIONS, HELP, and LOG OUT. Below this is a sub-navigation bar with ACCOUNT BALANCE, BANK ACCOUNT, SITE MANAGEMENT, USER MANAGEMENT (highlighted), CONTACT INFO, COMPANY INFO, and OWNER INFO. The main content area is titled 'USER MANAGEMENT' and includes a 'Feature Guide' link. It contains a table of users with columns for Username, Access, Vendor Area, Basic Editing, Financial Read Only, Financial Editing, Admin, API Access, API Updating, Date Created, and actions (Delete, Change Password). A red circle highlights the 'API Access' column for a user, and a red arrow points to the 'Create Username' button in the sidebar.

Username	Access	Vendor Area	Basic Editing	Financial Read Only	Financial Editing	Admin	API Access	API Updating	Date Created	Actions
(2 users)										
Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	2005-03-07	Delete* Change Password
--	--	--	--	--	--	--	Yes	Yes	2011-09-11	Delete Change Password

* NOTE: You may not revoke your own administrative privileges. Another administrator on your account must do that.
 ** Users cannot access both the API and Vendor Area.

Figure 79: Locating the API Access enabled user in 2CO panel

2CC 2CHECKOUT.COM

USA AND CANADA
CALL 1.877.294.0273
VIEW IN ENGLISH | ESPAÑOL

2CO Account # 2CO Account

HOME ACCOUNT PRODUCTS SALES SHIPPING AFFILIATES REPORTS NOTIFICATIONS HELP LOG OUT

ACCOUNT BALANCE BANK ACCOUNT SITE MANAGEMENT USER MANAGEMENT CONTACT INFO COMPANY INFO OWNER INFO

ADD USERNAME

To create a new user, enter the information in the form below. >>More on add username

Login Information

Email

Username

Password

Confirm Password

Security Question

Question

Answer

Access

☐ Vendor Area Access

☐ Admin

☐ Basic Editing

☐ Financial Read Only

☐ Financial Editing

☒ API Access

☐ API Updating

Create Username

Figure 80: Creating a 2Checkout user with API access privileges

- **Global Url for INS notifications to set into 2Checkout:** [calculated value]
This value is automatically calculated by **CBSubs™** for your installation and needs to be copy/pasted to your 2Checkout account. The value must be pasted to your 2CO NOTIFICATIONS → Global Settings → Global URL parameter as illustrated in **Figure 81**.

2CC 2CHECKOUT.COM

USA AND CANADA
CALL 1.877.294.0273
VIEW IN ENGLISH | ESPAÑOL

2CO Account # 2CO Account

HOME ACCOUNT PRODUCTS SALES SHIPPING AFFILIATES REPORTS NOTIFICATIONS HELP LOG OUT

SETTINGS SUCCESS FAILED TEST

INSTANT NOTIFICATION SETTINGS

Check the Enable box and add a URL to enable notifications. >>More on INS

Global Settings

Global URL

Apply

To send all messages to the same URL, enter a Global URL and click Apply

Enable All Notifications Disable All Notifications Save Settings

Figure 81: Pasting the Global URL from CBSubs to 2Checkout

Additional 2Checkout behavior related settings may be configured as follows:

- **Purchase routine:** [initial value: 'Single Page Payment Routine']

This drop down field parameter has the following options available:

- Single Page Payment Routine:
This is the default 2CO purchase routine and it supports credit card payments and intangible products/services.
- Multi-page Payment Routine
Use this setting to specify support for all payment methods (credit cards and paypal).

- **Show the order review page:** [initial value: Skip the order review page at 2Checkout]

This drop down select field parameter is used to specify if 2Checkout should show or skip showing a order review page during the payment process.

Allowable settings are:

- Skip the order review page at 2Checkout
- Show the order review page at 2Checkout

- **2Checkout user interface language:** [initial value: English]

This drop down field select parameter is used to specify which language 2Checkout interface should use during the **CBSubs™** transaction.

- **Pre populate the billing information:** [initial value: Yes, pass customer information to 2Checkout (name, address, email, ...)]

This parameter is used to specify how CBSubs™ should interface with 2Checkout regarding the billing information needed to complete the transaction. Allowable settings are:

- Yes, pass customer information to 2Checkout (name, address, email, ...)
- No, do not pass customer information to 2Checkout (customer will need to fill-in again there)

- **Pre populate the shipping information:** [initial value: No, do not pass customer address to 2Checkout (online delivery)]

This parameter is used to specify how **CBSubs™** should interface with

2Checkout regarding the shipping information needed to complete the transaction. Allowable settings are:

- No, do not pass customer address to 2Checkout (online delivery)
- Yes, pass customer address to 2Checkout (shipped items only)

- **Accept payment once:** [initial value: 2Checkout has completed its anti-fraud review (means 15-60 minutes, up to a day)]

This option allows you to specify when a payment should be considered as completed from a **CBSubs™** perspective. 2Checkout has an automated anti-fraud check that takes 15-60 minutes to complete and a manual fraud check that takes 24 hours to complete. Credit card capture and deposit usually takes 1-3 days. Credit card authorization is immediate, so you may not want to wait for fraud review in some cases. Allowable settings are:

- 2Checkout has completed its anti-fraud review (means 15-60 minutes, up to a day)

This setting instructs **CBSubs™** to wait for 2Checkout anti-fraud review in order to consider payment process completed (and unlock website privileges).

- Credit-card is authorized but do not wait for fraud check result (means immediately)

Use this setting to instruct **CBSubs™** to consider payment as completed when credit-card authorization takes place and not to wait for fraud check. This will result in virtually immediate **CBSubs™** plan subscription activation but does of course carry a certain fraud risk (that might reverse payment later on).

- Payment is deposited in your 2Checkout account (means 1-3 days usually)

This setting will instruct **CBSubs™** to wait for 2Checkout to notify it that the actual payment amount has been deposited to your 2Checkout account balance. It can usually take 1 to 3 days to complete.

- **Single Payment Button:** [initial value: )

Select the appropriate 2CO payment button that **CBSubs™** should use on its

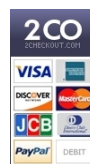


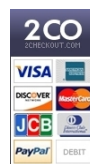
pages. Available 2CO payment button icons are shown in **Figure 82**. This setting can be over-ridden by the next parameter.

- **Custom Button Text or Image:** [initial value: empty]
Enter text of button or URL of custom image (jpg, gif or bmp) to use for payment button. This setting will over-ride the previous parameter setting.
- **Alternate text:** [initial value: empty]
This is the alternate text to be used by **CBSubs™** with the Custom Button Text or Image setting for accessibility purposes.



Figure 82: 2CO available payment buttons



- **Autorecurring Payment Button:** [initial value: ]
Select the appropriate 2CO payment button that **CBSubs™** should use on its pages when auto-recurring payment is needed. Available 2CO payment button icons are shown in **Figure 83**. This setting can be over-ridden by the next parameter.

- **Custom Button Text or Image:** [initial value: empty]
Enter text of button or URL of custom image (jpg, gif or bmp) to use for payment button. This setting will over-ride the previous parameter setting.
- **Alternate text:** [initial value: empty]
This is the alternate text to be used by **CBSubs™** with the Custom Button Text or Image setting for accessibility purposes.



Figure 83: 2CO available auto-recurring payment buttons

- **Additional title and alternate text for the button):** [initial value: 2Checkout.com is an authorized retailer for %s]
This text field is needed to meet credit card rules as it is required to display a message similar to: 2Checkout.com is an authorized retailer for business_name. The %s is substituted by your website title.
- **CSS class (e.g. 'cbreg_green cbreg_admin_green'):** [initial value: empty]
This text field parameter allows you to specify the format (expressed via a specific CSS class) that will be used when presenting gateway payments.

There are two types of CSS classes predefined: the frontend class and the backend class (this has the `_admin_` part in its name). Predefined classes that may be used include:

- `cbreg_green cbreg_admin_green`
 - `cbreg_red cbreg_admin_red`
 - `cbreg_orange cbreg_admin_orange`
 - `cbreg_blue cbreg_admin_blue`
 - `cbreg_cyan cbreg_admin_cyan`
 - `cbreg_yellow cbreg_admin_yellow`
 - `cbreg_magenta cbreg_admin_magenta`
- **Owner Id (only supported: 0 for now):** [initial value: 0]
This is the owner of current gateway account value. At present only 0 value (system) is supported.
- **Notification host (leave blank):** [initial value: empty]
This setting is typically left blank (empty). It is used only if your hosting (dedicated server) is running on a clustered environment and the payment gateway notification (IPN) needs to go to a different from the website domain name. In this case the additional domain name should be entered here in the form of `http://youripndomain.com`.
- **Company Info from 2Checkout using API:**
This area will return information from the 2Checkout organization. If you have not properly specified the API username and password in previous settings you might see some message like the one illustrated in **Figure 84**.

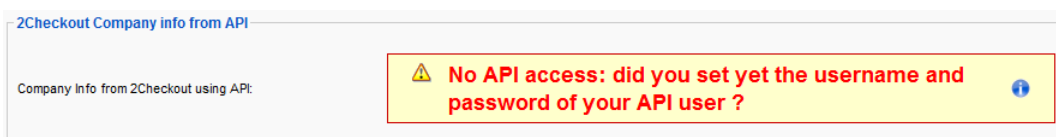


Figure 84: 2CO No API access message

This concludes the **CBSubs™** 2Checkout gateway setup process. If you have any questions or issues regarding your 2Checkout account or configurations from the

2Checkout side, please use the 2Checkout available online resources located at <http://www.2checkout.com/community/help> .

The following checklist of items can help you with your 2Checkout configuration:

1. On Account → Site Management Tab (see **Figure 78**):
 - a. Make sure Demo Setting is set to Parameter
 - b. Make sure the URL* parameter shows your website URL (where you have **CBSubs™** installed). If it does not then you need to contact the 2CO helpdesk to have it changed.
 - c. Configure your Secret Word parameter (you will need to copy it back to your **CBSubs™** 2CO gateway).
 - d. Approved URL should be kept to blank.

2. On Notifications → Settings Tab:

Make sure that you copy over the **CBSubs™** URL (generated in the **CBSubs™** gateway area) to all the URL fields on this page. Just paste it once in the first parameter and click enable all notifications as illustrated in **Figure 81**.

7.4.3.1 Configuring 2CheckOut auto-recurring Products

The 2CheckOut organization has a built-in community of product resellers which you can take advantage of if it makes sense for your business. In order to do this you need to create products in your 2CheckOut user interface to match your CBSubs plan offerings. You can create products from your 2CO → PRODUCTS → CREATE menu after logging in to your 2CO account. You also **must** create 2CheckOut products if you want to have auto-recurring charges.

In **Figure 85** we have created a product for an auto-recurring offering.

The screenshot shows the 'CREATE PRODUCT' interface in the 2CheckOut system. The top navigation bar includes links for HOME, ACCOUNT, PRODUCTS (highlighted with a red box), SALES, SHIPPING, AFFILIATES, REPORTS, and NOTIFICATIONS. Below this is a secondary bar with VIEW, EDIT, CREATE (highlighted with a red box), UPLOAD, IMAGES, OPTIONS, and COUPONS. The main section is titled 'CREATE PRODUCT' with a 'Feature Guide' link. It provides instructions: 'To Create a product, type the information requested in the following sections. >>More on create products'. The form fields are as follows:

Name	My 2CO test auto-recurring product #1	Product Name
Your product ID	my2coprodid	Your product ID
Short Description	This is a short description for my auto-recurring product #1	Product Description
Long Description	This is a short description for my auto-recurring product #1	Product Long Description
Price	10	Product Price
Tangible	<input type="radio"/> Yes <input checked="" type="radio"/> No	Product Tangible
Recurring	<input checked="" type="radio"/> Yes <input type="radio"/> No	Product Recurrence
Startup Fee		Product Startup Fee
Bill Every	1 Month(s)	Product Recurrence
Continue Billing For	Forever	Product Duration

Figure 85: Creating a 2CheckOut Recurring Product

After saving our newly created 2CheckOut product we can see its 2CO ID generated in the PRODUCTS → VIEW summary page as illustrated in **Figure 86**. This 2CO ID should be noted as the 2CO ID of our 2CheckOut product.

HOME ACCOUNT PRODUCTS SALES SHIPPING AFFILIATES REPORTS NOTIFI					
VIEW EDIT CREATE UPLOAD IMAGES OPTIONS COUPONS					
LIST PRODUCTS					Fea
This is a list of existing products. Select advanced mode to choose fields to update. >>More on edit products					
Displaying Results 1 - 8 of 8 < - 1 - > Page 1 of 1					Results Per Page
Delete	Actions	Images	2CO ID	Product Id	Name
			1	test_recurring_prod_1	Recurring product 2 times 1€ at 1 week interval
			2	2	CB Doc subscription
			3	5	CBSubs 500 users 1 site 1 year maintenance
			4	5000	CBSubs 5000 users 1 site 1 year maintenance
			5	4	MyCommunity template 1 site license
			6	4000	MyCommunity template all your own sites license
			7	9999	CBSubs unlimited users 1 site 1 year maintenance
			8	my2coprodid	My 2CO test auto-recurring product #1

Figure 86: 2CO Product ID for use in CBSubs plan

If we again edit our 2CheckOut product we will see the system product id in the URL of our browser as illustrated in **Figure 87**. In this case the id is 4470169440.

Figure 87: Locating the 2CO system id for your product

This is the system id that should be used when configuring our **CBSubs™** plans with their relevant 2CO product (see next section).

7.4.3.2 Configuring auto-recurring plans for 2CheckOut gateway

After creating a **CBSubs™** 2CheckOut gateway, your plans will show an extra 2CheckOut sub-tab in their 'integrations' tab as illustrated in **Figure 88**.

The screenshot shows the 'Integrations' tab in the CBSubs system. The 'Integrations settings (if integrating plugins are loaded):' section is active, with the '2Checkout' sub-tab selected. Below this, the '2Checkout Payment gateway optional params' section is visible. It includes a dropdown menu for 'twocheckout_gateway' set to 'My2CO'. There are two main sections: 'Single payment' and 'Auto-recurring payments'. Each section contains two input fields: 'Existing Assigned Product Id (2CO-ID number) at 2Checkout.com:' and 'Existing Product system product id (number) at 2Checkout.com:'. Information icons (i) are present next to each input field.

Figure 88: Configuring CBSubs plan for 2CO auto-recurring payments

Note: If you do not see a 2Checkout Integration tab in your CBSubs plan area then you most likely have not installed and pulished the 2Checout plugin as instructed in **Chapter 6.23**.

When dealing with single payment products (not auto-recurring) there is no immediate need to configure this tab. You might however want to create 2CheckOut products to reflect your **CBSubs™** offerings. This is done to take advantage of the large reseller community built into the 2CheckOut organization. If so you need to populate both parameters of the 'Single payment' frame displayed in **Figure 88**. The first parameter is the 2CO-ID of the 2CheckOut product (8 for the product created in **Figure 86**) and the second one is the 2CO system id that is shown when editing the product in the generated URL address (4470169440 for the product created in **Figure 87**). Both items refer to the same 2CO product creation and both are needed (if you chose to take advantage of the 2CO reseller process).

7.4.4 Creating and Configuring a Swiss PostFinance Gateway

The Swiss PostFinance (www.postfinance.ch) gateway is a payment organization handling online payments in Switzerland.

CB Paid Subscriptions: New Payment gateway settings

Payment gateway settings

Type of payment gateway: Swiss PostFinance

Name of gateway account:

Ordering: 2 last

Swiss PostFinance E-Payments

Enable Swiss PostFinance E-Payments: No

Swiss PostFinance server: Normal Swiss PostFinance server

Name of payment provider to show to your customers: Swiss PostFinance

Swiss PostFinance Shop id (PSPD):

Swiss PostFinance SHA Pass phrase (SHA-IN):

Swiss PostFinance SHA (SHA-IN) Hash algorithm: SHA-1

Swiss PostFinance SHA Pass phrase (SHA-OUT):

URL to set into Swiss PostFinance "Direct HTTP server-to-server request" and "HTTP request for status changes":

First fill-in parameters above, then "Apply" this new gateway settings: Then this URL id will be computed and displayed.

Payment type: Immediate sale

Swiss PostFinance user interface language: English

Accept payment once: Payment is authorized and captured (means completed)

Anti-Fraud helping hidden fields

If the invoicing address corresponds to credit card invoicing address, sending these in hidden fields to Swiss PostFinance might help for anti-fraud:

Send short description line of purchase: Yes

Send customers email address: Yes

Send customers invoicing address: Yes

Alias Manager Option

The "Alias Manager" feature allows to store safely the Credit Card at the payment server and to reference it in future payments. If you have subscribed to the "Alias Manager" feature at Swiss PostFinance, you can activate and configure it here:

Enable Alias Manager feature: Disabled

Presentation on this site

Selection of payment method: all methods available at the payment service provider

Payment Button:

Custom Button Text or Image:

Button hover (title) text: Pay safely with 'sa

General settings

CSS class (e.g. 'cbreg_green cbreg_admin_green'):

Owner id (only supported: 0 for now): 0

Presentation at the Payment Service Provider

This is for the styling of the static payment page at the Payment Service Provider:

Payment template type: Standard static payment template

Title text:

https URL or filename of the logo to display at the top left:

Static payment page colors and text font

Background color:

Text color:

Table background color:

Table text color:

Button background color:

Button text color:

Font Family:

Phone-specific static default layout on iPhones: Yes

3D Secure presentation

Where to display the 3-D Secure window:

3-D Secure identification page display: Default

CBSubs™ paid subscriptions Community Builder/™ plugin is commercially licensed software, Copyright © 2007-2010 and Trademark of Lightning MultiCom SA, Switzerland and its licensors. Disclaimer: This software comes "as is" with no guarantee for accuracy, function or fitness for any purpose. All recorded items should be double-checked against payment organization transactions.

Figure 89: Swiss PostFinance Gateway Setup

The Swiss PostFinance organization specifics can be found at the following URLs:

- <https://www.postfinance.ch/pf/content/en/seg/biz/product/eserv/epay.html>
- <https://www.postfinance.ch/pf/content/en/seg/biz/product/eserv/epay/providing/news.html>
- <https://www.postfinance.ch/pf/content/en/seg/biz/product/eserv/epay/seller/off.html>

In order to setup such an account you would need to personally contact via phone the Swiss organization and they will guide you through the process.

Once you click on the **New** button or the **Create New** link shown in **Figure 62**, you will be presented with a drop-down selection mechanism soliciting the payment gateway type (see **Figure 63**). Once you select '*Swiss PostFinance*' from the drop-down list of available gateway types, you will be confronted with additional payment gateway parameters tailored to the Swiss PostFinance gateway type case. You will be prompted to complete the following parameters:

- **Type of payment gateway:** [fixed value: Swiss PostFinance]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value '*Swiss PostFinance*' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like '*My Swiss PostFinance Gateway*'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our Swiss PostFinance Gateway setup screen displays a framed area with the following parameters:

- **Enable Swiss PostFinance E-Payments:** [initial value: No]
This Yes/No drop-down parameter permits us to specify the mode of operation our 'Swiss PostFinance' gateway should operate under.
 - No (default)
By default our new 'Swiss PostFinance' gateway is not enabled – thus is off. If this setting is specified the gateway will not be presented as an option.
 - Yes
Use this setting to enable single billing payments (no auto-recurring currently supported).
-
- **Swiss PostFinance Server:** [initial value: Normal Swiss PostFinance server]
This parameter is populated via a drop-down mechanism permitting the following 3 options:
 - Normal Swiss PostFinance server
Use this option to configure your gateway for 'live' normal mode operations.
 - Test server
Use this option to configure your gateway to work with in demo mode. This setting should be used just for testing purposes in order to test the **Swiss PostFinance ↔ CBSubs™** workflows without incurring real payment costs.
 - Other server compatible with Swiss PostFinance
This mode is used to configure other gateway organizations that have emulated/copied the Swiss PostFinance model. When you select this option you will be presented with one additional field:
 - Server submission URL: [initial value: empty]
This text field parameter should be populated with the Swiss PostFinance compatible server submission URL. The Swiss PostFinance equivalent URL is:
<https://e-payment.postfinance.ch/ncol/prod/orderstandard.asp>
-

- **Name of payment provider to show your customers:** [initial value: Swiss PostFinance]

This is the name of payment provider to show your customers in title of payment button and in other feedbacks.

- **Swiss PostFinance Shopid (PSPID):** [initial value: empty]

Your Swiss PostFinance shopid (case sensitive) should be populated in this field. You will be provided with this id when you complete the Swiss PostFinance account setup process.

- **Swiss PostFinance SHA Pass phrase (SHA-IN):** [initial value: empty]

This text field should be populated with your SHA Pass phrase as located in your Swiss PostFinance account → Technical information → Data and origin verification tab as illustrated in **Figure 90**. Please notice that there are actually 2 SHA-IN Pass phrase fields on this Swiss PostFinance page. The **CBSubs™** ↔ Swiss PostFinance integration currently supports the e-Commerce mode and not the PostFinance Directlink and PostFinance Batch (Automatic) mode. So you would need to populate the first field on this Swiss PostFinance tab and copy / paste it into the **CBSubs™** parameter field. Just click on the **Visible** button as illustrated in **Figure 90** to see the SHA-IN Pass phrase (converts '****' to real characters).

The screenshot shows the PostFinance configuration interface. The left sidebar contains a menu with options like 'Logoff /logon', 'Configuration', 'Advanced', 'Operations', and 'Explanation of your menu'. The 'Configuration' section is expanded, showing 'Global transaction parameters', 'Global security parameters', 'Payment Page layout', 'Data and origin verification' (highlighted with a red box), 'Transaction feedback', 'Transaction e-mails', and 'Test Info'. The 'Data and origin verification' tab is active, displaying 'Checks for e-Commerce' and 'Checks for PostFinance e-Terminal and PostFinance Batch (Manual)'. The 'SHA-IN Pass phrase' field is highlighted with a red box, and the 'Visible' button next to it is also highlighted with a red box. The 'Visible' button is used to toggle the visibility of the SHA-IN Pass phrase.

Figure 90: PostFinance SHA-IN Pass phrase

- **Swiss PostFinance SHA (SHA-IN) Hash algorithm:** [initial value: SHA-1]

This drop-down parameter is used to select the hashing algorithm used. You should match this value with the one specified in your Swiss PostFinance account → Technical information → Global security parameters tab as illustrated in **Figure 91**.

The screenshot displays the PostFinance user interface for configuring global security parameters. The top navigation bar includes tabs for 'Global transaction parameters', 'Global security parameters' (which is active and highlighted with a red box), 'Payment Page layout', 'Data and origin verification', 'Transaction feedback', 'Transaction e-mails', and 'Test Info'. The left sidebar contains a 'Configuration' menu with options like 'Password', 'Account', 'Payment methods', 'Users', 'Support', 'Alias', 'Technical information' (highlighted with a red box), 'Advanced', and 'Operations'. The main content area is titled 'Hashing method' and includes a description: 'This configuration affects all signature checks of which the pass phrases are configured under "Data and origin verification" and "Transaction feedback".' Below this, there are two sections: 'Compose the string to be hashed by concatenating the value of:' with radio buttons for 'Main parameters only.' and 'Each parameter followed by the pass phrase.' (selected), and 'Hash algorithm:' with radio buttons for 'SHA-1' (selected), 'SHA-256', and 'SHA-512'. The 'SHA-1' option is highlighted with a red box. At the bottom, there are three buttons: 'Go back to "Global transaction parameters"', 'Confirm and go back to "Homepage"', and 'Confirm and go to "Payment Page layout"'. A large 'TEST' watermark is visible across the center of the page.

Figure 91: PostFinance Hash Algorithm Setting

- **Swiss PostFinance SHA Pass phrase (SHA-OUT):** [initial value: empty]

This text parameter should be populated with the Pass phrase specified in your Swiss PostFinance account → drop-down parameter is used to select the hashing algorithm used. You should match this value with the one specified in your Swiss PostFinance account → Technical information → Transaction Feedback tab as illustrated in **Figure 92** and **Figure 93**.

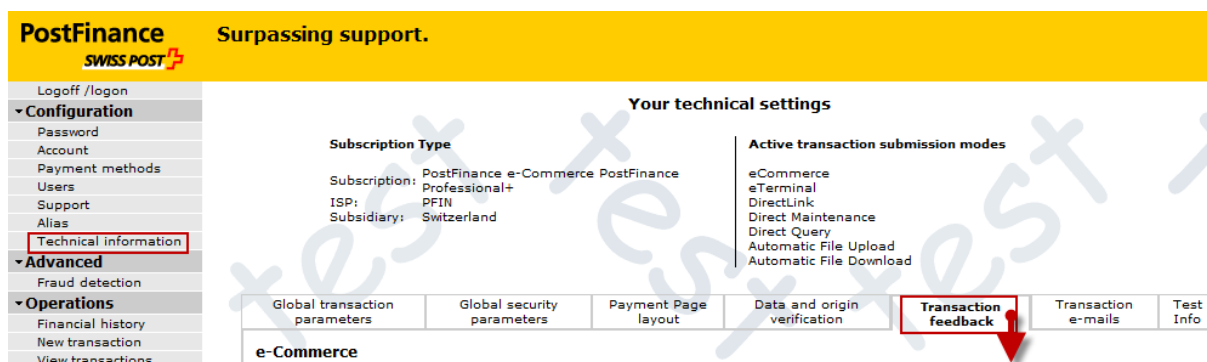


Figure 92: PostFinance Technical Information Transaction feedback tab

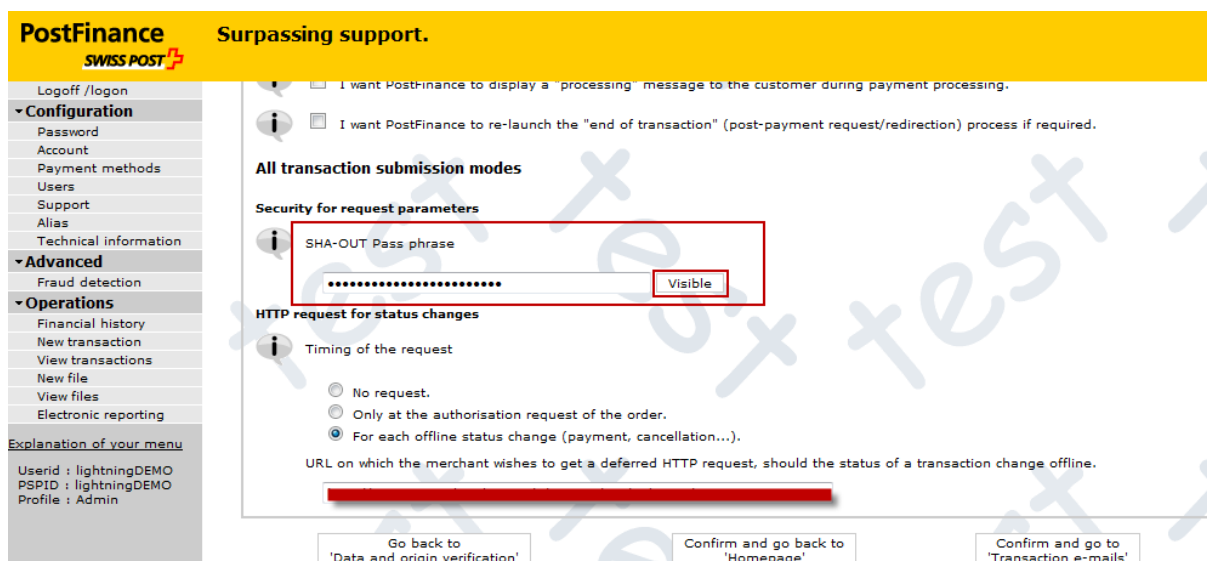


Figure 93: PostFinance SHA-OUT Pass phrase

- **URL to set into Swiss PostFinance admin area in Technical Information - Transaction feedback tab - "Direct HTTP server-to-server request" and "HTTP request for status changes" - "URL on which the merchant wishes to get a deferred HTTP request, should the status of a transaction change offline":** [initial value: calculated]

This area will generate a URL (once the previous parameters are populated and the Save or Apply button is pressed) that should be copied and pasted in various Swiss PostFinance parameter areas. These areas are the Swiss PostFinance account → Technical information → Transaction Feedback tab as illustrated in Figure 94 and **Figure 95**.

Direct HTTP server-to-server request

Timing of the request

☐ No request.
☒ Always deferred (not immediately after the payment).
☐ Always online (immediately after the payment to allow customisation of the response seen by the customer).
☐ Online but switch to a deferred request in intervals when the online requests fail.

URL of the merchant's post-payment page:

If the payment's status is "accepted", "on hold" or "uncertain".

`ask=pluginclass&plugin=cbpaidsubscriptions&cbpgaccto=14&result=notify`

If the payment's status is "cancelled by the client" or "too many rejections by the acquirer".

`ask=pluginclass&plugin=cbpaidsubscriptions&cbpgaccto=14&result=notify`

Request method

☐ POST
☒ GET

Figure 94: Swiss Post Direct HTTP server-to-server request URL fields

All transaction submission modes

Security for request parameters

SHA-OUT Pass phrase

..... Visible

HTTP request for status changes

Timing of the request

☐ No request.
☐ Only at the authorisation request of the order.
☒ For each offline status change (payment, cancellation...).

URL on which the merchant wishes to get a deferred HTTP request, should the status of a transaction change offline.

`http://localhost/development/index.php?option=com_comprofiler&task=pl`

Go back to 'Data and origin verification' Confirm and go back to 'Homepage' Confirm and go to 'Transaction e-mails'

Figure 95: Swiss PostFinance HTTP request for status changes URL field

You will also notice as illustrated in Figure 94 that the Swiss PostFinance Direct HTTP server to server request method setting can be set to either 'GET' or 'POST'. **CBSubs™** will work fine with either setting but 'POST' is the recommended setting here for security reasons. The 'GET' setting is easier for debugging since GET parameters go into webserver logs, but 'POST' setting is more secure and also produces smaller URLs.

- **Payment type:** [initial value: Immediate sale]

This drop-down parameter field is used to specify how payments should be handled by the gateway and **CBSubs™**. There are two applicable values:

- Immediate sale
This setting instructs **CBSubs™**/Swiss PostFinance to process sale at once and without delay.
- Only reservation. Deferred sale.
This setting is used to reserve/authorize payment that must be manually finalized or rejected in Swiss PostFinance backend.
- **Swiss PostFinance user interface language:** [initial value: English]
This drop-down parameter field is used to specify what language should be used by the Swiss PostFinance website during the payment workflow with **CBSubs™**. At present there is no multi-language support and the available languages are: English, Deutsch, Francais, Italiano, Danish, Dutch, Flemish, Japanese, Norwegian, Polish, Portugese, Spanish, Swedish, Turkish.
- **Accept payment once:** [initial value: payment is authorized and captured (means completed)]
This drop-down parameter is used to specify when **CBSubs™** should consider payment as completed. There are three applicable values:
 - Payment is authorized and captured (means completed)
This setting instructs **CBSubs™** to wait for the Swiss PostFinance process to authorize and capture the payment.
 - Even if payment is pending authorization, authorized or captured
This setting is used to instruct **CBSubs™** to consider the process as completed even before the Swiss PostFinance end has authorized or captured the payment amount.
 - Payment is authorized but not necessarily captured
This setting instructs **CBSubs™** to consider the process as completed (and activate the plan subscription) once the Swiss PostFinance process indicates that the payment has been authorized (and even before the payment is captured / secured).

The next three payment gateway parameters deal with anti-fraud functionality that exists in the Swiss PostFinance organization. If the invoicing address corresponds to

credit card invoicing address, sending these in hidden fields to Swiss PostFinance might help for anti-fraud:

- **Send short description line of purchase:** [initial value: Yes]
This Yes/No drop-down parameter is used to instruct **CBSubs™** to send or not send a hidden field to the Swiss PostFinance website containing a short description of the purchase.
- **Send customers email address:** [initial value: Yes]
This Yes/No drop-down parameter is used to instruct **CBSubs™** to send or not send a hidden field to the Swiss PostFinance website containing the customers email address.
- **Send customers invoicing address:** [initial value: Yes]
This Yes/No drop-down parameter is used to instruct **CBSubs™** to send or not send a hidden field to the Swiss PostFinance website containing the customers invoicing address
- **Send customers phone number:** [initial value: Yes]
This Yes/No drop-down parameter is used to instruct **CBSubs™** to send or not send a hidden field to the Swiss PostFinance website containing the customers phone number

The next parameter is related to the Alias Manager Option. The "Alias Manager" feature of the Swiss PostFinance organization allows storing safely the Credit Card at the payment server and to reference it in future payments. If you have subscribed to the "Alias Manager" feature at Swiss PostFinance, you can activate and configure it here:

- **Enable Alias Manager feature:** [initial value: Disabled]
This drop-down parameter is used to instruct **CBSubs™** how it should interface with the Swiss PostFinance Alias Manager feature. It can be configured with one of the following values:

- Disabled
This setting basically disables the feature.
- Enable only for recurring payments (not auto-recurring, but you can trigger payments from e-Terminal)
This setting has the Alias Manager enabled only for recurring payments. There is no auto-recurring operational at this time, but you can manually trigger payments from the e-Terminal area of your Swiss PostFinance panel.
- Enabled for all payments
This setting has the Alias Manager enabled for all payments.

If this setting is enabled (using one of the last two drop-down options), then the following three additional fields will appear:

- **Text explaining to customer the reason for asking to store the financial coordinates:** [initial value: empty]
This text parameter should be populated with the message that should be displayed to customer when the process asks for permission to store the financial information of the customer (credit card number, etc.) for future use.
- **Text shown to customer about the restored hidden financial information:** [initial value: empty]
This text parameter should be populated with the message that should be displayed to customer when restoring the financial information that has previously be saved.
- **Alias name determined by:** [initial value: By Payment Service Provider]
This drop-down parameter is used to instruct **CBSubs™/ Swiss PostFinance** how to determine the alias name to be used to reference the financial information that is stored in the Swiss PostFinance system.

The next framed area is the 'DirectLink Option' frame that contains the following parameters:

- **Enable DirectLink feature:** [initial value: Disable]

This drop-down parameter is used to instruct **CBSubs™/ Swiss PostFinance** if the DirectLink feature should be enabled or not. If this parameter is set to 'Enabled for auto-recurring', then additional parameters will appear:

- **Current IP address of this server:** [initial value: calculated]
- **Swiss PostFinance DirectLink and Ogone Batch (Automatic) SHA-IN Pass phrase (See 'i'):** [initial value: empty]

Please read tooltip on your **CBSubs™** payment gateway page for up to date information about this setting.

- **Swiss PostFinance DirectLink API username:** [initial value: empty]

Please read tooltip on your **CBSubs™** payment gateway page for up to date information about this setting.

- **Swiss PostFinance DirectLink API user password:** [initial value:]

Please read tooltip on your **CBSubs™** payment gateway page for up to date information about this setting.

The PostFinance payment gateway setup continues with a 'Currencies accepted' framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and 'Allow currency selection at checkout:' is enabled – see **Chapter 7.3.1.4**) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]

This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.

- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]

This parameter allows you to instruct **CBSubs™** how to handle the case of basket currency not supported by payment organization. It is a drop-down field

parameter accepting one of the following values:

- Hide this method if basket currency mismatches
This means that Gateway should not be proposed as a payment method if the currency is not supported
- Ask if user wants to convert basket currency to pay
This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that the Gateway supports. With this value selected an extra text parameter will be presented 'Confirmation text to ask user for conversion:'

The next parameter section is related to site presentation aspects of the payment gateway interaction between **CBSubs™** and Swiss PostFinance. This parameter section is illustrated in **Figure 96**.

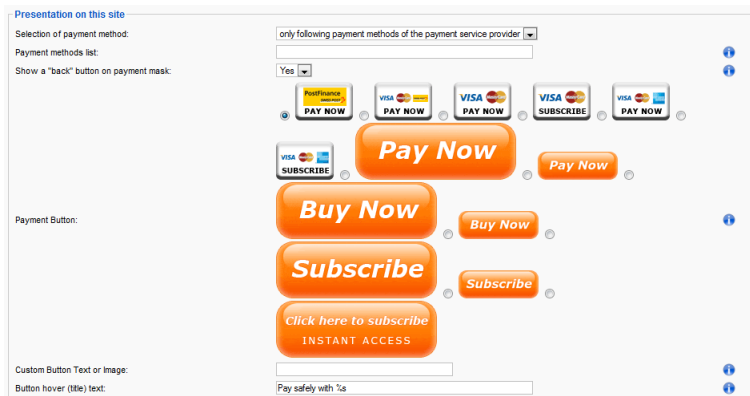


Figure 96: Swiss PostFinance Presentation on this site parameters

- **Selection of payment method:** [initial value: All methods available at the payment service provider]
This drop-down parameter is used to instruct **CBSubs™** / **Swiss PostFinance** about what payment methods are to be used/presented to the user during the payment process. The following 2 values are possible:
 - 'All methods available at the payment service provider'.
This setting instructs **CBSubs™** to present all payment methods

supported by the Swiss PostFinance payment organization to **CBSubs™** plan purchasers during the checkout process.

- 'only following payment methods of payment service providers'

This setting will automatically show two additional fields that will permit us to specify exactly which payment methods and extra functionality we would like to present to purchaser during checkout process.

- **Payment methods list:** [initial value: empty]

This text parameter should be populated with a comma separated list of payment methods that should be presented. Available payment methods should be verified from the Swiss PostFinance website. The following methods are currently supported: CreditCard, PostFinance Card, PostFinance e-finance, PAYPAL, UNEUROCOM, CBS Online, CENTEA Online, Dexia Direct Net, eDankort, EPS, giropay, IDEAL, ING Homepay, KBC Online, MPASS, paysafecard, Direct Debits AT, Direct Debits DE, Direct Debits NL, Acceptgiro, Bank transfer, Payment on delivery, InterSolve, MiniTix, PingPing, TUNZ, Wallie.

- **Show “back” button on payment mask:** [initial value: empty]

This Yes/No drop-down select parameter only appears if the 'only following payment methods of payment service providers' was previously specified and it is used to specify if a “back” button is to appear on the payment form allowing the purchaser to change the selected payment method.

- **Payment button:** [initial value: first radio field selected]

This radio button parameter is used to select the payment button that should be used for the Swiss PostFinance payment gateway. As you can see from **Figure 96** there are many available button icons and if there is nothing in the list that appeals to you, the next parameter can be used to manually specify a text or icon button.

- **Custom text or image:** [initial value: empty]

Use this text parameter to specify the custom text that should appear as a payment button or enter the URL of a custom image (gif, jpg or bmp) that

should be used as a payment button.

- **Button hover (title) text:** [initial value: Pay safely with %s]

This text parameter is used to specify the hover popup and title text of the payment button. The %s value in the string will be substituted with the name of the payment method chosen.

After the 'Presentation on this site' set of parameters we will be asked to populate the 'General settings' parameter set.

- **CSS class (e.g. 'cbreg_green cbreg_admin_green'):** [initial value: empty]

This text field parameter allows you to specify the format (expressed via a specific CSS class) that will be used when presenting gateway payments.

There are two types of CSS classes predefined: the frontend class and the backend class (this has the _admin_ part in its name). Predefined classes that may be used include:

- cbreg_green cbreg_admin_green
- cbreg_red cbreg_admin_red
- cbreg_orange cbreg_admin_orange
- cbreg_blue cbreg_admin_blue
- cbreg_cyan cbreg_admin_cyan
- cbreg_yellow cbreg_admin_yellow
- cbreg_magenta cbreg_admin_magenta

- **Owner Id (only supported: 0 for now):** [initial value: 0]

This is the owner of current gateway account value. At present only 0 value (system) is supported.

The next gateway parameter set deals with the Presentation at the Payment Service Provider related settings. There are basically two (2) field sets that will appear in this area depending on the value selected for the first parameter setting 'Payment template type'.

- **Payment template type:** [initial value: Standard static payment template]

This drop-down field parameter accepts one of two values:

- 'Standard static payment template'

This setting is the default static template setting supported by the Swiss PostFinance organization. Once selected the remaining parameter fields in the 'Presentation at the Payment Service Provider' set will appear as illustrated in **Figure 97**.

The screenshot shows a web form titled "Presentation at the Payment Service Provider". Below the title is a subtitle: "This is for the styling of the static payment page at the Payment Service Provider:". The form contains several sections:

- Payment template type:** A dropdown menu with "Standard static payment template" selected.
- Title text:** A text input field.
- https:URL or filename of the logo to display at the top left:** A text input field.
- Static payment page colors and text font:** A section with multiple color and font selection fields:
 - Background color:
 - Text color:
 - Table background color:
 - Table text color:
 - Button background color:
 - Button text color:
 - Font Family:
- iPhone-specific static default layout on iPhones:** A dropdown menu with "Yes" selected.
- 3D Secure presentation:** A section with two fields:
 - Where to display the 3-D Secure window:** A dropdown menu.
 - 3-D Secure identification page display:** A dropdown menu with "Default (in the main window)" selected.

Figure 97: Presentation at the Payment Service Provider - Standard static payment template

- 'Dynamic payment template from your site'

This setting should be used only after contacting the Swiss PostFinance organization and studying their advanced documentation. Once selected the remaining parameter fields in the 'Presentation at the Payment Service Provider' set will appear as illustrated in **Figure 98**.

Presentation at the Payment Service Provider

This is for the styling of the static payment page at the Payment Service Provider:

Payment template type: Dynamic payment template from your site payment_template_type
You need to contact Swiss PostFinance and study their advanced documentation if you want to change this from static to dynamic.

Dynamic payment page

This page is fetched from your site by the payment server and displayed in https, so all its references must be https://

URL of your html template page:

Title text:

https:URL or filename of the logo to display at the top left:

iPhone-specific static default layout on iPhones: Yes

3D Secure presentation

Where to display the 3-D Secure window:

3-D Secure identification page display: Default (in the main window)

Figure 98: Presentation at the Payment Service Provider - Dynamic payment template

If the 'Standard static payment template' value is specified for the Payment template type parameter, then the following field parameters are requested:

- **Title text:** [initial value: empty]
The text placed in this parameter will be used as the title on the static payment page presented by the Swiss PostFinance website during the payment process. For example, if we set this value to 'My page title' we would see it appearing in our browser and also in the actual page content as illustrated in **Figure 100**.
- **https:URL or filename of the logo to display at the top left:** [initial value: empty]
This is the URL or the filename (if you have stored your logo on the Swiss PostFinance site) of the logo you want displayed on the Swiss PostFinance payment page next to the title (see previous parameter). The logo needs to be stored on a secure server (https://). If you do not have a secure environment to store your logo you can use the Swiss PostFinance organization to activate the 'Logo Hosting' option on your account.

The next parameter fields deal with the 'Static payment page colors and text fonts'.

- **Background color:** [initial value: empty/white]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'white' will be used.

- **Text color:** [initial value: empty/black]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'black' will be used.
- **Table background color:** [initial value: empty/white]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'white' will be used.
- **Table text color:** [initial value: empty/black]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'black' will be used.
- **Button background color:** [initial value: empty/white]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'white' will be used.
- **Button text color:** [initial value: empty/black]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'black' will be used.
- **Font family:** [initial value: empty/Verdana]
This is the font family (e.g., arial, verdana, times, etc) that is to be used on the payment page generated by the Swiss PostFinance website.
- **iPhone specific static default layouts on iPhones:** [initial value: Yes]
Presents an iPhone specific layout making payments easier on iPhones and iPads.
- **3D secure identification page display:** [initial value: Default (in the main window)]
This drop-down field parameter specifies how the 3D secure identification page should be displayed by the Swiss PostFinance website during the payment process and can be set to one of the following values:
 - 'Default (in the main window)'

- 'in the main window (recommended by VISA/MasterCard)'
- 'in a POPUP window and return to main window at the end'

If the 'Dynamic payment template from your site' setting was specified for the Payment template type parameter, then the following field parameter will be displayed.

- **URL of your html template page:** [initial value: empty]

This text field parameter is used to specify the http or https URL of your template page with “\$\$\$PAYMENT_ZONE\$\$\$” in it. The URL must be absolute (contain the full path), it cannot be relative. Only standard ports 80 and 443 are supported. If the URL is to a Joomla page, then it should be https. If URL is http then all internal links on this page must be https because the page will be proxied by the Swiss PostFinance process to https. You can study more about templating in the Swiss PostFinance webpage and the relevant documentation:

https://e-payment.postfinance.ch/ncol/PostFinance_e-Com-ADV_EN.pdf

In **Figure 99** we have illustrated what the PostFinance PAY NOW button will look like in the **CBSubs™** payment page (the first 2 icons are from a Dummy Gateway).



Figure 99: PostFinance button in CBSubs payment process

If the PostFinance button is selected in the payment workflow on **Figure 99**, then **CBSubs™** will redirect the user to the Swiss PostFinance page as illustrated in **Figure 100**. As you can see in this figure there are many payment methods available for selection.

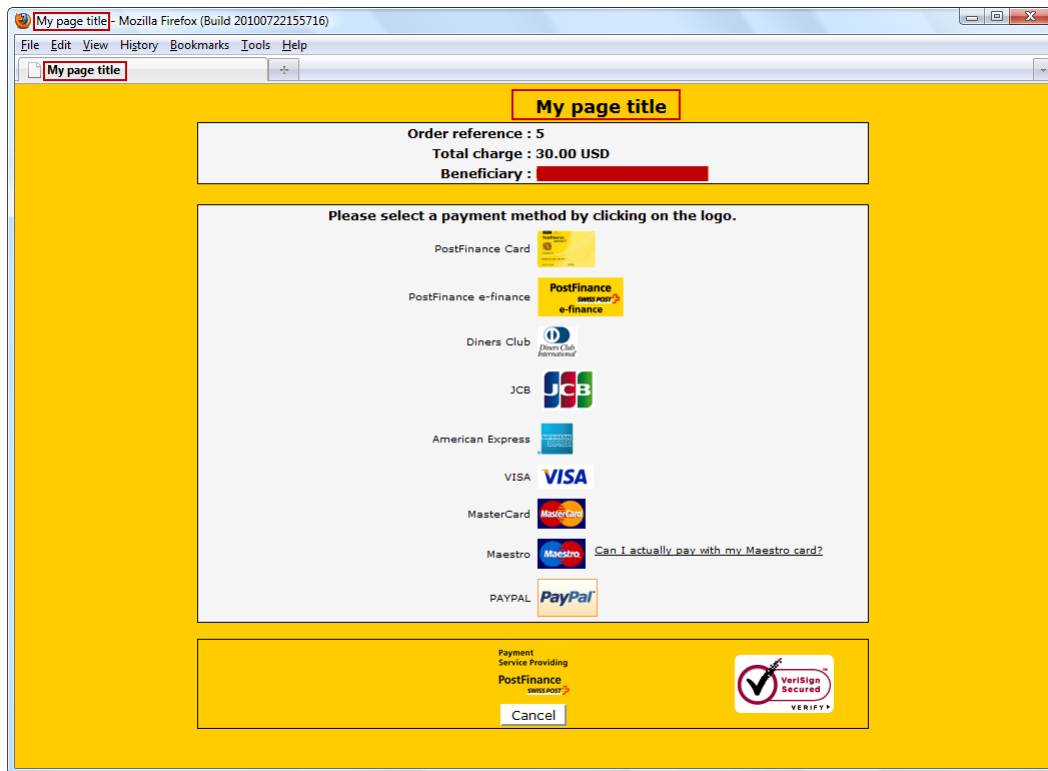


Figure 100: Swiss PostFinance Payment page

Once the payment is process on the Swiss PostFinance page shown in **Figure 100**, the user will be sent to the page illustrated in **Figure 101**.

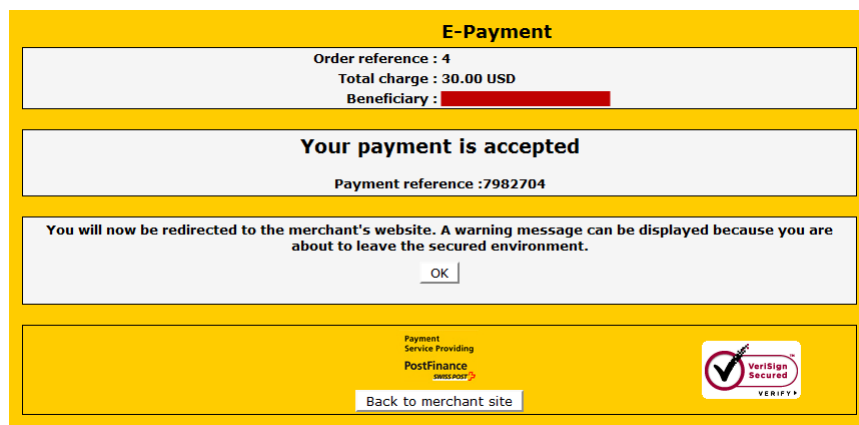


Figure 101: Swiss PostFinance successful payment page

Setting up your Swiss PostFinance account is out of the scope of this document. You should visit the Swiss PostFinance website and use their site resources (documentation and consulting) to properly configure your account.

7.4.5 Creating and Configuring the Ogone Payment Gateway

The Ogone (www.ogone.com) organization is an international seamless and secure payment solutions provider that offers online payment support.

CB Paid Subscriptions: New Payment gateway settings

Payment gateway settings

Type of payment gateway: Ogone

Name of gateway account:

Ordering: 2 last

Ogone E-Payments

Ogone E-Payments services settings:

Enable Ogone E-Payments: No

Ogone server: Normal Ogone server

Name of payment provider to show to your customers: Ogone

Ogone Shop id (PSPID):

Ogone SHA Pass phrase (SHA-IN):

Ogone SHA (SHA-IN) Hash algorithm: SHA-1

Ogone SHA Pass phrase (SHA-OUT):

URL to set into Ogone "Direct HTTP server-to-server request" and "HTTP request for status changes":

Payment type: Immediate sale

Ogone user interface language: English

Accept payment once: Payment is authorized and captured (means completed)

Anti-Fraud helping hidden fields

If the invoicing address corresponds to credit card invoicing address, sending these in hidden fields to Ogone might help for anti-fraud:

Send short description line of purchase: Yes

Send customers email address: Yes

Send customers invoicing address: Yes

Alias Manager Option

The "Alias Manager" feature allows to store safely the Credit Card at the payment server and to reference it in future payments. If you have subscribed to "Alias Manager" feature at Ogone, you can activate and configure it here:

Enable Alias Manager feature: Disabled

Presentation on this site

Selection of payment method: all methods available at the payment service provider

Payment Button: Pay Now, Buy Now, Subscribe, Click here to subscribe INSTANT ACCESS

Custom Button Text or image: Pay safely with %s

General settings

CSS class (e.g. "cbreg_green cbreg_admin_green"):

Owner id (only supported: 0 for now): 0

Presentation at the Payment Service Provider

This is for the styling of the static payment page at the Payment Service Provider:

Payment template type: Standard static payment template

Title text:

https://URL or filename of the logo to display at the top left:

Static payment page colors and text font

Background color:

Text color:

Table background color:

Table text color:

Button background color:

Button text color:

Font Family:

Phone-specific static default layout on iPhones: Yes

3D Secure presentation

Where to display the 3-D Secure window: 3-D Secure identification page display: Default

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Figure 102: Ogone Payment Gateway Setup

The Ogone payment organization specifics can be found at the following URL: www.ogone.com and we have included an overview of the Ogone test account configuration process in **chapter 18**.

Once you click on the **New** button or the **Create New** link shown in **Figure 62**, you will be presented with a drop-down selection mechanism soliciting the payment gateway type (see **Figure 63**). Once you select 'Ogone' from the drop-down list of available gateway types, you will be confronted with additional payment gateway parameters tailored to the Ogone gateway type case. You will be prompted to complete the following parameters:

- **Type of payment gateway:** [fixed value: Ogone]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'Ogone' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My Ogone Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our Ogone Gateway setup screen displays a framed area with the following parameters:

- **Enable Ogone E-Payments:** [initial value: No]
This Yes/No drop-down parameter permits us to specify the mode of operation our 'Ogone' gateway should operate under.
- No (default)
By default our new 'Ogone' gateway is not enabled – thus is off. If this setting is specified the gateway will not be presented as an option.

- Yes
Use this setting to enable single billing payments (no auto-recurring currently supported).
- **Ogone Server:** [initial value: Normal Ogone server]
This parameter is populated via a drop-down mechanism permitting the following 3 options:
 - Normal Ogone server
Use this option to configure your gateway for 'live' normal mode operations.
 - Test server
Use this option to configure your gateway to work with in demo mode. This setting should be used just for testing purposes in order to test the **Ogone** ↔ **CBSubs**™ workflows without incurring real payment costs.
 - Other server compatible with Ogone
This mode is used to configure other gateway organizations that have emulated/copied the Ogone model. When you select this option you will be presented with one additional field:
 - Server submission URL: [initial value: empty]
This text field parameter should be populated with the Ogone compatible server submission URL. The Ogone equivalent URL is:
<https://secure.ogone.com/ncol/prod/orderstandard.asp>
- **Name of payment provider to show your customers:** [initial value: Ogone]
This is the name of payment provider to show your customers in title of payment button and in other feedbacks.
- **Ogone Shopid (PSPID):** [initial value: empty]
Your Ogone shopid (case sensitive) should be populated in this field. You will be provided with this id (actually you will be specifying this) when you complete the Ogone account setup process (see **chapter 18**).

- **Ogone SHA Pass phrase (SHA-IN):** [initial value: empty]

This text field should be populated with your SHA Pass phrase as located in your Ogone account → Technical information → Data and origin verification tab as illustrated in **Figure 361**. Please notice that there are actually 2 SHA-IN Pass phrase fields on this Ogone page. The **CBSubs™** ↔ Ogone integration currently supports the e-Commerce mode and not the Directlink and Batch (Automatic) mode. So you would need to populate the first field on this Ogone tab and copy / paste it into the **CBSubs™** parameter field. Just click on the **Visible** button (next to the field in your Ogone page) to see the SHA-IN Pass phrase (converts '*****' to real characters).

- **Ogone SHA (SHA-IN) Hash algorithm:** [initial value: SHA-1]

This drop-down parameter is used to select the hashing algorithm used. You should match this value with the one specified in your Ogone account → Technical information → Global security parameters tab as illustrated in **Figure 359**.

- **Ogone SHA Pass phrase (SHA-OUT):** [initial value: empty]

This text parameter should be populated with the Pass phrase specified in your Ogone account → drop-down parameter is used to select the hashing algorithm used. You should match this value with the one specified in your Ogone account → Technical information → Transaction Feedback tab as illustrated in **Figure 365**.

- **URL to set into Ogone 'Direct http server-to-server request and http request for status changes:** [initial value: empty]

This area will generate a URL (once the previous parameters are populated and the Save or Apply button is pressed) that should be copied and pasted in various Ogone parameter areas. These areas are the Ogone account → Technical information → Transaction Feedback tab as illustrated in **Figure 365**.

You will also notice as illustrated in **Figure 365** that the Ogone Direct HTTP server to server request method setting can be set to either 'GET' or 'POST'.

CBSubs™ will work fine with either setting but 'POST' is the recommended setting here for security reasons. The 'GET' setting is easier for debugging since GET parameters go into web-server logs, but 'POST' setting is more secure and also produces smaller URLs.

- **Payment type:** [initial value: Immediate sale]

This drop-down parameter field is used to specify how payments should be handled by the gateway and **CBSubs™**. There are two applicable values:

- Immediate sale

This setting instructs **CBSubs™**/Ogone to process sale at once and without delay.

- Only reservation. Deferred sale.

This setting is used to reserve/authorize payment that must be manually finalized or rejected in the Ogone backend.

- **Ogone user interface language:** [initial value: English]

This drop-down parameter field is used to specify what language should be used by the Ogone website during the payment workflow with **CBSubs™**. At present there is no multi-language support and the available languages are: English, Deutsch, Francais, Italiano, Danish, Dutch, Flemish, Japanese, Norwegian, Polish, Portugese, Spanish, Swedish, Turkish.

- **Accept payment once:** [initial value: payment is authorized and captured (means completed)]

This drop-down parameter is used to specify when **CBSubs™** should consider payment as completed. There are three applicable values:

- Payment is authorized and captured (means completed)

This setting instructs **CBSubs™** to wait for the Ogone process to authorize and capture the payment.

- Even if payment is pending authorization, authorized or captured

This setting is used to instruct **CBSubs™** to consider the process as completed even before the Ogone end has authorized or captured the payment amount.

- Payment is authorized but not necessarily captured

This setting instructs **CBSubs™** to consider the process as completed (and activate the plan subscription) once the Ogone process indicates that the payment has been authorized (and even before the payment is captured / secured).

The next three payment gateway parameters deal with anti-fraud functionality that exists in the Ogone organization. If the invoicing address corresponds to credit card invoicing address, sending these in hidden fields to Ogone might help for anti-fraud:

- **Send short description line of purchase:** [initial value: Yes]

This Yes/No drop-down parameter is used to instruct **CBSubs™** to send or not send a hidden field to the Ogone website containing a short description of the purchase.

- **Send customers email address:** [initial value: Yes]

This Yes/No drop-down parameter is used to instruct **CBSubs™** to send or not send a hidden field to the Ogone website containing the customers email address.

- **Send customers invoicing address:** [initial value: Yes]

This Yes/No drop-down parameter is used to instruct **CBSubs™** to send or not send a hidden field to the Ogone website containing the customers invoicing address

The next parameter is related to the Alias Manager Option. The "Alias Manager" feature of the Ogone organization allows to store safely the Credit Card at the payment server and to reference it in future payments. If you have subscribed to the "Alias Manager" feature and properly configure it at the Ogone pages.

- **Enable Alias Manager feature:** [initial value: Disabled]

This drop-down parameter is used to instruct **CBSubs™** how it should interface with the Ogone Alias Manager feature. It can be configured with one of the following values:

- Disabled
This setting basically disables the feature.
- Enable only for recurring payments (not auto-recurring, but you can trigger payments from e-Terminal)
This setting has the Alias Manager enabled only for recurring payments. There is no auto-recurring operational at this time, but you can manually trigger payments from the e-Terminal area of your Ogone panel.
- Enabled for all payments
This setting has the Alias Manager enabled for all payments.

If this setting is enabled (using one of the last two drop-down options), then the following three additional fields will appear:

- **Text explaining to customer the reason for asking to store the financial coordinates:** [initial value: empty]
This text parameter should be populated with the message that should be displayed to customer when the process asks for permission to store the financial information of the customer (credit card number, etc.) for future use.
- **Text shown to customer about the restored hidden financial information:** [initial value: empty]
This text parameter should be populated with the message that should be displayed to customer when restoring the financial information that has previously be saved.
- **Alias name determined by:** [initial value: By Payment Service Provider]
This drop-down parameter is used to instruct **CBSubs™/ Ogone** how to determine the alias name to be used to reference the financial information that is stored in the Ogone system.

The next framed area is entitled 'DirectLink Option' and relates to Ogone's related DirectLink option (you need to consult Ogone helpdesk to enable this). You will need this Ogone feature enabled in order to be able to handle refunds from

CBSubs™. Initially this frame contains a single parameter:

- **Enable DirectLink feature:** [initial value: Disabled]

This drop-down parameter is used to instruct **CBSubs™** how it should interface with the Ogone DirectLink feature. It can be configured with one of the following values:

- Disabled
This setting basically disables the feature.
- Enable for auto-recurring payments

If this setting is enabled (using the last of the two drop-down options), then the following four additional fields will appear:

- **Current IP address of this server (See “I”):** [calculated value]

This calculated value parameter will show you the IP addresses your CBSubs installation is currently using as they can be configured in the relative Ogone technical area for the DirectLink feature functionality. You need to consult your Ogone helpdesk about how to properly use this information.

- **Ogone DirectLink and Ogone Batch (Automatic) SHA-IN Pass phrase (See “I”):** [initial value: empty]

This text field parameter should be populated with the SHA-IN Pass phrase as it is set in your Ogone account admin area → Technical Information → Data and origin verification tab → Checks for Ogone DirectLink and Ogone Batch (Automatic).

- **Ogone DirectLink API User name:** [initial value: empty]

This text field parameter should be populated with the username of the Ogone user you created on your Ogone account for API access. You should consult your Ogone helpdesk for instructions regarding this user creation process.

- **Ogone DirectLink API user password:** [initial value: empty]

This text field parameter should be populated with the password of the Ogone

user your created on your Ogone account for API access. You should consult your Ogone helpdesk for instructions regarding this user creation process.

The next parameter section is related to site presentation aspects of the payment gateway interaction between **CBSubs™** and Ogone. This parameter section is illustrated in **Figure 103**.

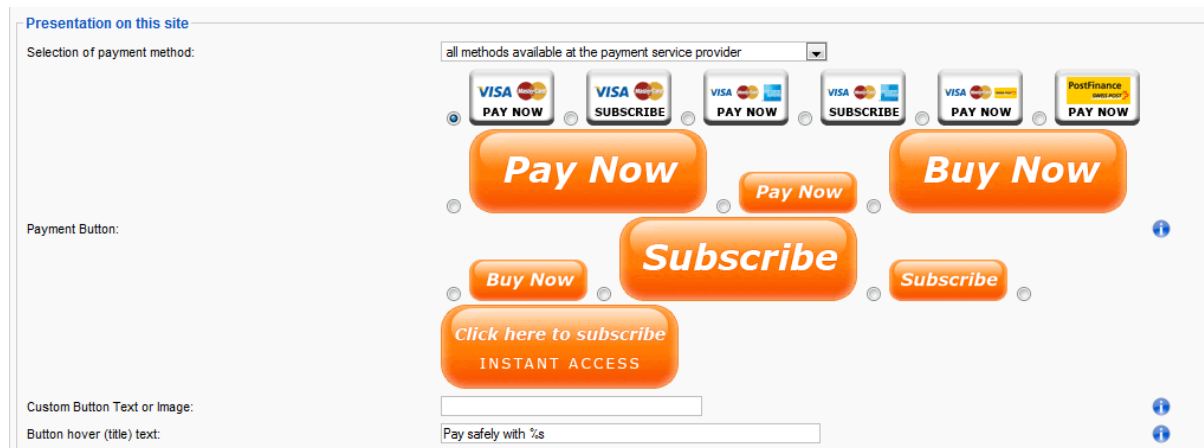


Figure 103: Ogone Presentation on this site parameters

- **Selection of payment method:** [initial value: All methods available at the payment service provider]
This drop-down parameter is used to instruct **CBSubs™/ Ogone** about what payment methods are to be used/presented to the user during the payment process. The following 2 values are possible:
 - 'All methods available at the payment service provider'.
This setting instructs **CBSubs™** to present all payment methods supported by the Ogone payment organization to **CBSubs™** plan purchasers during the checkout process.
 - 'only following payment methods of payment service providers'
This setting will automatically show two additional fields that will permit us to specify exactly which payment methods and extra functionality we would like to present to purchaser during checkout process.
- **Payment methods list:** [initial value: empty]
This text parameter should be populated with a comma separated list of

payment methods that should be presented. Available payment methods should be verified from the Ogone website. The following methods are currently supported: CreditCard, PostFinance card, PostFinance e-finance, PAYPAL, UNEUROCOM, CBS Online, CENTEA Online, Dexia Direct Net, eDankort, EPS, giropay, IDEAL, ING Homepay, KBC Online, MPASS, paysafecard, Direct Debits AT, Direct Debits DE, Direct Debits NL, Acceptgiro, Bank transfer, Payment on delivery, InterSolve, MiniTix, PingPing, TUNZ, Wallie.

- **Show “back” button on payment mask:** [initial value: empty]
This Yes/No drop-down select parameter only appears if the ‘only following payment methods of payment service providers’ was previously specified and it is used to specify if a “back” button is to appear on the payment form allowing the purchaser to change the selected payment method.
- **Payment button:** [initial value: first radio field selected]
This radio button parameter is used to select the payment button that should be used for the Ogone payment gateway. As you can see from **Figure 103** there are many available button icons and if there is nothing in the list that appeals to you, the next parameter can be used to manually specify a text or icon button.
- **Custom text or image:** [initial value: empty]
Use this text parameter to specify the custom text that should appear as a payment button or enter the URL of a custom image (gif, jpg or bmp) that should be used as a payment button.
- **Button hover (title) text:** [initial value: Pay safely with %s]
This text parameter is use dto specify the hover popup and title text of the payment button. The %s value in the string will be substituted with the name of the payment method chosen.

After the ‘Presentation on this site’ set of parameters we will be asked to populate the ‘General settings’ parameter set.

- **CSS class (e.g. 'cbreg_green cbreg_admin_green'):** [initial value: empty]

This text field parameter allows you to specify the format (expressed via a specific CSS class) that will be used when presenting gateway payments.

There are two types of CSS classes predefined: the frontend class and the backend class (this has the `_admin_` part in its name). Predefined classes that may be used include:

- `cbreg_green cbreg_admin_green`
- `cbreg_red cbreg_admin_red`
- `cbreg_orange cbreg_admin_orange`
- `cbreg_blue cbreg_admin_blue`
- `cbreg_cyan cbreg_admin_cyan`
- `cbreg_yellow cbreg_admin_yellow`
- `cbreg_magenta cbreg_admin_magenta`

- **Owner Id (only supported: 0 for now):** [initial value: 0]

This is the owner of current gateway account value. At present only 0 value (system) is supported.

The next gateway parameter set deals with the Presentation at the Payment Service Provider related settings. There are basically two (2) field sets that will appear in this area depending on the value selected for the first parameter setting 'Payment template type'.

- **Payment template type:** [initial value: Standard static payment template]

This drop-down field parameter accepts one of two values:

- 'Standard static payment template'

This setting is the default static template setting supported by the Ogone organization. Once selected the remaining parameter fields in the 'Presentation at the Payment Service Provider' set will appear as illustrated in **Figure 104**.

Presentation at the Payment Service Provider

This is for the styling of the static payment page at the Payment Service Provider:

Payment template type:

Title text:

https:URL or filename of the logo to display at the top left:

Static payment page colors and text font

Background color:

Text color:

Table background color:

Table text color:

Button background color:

Button text color:

Font Family:

iPhone-specific static default layout on iPhones:

3D Secure presentation

Where to display the 3-D Secure window:

3-D Secure identification page display:

Figure 104: Presentation at the Payment Service Provider - Standard static payment template

- 'Dynamic payment template from your site'

This setting should be used only after contacting the Ogone organization and studying their advanced documentation. Once selected the remaining parameter fields in the 'Presentation at the Payment Service Provider' set will appear as illustrated in **Figure 98**.

Presentation at the Payment Service Provider

This is for the styling of the static payment page at the Payment Service Provider:

Payment template type:

Dynamic payment page

This page is fetched from your site by the payment server and displayed in https, so all its references must be absolute.

URL of your html template page:

Title text:

https:URL or filename of the logo to display at the top left:

iPhone-specific static default layout on iPhones:

3D Secure presentation

Where to display the 3-D Secure window:

3-D Secure identification page display:

payment_template_type

You need to contact Swiss PostFinance and study their advanced documentation if you want to change this from static to dynamic.

Figure 105: Presentation at the Payment Service Provider - Dynamic payment template

If the 'Standard static payment template' value is specified for the Payment template type parameter, then the following field parameters are requested:

- **Title text:** [initial value: empty]

The text placed in this parameter will be used as the title on the static payment

page presented by the Ogone website during the payment process. For example, if we set this value to 'My page title' we would see it appearing in our browser and also in the actual page content as illustrated in **Figure 106**.

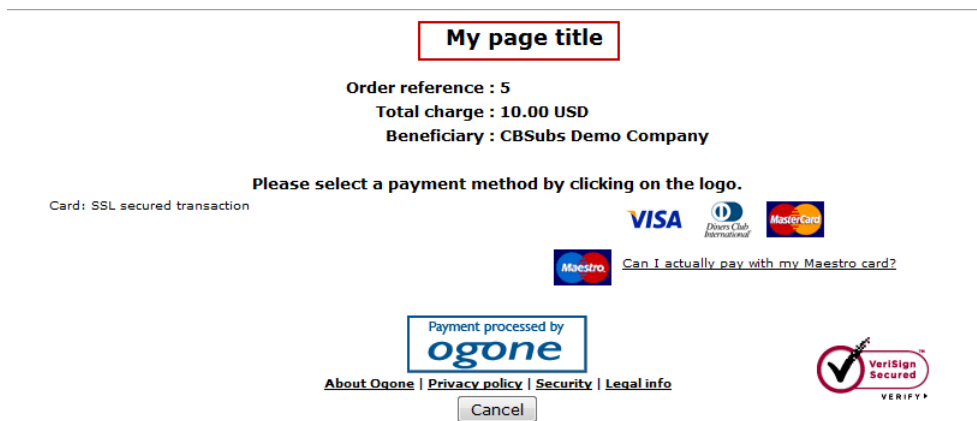


Figure 106: Ogone page title field result

- **[https:URL or filename of the logo to display at the top left:](#)** [initial value: empty]

This is the URL or the filename (if you have stored your logo on the Ogone site) of the logo you want displayed on the Ogone payment page next to the title (see previous parameter). The logo needs to be stored on a secure server (<https://>). If you do not have a secure environment to store your logo you can use the Ogone organization to activate the 'Logo Hosting' option on your account.

The next parameter fields deal with the 'Static payment page colors and text fonts'.

- **[Background color:](#)** [initial value: empty/white]

This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'white' will be used.

- **[Text color:](#)** [initial value: empty/black]

This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left

empty 'black' will be used.

- **Table background color:** [initial value: empty/white]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'white' will be used.
- **Table text color:** [initial value: empty/black]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'black' will be used.
- **Button background color:** [initial value: empty/white]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'white' will be used.
- **Button text color:** [initial value: empty/black]
This can be a CSS color name (e.g., white) or a value (e.g., #ffffff). If left empty 'black' will be used.
- **Font family:** [initial value: empty/Verdana]
This is the font family (e.g., arial, verdana, times, etc) that is to be used on the payment page generated by the Ogone website.
- **iPhone specific static default layouts on iPhones:** [initial value: Yes]
Presents an iPhone specific layout making payments easier on iPhones and iPads.
- **3D secure identification page display:** [initial value: Default (in the main window)]
This drop-down field parameter specifies how the 3D secure identification page should be displayed by the Ogone website during the payment process and can be set to one of the following values:
 - 'Default (in the main window)'
 - 'in the main window (recommended by VISA/MasterCard)'
 - 'in a POPUP window and return to main window at the end'

If the 'Dynamic payment template from your site' setting was specified for the Payment template type parameter, then the following field parameter will be displayed.

- **URL of your html template page:** [initial value: empty]

This text field parameter is used to specify the http or https URL of your template page with “\$\$\$PAYMENT_ZONE\$\$\$” in it. The URL must be absolute (contain the full path), it cannot be relative. Only standard ports 80 and 443 are supported. If the URL is to a Joomla page, then it should be https. If URL is http then all internal links on this page must be https because the page will be proxied by the Ogone process to https. You can study more about templating in the Ogone webpage and the relevant documentation.

In **Figure 107** we have illustrated what the Ogone PAY NOW button will look like in the **CBSubs™** payment page.

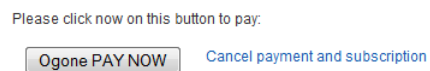


Figure 107: Ogone pay now button in CBSubs payment process

If the Ogone PAY NOW button is selected, then **CBSubs™** will redirect the user to the Ogone page as illustrated in **Figure 108**. As you can see in this figure there are four payment methods available for selection (VISA, MasterCard, DINERS and Maestro) because we have configured 4 payment methods on our Ogone test account (see **chapter 18**).



Payment confirmation

Order reference : 4
Total charge : 10.00 USD
Beneficiary : CBSubs Demo Company

Please select a payment method by clicking on the logo.

Card: SSL secured transaction





[Can I actually pay with my Maestro card?](#)

Payment processed by
ogone

[About Ogone](#) | [Privacy policy](#) | [Security](#) | [Legal info](#)

Cancel



Figure 108: Ogone Payment page

Once the payment method is selected (e.g., VISA) on the Ogone payment page shown in **Figure 108** the Ogone payment confirmation page is shown as illustrated in **Figure 109**.

Payment confirmation

Order reference : 4
Total charge : 10.00 USD
Beneficiary : CBSubs Demo Company

Pay with : **VISA**




Card holder's name* :

Card number* :

Expiry date (mm/yyyy)* : /

Card verification code* : [What is this ?](#)

* Mandatory fields

Payment processed by
ogone

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Back

Cancel




Figure 109: Ogone payment confirmation page

If our Ogone gateway is set to test operation mode, then we need to use one of the test cards provided by the Ogone test account on the Technical information Test Info tab as illustrated in **Figure 369**. Setting up your Ogone account is out of the scope of this document but we have included a chapter describing the test account setup – see **chapter 18**. You should visit the Ogone website and use their site resources (documentation and consulting) to properly configure your production account.

Off-line payment gateways are used to handle off-line payments. Typical examples of off-line payments are: bank transfer, cash, checks, etc. In such cases there is an off-line process that takes place, which in most cases includes manual steps (e.g., mailing a check, visiting a bank, etc.). These cases are also supported by **CBSubs™** by creating an 'Off-line' Payment Gateway.

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The 'Off-line' Payment Gateway configuration setup, illustrated in **Figure 110**, has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: Off-line]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'Off-line' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My Off-line Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our Off-line Gateway setup screen displays an 'Offline' framed area with the following parameters:

- **Enable Offline payments:** [initial value: No]
This Yes/No drop-down select parameter is used to enable/disable the off-line payment gateway.
- **Payment selection leads to the following order state:** [initial value: Pending (Recommended) with completion in CBSubs admin area Payment Baskets]
This parameter can be set to one of the following values:
 - Pending (Recommended) with completion in CBSubs admin area Payment Baskets
 - Completed, giving immediate access WITHOUT PAYMENT

The Offline payment gateway setup continues with a 'Currencies accepted' framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and 'Allow currency selection at checkout:' is enabled – see **Chapter**

7.3.1.4) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]
This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.
- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]
This parameter allows you to instruct **CBSubs™** how to handle the case of basket currency not supported by payment organization. It is a drop-down field parameter accepting one of the following values:
 - Hide this method if basket currency mismatches
This means that Gateway should not be proposed as a payment method if the currency is not supported
 - Ask if user wants to convert basket currency to pay
This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that the Gateway supports. With this value selected an extra text parameter will be presented 'Confirmation text to ask user for conversion:'

After the 'Offline' framed area, a 'Presentation' framed area is displayed that has the following parameters:

- **Instructions Text:** [initial value: see **Figure 110**]
The text editor area parameter should be populated with the exact wording you want your off-line payers to see. Detailed instructions should be given to instruct your users how they should go about completing the process.
- **Payment button:** [Initial value: not selected]



Currently there is one icon button that can be selected.




- **Custom Button Text or Image:** [initial value: empty]




This text field should be populated with a URL of an image or the actual text that should be used as a button for off-line payments.

Finally, a 'General settings' frame is displayed with the following 2 parameters:

- **CSS class (e.g., 'cbreg_green cbreg_admin_green'):** [initial value: empty]
The CSS class that should be used for this gateway. See **Figure 111** to see the results of this parameter.
- **Owner id (only supported: 0 for now):** [initial value: 0]

Payment Gateway Accounts
Payment gateways settings.

 **Payment Gateways** [Create New](#) Filter: Gateway type:  --- By type --- 

#	<input type="checkbox"/>	Gateway Name	Gateway type	Enabled	Payment Gateway	Order		Owner	Payment Baskets	Notifications	Change Logs	Id
1	<input type="checkbox"/>	Test Gateway	Dummy test-gateway	Single and Recurring billings	Testmode gateway	 1		System	5	5	1	1
2	<input type="checkbox"/>	Off-line Gateway	Off-line	Single billings	Normal gateway	 2		System	2	6	1	2

Display # << Start < Prev 1 Next > End >> Results **1 - 2** of total **2**

Figure 111: CSS Classes for Payment Gateways

7.4.7 Creating and Configuring a Dummy test Gateway

Real gateways are needed to earn real money from your CB Paid Subscription powered site, but setting up and testing your entire environment is best accomplished by setting up a 'Dummy test Gateway'.

This 'dummy' gateway will allow you to perform all needed tests and iron out all issues before going live. It will simulate credit card payments. You can see a sample 'Dummy' gateway configuration in **Figure 112**. After you have finished testing and are satisfied with the results you can just disable (un-publish) this 'dummy' gateway and publish your 'real-live' gateway (e.g., paypal, authorize.net or yellowpay).

The screenshot displays the 'Payment gateway settings' interface for a 'Dummy test-gateway'. The configuration is organized into several sections:

- Payment gateway settings:**
 - Type of payment gateway: Dummy test-gateway
 - Name of gateway account: Dummy
 - Ordering: 1 (Dummy)
- Gateway account settings:**
 - Enable Dummy test-account: Yes: Single payments or Automated Recuring Billing at user's choice for autorecurring plans
 - Gateway server selection: Dummy internal test gateway
- Presentation:**
 - Ask for card billing address for AVS: No
 - Payment Button type: Credit-cards Logo images
 - Payment Choice type: Credit-cards Logo images
 - Custom button text/image: (empty field)
 - Accepted credit cards: Includes checkboxes and logos for Visa, Mastercard, American Express, Discover, Diners Club International, and JCB.
- General settings:**
 - CSS class (e.g. 'cbreg_green cbreg_admin_green'): (empty field)
 - Owner id (only supported: 0 for now): 0

Figure 112: Dummy Gateway Configuration

7.4.8 Creating and Configuring a CCBill Payment Gateway

CCBill (www.ccbill.com) is an online merchant services & credit card payment processing organization that is supported in **CBSubs™** by downloading and installing the **CCBill** payment integration plugin as described in **Chapter 6.24**.

The **CCBill** Payment Gateway configuration setup has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: CCBill]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'CCBill' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My CCBill Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our CCBill Gateway setup screen displays an 'CCBill Payment Service Provider (PSP) E-Payments' framed area that contains extra parameter settings and additional sub-framed areas.

- **Enable CCBill E-payments:** [initial value: 'No']
This drop-down select parameter is used to disable or enable (for specific payment types) the CCBill payment gateway. The following options are available:
 - 'No'
 - 'Enable single payments'
 - 'Enable auto-recurring payments'

- 'Enable single and auto-recurring payments at user's choice'
- **CCBill server:** [initial value: 'Normal CCBill server']

This drop-down select parameter field accepts the following options:

 - 'Normal CCBill server'
 - 'Other server compatible with CCBill'
- **Server submission URL:** [initial value: empty]

This text field parameter will appear only if the 'CCBill server' parameter is set to 'Other server compatible with CCBill' and should be populated with the URL of the compatible service that relates to the bill.ccbill.com/post/signup.cgi URL.
- **CCBill client account number:** [initial value: empty]

This is the CCBill client account number found under your CCBill Client Account on the left of the drop-down.
- **CCBill sub account number:** [initial value: empty]

You need to copy the value from your CCBill Account Info → Manage the Sub Accounts → Sub Account Admin → Sub Account area.
- **CCBill form name:** [initial value: empty]

This is the form name created on your CCBill account. See **Chapter 7.4.8.1** for additional assistance.
- **CCBill ecommerce MD5 salt:** [initial value: empty]

See **Chapter 7.4.8.1** for additional assistance:

 - URL to set into CCBill admin area in Account Info - Sub Account Admin - Select Sub Account - Basic - "Subaccount Basic Info " - "Approval URL":
 - URL to set into CCBill admin area in Account Info - Sub Account Admin - Select Sub Account - Basic - "Subaccount Basic Info " - "Denial URL":
 - URL to set into CCBill admin area in Account Info - Sub Account Admin - Select Sub Account - Advanced - "Background Post Information" -

"Approval Post URL" and "Denial Post URL":

- **CCBill user interface language:** [initial value: English]

This drop-down select parameter field should be set to the user interface language that should be used and can be set to one of the following:

- English
- Spanish
- French
- German
- Italian
- Japanese
- Korean
- Honk Kong/Chinese
- Traditional Chinese

- **Accept payment at once:** [initial value: 'Payment is authorized and captured (means complete)']

This drop-down select parameter field is used to instruct CBSubs when to accept payment based on various CCBill related payment statuses. The following options are available:

- 'Payment is authorized and captured (means complete)'
- 'Even if payment is pending authorization, authorized or captured'
- 'Payment is authorized but not necessarily captured'

Please consult your CCBill specialists for exact meaning of above options.

The 'Anti-Fraud-helping hidden fields' framed area contains the following parameters:

- **Send customers email address:** [initial value: 'Yes']
- **Send customers invoicing address:** [initial value: 'Yes']
- **Send customers phone number:** [initial value: 'Yes']

The 'Datalink Option' framed area contains the following parameters:

- **Enable DataLink feature:** [initial value: 'Disabled']
This drop-down parameter field is used to specify that the DataLink feature is enabled on the CCBill side and should be used to handle auto-recurring payments. Available options are:
 - Disabled
 - Enabled for auto-recurring payments
- **CCBill DataLink API username:** [initial value: empty]
This text parameter field will only appear if the 'Enable DataLink feature:' field is set to 'Enabled for auto-recurring payments'. It needs to be populated with the CCBill DataLink API username specified in your CCBill account.
- **CCBill DataLink API password:** [initial value: empty]
This text parameter field will only appear if the 'Enable DataLink feature:' field is set to 'Enabled for auto-recurring payments'. It needs to be populated with the CCBill DataLink API password specified in your CCBill account.

The 'Presentation on this site' framed area contains the following parameter:

- **Name of payment provider to show to your customers:** [initial value: CCBill, our PCI-certified payment service provider]
This text field parameter is used to specify the name of the payment provider to show to your customers in the title of the payment button and in feedbacks.

Finally, a 'General settings' frame is displayed with the following 2 parameters:

- **CSS class (e.g., 'cbreg_green cbreg_admin_green'):** [initial value: empty]
The CSS class that should be used for this gateway. See **Figure 111** to see the results of this parameter.
- **Owner id (only supported: 0 for now):** [initial value: 0]

7.4.8.1 CCBill Account Guidelines

The CCBill account opening and configuration process is quite involved and you should contact the CCBill helpdesk for assistance.

We recommend the following actions needed on the CCBill side:

1. Dynamic Pricing = Enabled for ALL accounts and forms
2. MD5-Salt (needed later, used to sign requests)
3. Payment Price Display (For Purchase Of \$XYZ) = So the false durations don't display oddly (e.g. "\$100 for 2 days" to "for purchase of \$100")
4. Subscription Management Services (DataLink) = Enabled for ALL accounts and forms
5. Background Post = Enabled for ALL accounts and forms

Once the above is acquired you'll be able to configure the gateway as follows.

1. Login at admin.ccbill.com/
2. Add Client Account Number to gateway configuration (found under Client Account to left of drop-down)
3. Navigate to Account Info > Manage the Sub Accounts > Sub Account Admin > Sub Account
4. Add Sub Account Number to gateway configuration (found under Client Account IN drop-down)
5. Navigate to Account Info > Manage the Sub Accounts > Sub Account Admin > Sub Account > Advanced
6. Add Encryption key (MD5-Salt requested earlier) to gateway configuration
7. Navigate to Account Info > Manage the Sub Accounts > Sub Account Admin > Sub Account > Form Admin
8. Create new form of type AT LEAST "Credit Card"
9. Add Form Name to gateway configuration (provided after saving form)
10. Navigate to Account Info > Data Link Services Suite > Add User
11. Supply requested information
12. Add datalink Username and Password to gateway configuration
13. APPLY gateway (so it doesn't close, we're not done!)
14. Navigate to Account Info > Manage the Sub Accounts > Sub Account Admin > Sub Account > Advanced
15. Copy approval and denial post URL to "Approval Post URL" and "Denial Post URL"
16. Click "Update"
17. Navigate to Account Info > Manage the Sub Accounts > Sub Account Admin > Sub Account > Basic
18. Copy approval and denial URLs to "Approval URL" and "Denial URL" (NOT POST URLS!)
19. Set "Denial Redirect Time" to "Instant"
20. Click "Update"

If you should encounter problems configuring your CCBill **CBSubs™** Gateway you can post your questions on the CBSubs forums.

Please note that CCBill has the following characteristics (verify with CCBill for possible changes):

- CCBill only permits recurring payments of 30/60/90 days
- CCBill only permits single payments no less than 2 days and all payments no greater than 365 days. Please create your plans accordingly.

7.4.9 Creating and Configuring an Payza Payment Gateway

Payza (www.payza.com) is an online payment processing organization that is supported in **CBSubs™** by downloading and installing the **Payza** payment integration plugin as described in **Chapter 6.25**. As this organization has been rebranded from its previous AlertPay brand some parts of these instructions might not be current as there are many alterations in progress at the payment organization side.

The **Payza** Payment Gateway configuration setup has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: Payza]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'Payza' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My Payza Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our Payza Gateway setup screen displays a 'Payza Payment Service Provider (PSP) E-Payments' framed area that contains extra parameter settings and additional sub-framed areas.

- **Enable Payza E-payments:** [initial value: 'No']
This drop-down select parameter is used to disable or enable (for specific payment types) the Payza payment gateway. The following options are available:

- 'No'
 - 'Enable single payments'
 - 'Enable auto-recurring payments'
 - 'Enable single and auto-recurring payments at user's choice'
- **Payza server:** [initial value: 'Normal Payza server']

This drop-down select parameter field accepts the following options:

 - 'Normal Payza server'
 - 'Payza Sandbox server'
 - 'Other server compatible with Payza'
- **Server submission URL:** [initial value: empty]

This text field parameter will appear only if the 'Payza server' parameter is set to 'Other server compatible with Payza' and should be populated with the URL of the compatible service that relates to the www.payza.com/checkout URL.
- **Payza merchant (email):** [initial value: empty]

This text field parameter should be populated with your Payza account email address.
- **Payza API password:** [initial value: empty]

This text field parameter should be populated with your Payza API password as it appears on your Payza → API → API Setup page in the API Password parameter.
- **Payza IPN security code:** [initial value: empty]

This text field parameter should be populated with the Payza IPN security code as it appears on the Payza Tools → IPN → IPN Setup area.
- **URL to set into Payza admin area in Tools - IPN - IPN Setup - "Alert URL":** [initial value:]

The URL generated here should be copy/pasted in your Payza URL parameter on the Payza account admin area.

- **Accept payment at once:** [initial value: 'Payment is authorized and captured (means complete)']

This drop-down select parameter field is used to instruct CBSubs when to accept payment based on various Payza related payment statuses. The following options are available:

- 'Payment is authorized and captured (means complete)'
- 'Even if payment is pending authorization, authorized or captured'
- 'Payment is authorized but not necessarily captured'

Please consult your Payza specialists for exact meaning of above options.

The 'Anti-Fraud-helping hidden fields' framed area contains the following parameters:

- **Send customers email address:** [initial value: 'Yes']
- **Send customers invoicing address:** [initial value: 'Yes']
- **Send customers phone number:** [initial value: 'Yes']

After the 'Anti-Fraud-helping hidden fields' framed area the following parameter is solicited:

- **Notification host (leave blank):** [initial value: empty]

The 'Presentation on this site' framed area contains the following parameter:

- **Name of payment provider to show to your customers:** [initial value: Payza, our PCI-certified payment service provider]

This text field parameter is used to specify the name of the payment provider to show to your customers in the title of the payment button and in feedbacks.

The 'Single payments at a time' framed area follows and contains the parameters:



- **Payment Button:** [initial value:]
This radio field parameter selector is used to specify which icon CBSubs is to display when a single payment at a time case appears using the Payza gateway.
- **Custom Payment Button Text or Image:** [initial value: empty]
This text field parameter is used to specify the text or the URL of an image that is to be used for the payment button.
- **Payment Button hover (title) text:** [initial value: Pay safely with %s]
Use this text field parameter to specify the title text to be shown when mouse pointer hovers over the payment button.

The 'Recurring subscribed payments multiple times' framed area follows and contains the parameters:



- **Payment Button:** [initial value:]
This radio field parameter selector is used to specify which icon button CBSubs is to display when an auto-recurring subscription payment case appears using the Payza gateway.
- **Custom Payment Button Text or Image:** [initial value: empty]
This text field parameter is used to specify the text or the URL of an image that is to be used for the payment button.
- **Payment Button hover (title) text:** [initial value: Pay safely with %s]
Use this text field parameter to specify the title text to be shown when mouse pointer hovers over the payment button.

Finally, a 'General settings' frame is displayed with the following 2 parameters:

- **CSS class (e.g., 'cbreg_green cbreg_admin_green'):** [initial value: empty]
The CSS class that should be used for this gateway. See **Figure 111** to see the results of this parameter.
- **Owner id (only supported: 0 for now):** [initial value: 0]

7.4.9.1 Payza Account Guidelines

The Payza account opening and configuration process is quite involved and you should contact the Payza helpdesk for assistance.

During the Payza (and the former AlertPay) CBSubs payment gateway internal testing we have identified an issue in their API that has not been fixed yet.

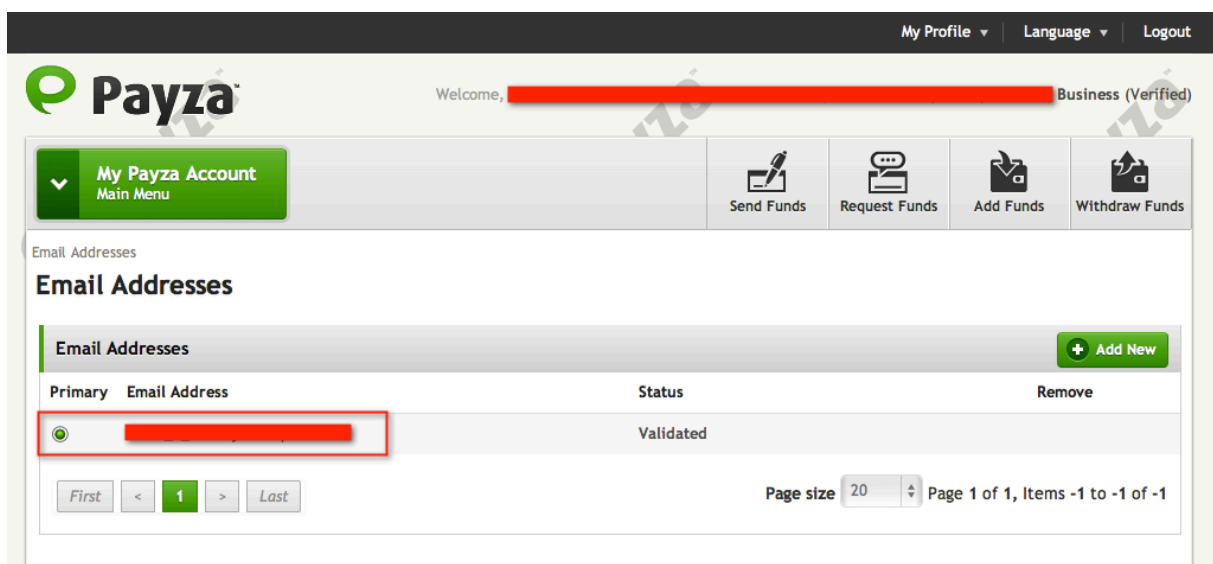


Figure 113: Payza Primary Email address

The screenshot displays the Payza user interface. At the top, there's a dark header with 'My Profile', 'Language', and 'Logout' links. Below this, the Payza logo is on the left, and a welcome message 'Welcome, Seller_1_Fname_Nant Seller_1_Lname_Nant (seller_1_nant@joomlapolis.com) Business (Verified)' is on the right. The main content area features a green 'My Payza Account Main Menu' button. To its right are four action buttons: 'Send Funds', 'Request Funds', 'Add Funds', and 'Withdraw Funds'. A dropdown menu is open from the 'My Payza Account' button, showing three columns of options: 'MY TRANSACTIONS' (Home Page, History), 'ACCOUNT VERIFICATION' (Verification), 'MANAGE MY MONEY' (My Credit Cards, My Bank Accounts, My Prepaid Card, Purchased Subscriptions, Payment Preferences, Manage & Exchange Currencies, My Referral Program), and 'MANAGE MY BUSINESS' (Manage Business Profiles, Manage Websites, Manage Buy Now Buttons, Manage Donate Buttons, Manage Subscriptions, Manage Terms of Service, IPN Advanced Integration, API Advanced Integration). The 'IPN Advanced Integration' and 'API Advanced Integration' options are highlighted with red boxes. Below the menu, there's a section for 'IPN Simulator' with instructions on how to use it. Further down, a 'More information' section lists links to guides and documentation. The footer contains the copyright notice 'Copyright © 2012 All Rights Reserved "Payza"'.

My Profile | Language | Logout

Welcome, Seller_1_Fname_Nant Seller_1_Lname_Nant (seller_1_nant@joomlapolis.com) Business (Verified)

My Payza Account
Main Menu

Send Funds | Request Funds | Add Funds | Withdraw Funds

MY TRANSACTIONS
Home Page
History

ACCOUNT VERIFICATION
Verification

MANAGE MY MONEY
ADD My Credit Cards
ADD My Bank Accounts
ADD My Prepaid Card
Purchased Subscriptions
Payment Preferences
Manage & Exchange Currencies
My Referral Program

MANAGE MY BUSINESS
Manage Business Profiles
ADD Manage Websites
Manage Buy Now Buttons
Manage Donate Buttons
Manage Subscriptions
Manage Terms of Service
IPN Advanced Integration
API Advanced Integration

any transactions, including the Reference Number, your security receipt and fulfilling orders.

Use it to activate your IPN process/feature, to allow encrypted payment details (EPD) and to enable a test mode

Search transactions using filters that allow you to find IPNs which are complete, failed or attempt again

IPN Simulator
Use it to verify your pre-defined settings. However, we encourage you to use the SANDBOX, where you will have more control over transactions and features.

More information

- Coding knowledge necessary
- Review [Integration Best Practices Guide](#)
- Dynamically generate "Buy Now" and "Subscribe Now" buttons.
- For information about Advanced Integration, [click here](#)
- Payza Integration Guide

Copyright © 2012 All Rights Reserved "Payza"

Figure 114: Payza IPN and API Advanced Integration menus

[Advanced API Integration](#) / [API Instructions](#) / [API Settings](#)

API Settings

Activate API

API Status

- ☐ Disabled
- ☒ Enabled

Enabling the API will make it possible to send money through the Payza API.

API Password

dWy3yWjLwMh7Qc5V

This is the password you will use to access the Payza API. Please take note of it. If you lose your password, click on the "Generate New" button to get a new password. Do not provide your API Password to any third parties as this information can result in money being lost or stolen. Passwords are meant for the account holder only and are never to be shared with others. Payza will not be liable for any resulting damages if this information is shared.

Test Mode

Test Mode

- ☒ Disabled
- ☐ Enabled

If "Test Mode" is enabled, the transactions you submit through the Payza API will not be completed. Use this setting when developing your solution.

IP Address

Restrict by IP

- ☒ Disabled
- ☐ Enabled

If restrict by IP is enabled, the Payza API will only allow transactions performed from the IP addresses you enter below.

Update

Cancel

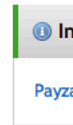


Figure 115: Payza API Password

[Advanced IPN Integration](#) / [IPN Instructions](#) / [IPN Setup](#)

IPN Setup

Activate IPN

Professional Business (seller_1_nant@joomlapolis.com)

IPN Status

☐ Disabled

☒ Enabled

Enable IPN Version 2

☐ Disabled

☒ Enabled

Allow Encrypted Payment Details (EPD)

☐ Disabled

☒ Enabled

Enable EPD Version 2

☒ Disabled

☐ Enabled

Alert URL

[? Help](#)

IPN Security Code

This code will be sent with all Payza confirmation data.

[Generate New](#)

Test Mode

☒ Disabled

☐ Enabled

This code will be sent with all Payza confirmation data.

Figure 116: Payza IPN setup

Instructions:

Main Menu > API Advanced Integration > API Setup

- ENABLED
- NEEDED: API Password
- CLICK: Update

Main Menu > IPN Advanced Integration > IPN Setup

- ENABLED
- ENABLED: Allow Encrypted Payment Details (EPD)
- SUPPLY: Payza URL (generated in gateway settings)
- NEEDED: IPN Security Code

- ENABLED: Enable IPN Version 2
- CLICK: Update

With bug present:

Tools > IPN > IPN Setup

- ENABLED
- ENABLED: Allow Encrypted Payment Details (EPD)
- SUPPLY: Payza URL (http://www.LIVESITE.com/cbsubs_payza.php)
- NEEDED: IPN Security Code
- ENABLED: Enable IPN Version 2
- CLICK: Update

.htaccess (at Joomla root)

Options +FollowSymLinks

RewriteEngine On

RewriteRule ^cbsubs_payza.php\$ Alert URL (generated in gateway settings with live site omitted starting with index.php) [L]

7.4.10 Creating and Configuring an Quickpay Payment Gateway

Quickpay (www.quickpay.net) is an online payment processing organization that is supported in **CBSubs™** by downloading and installing the **Quickpay** payment integration plugin as described in **Chapter 6.26**.

The **Quickpay** Payment Gateway configuration setup has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: QuickPay]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'QuickPay' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My QuickPay Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our QuickPay Gateway setup screen displays a 'QuickPay Payment Service Provider (PSP) E-Payments' framed area that contains extra parameter settings and additional sub-framed areas.

- **Enable QuickPay E-payments:** [initial value: 'No']
This drop-down select parameter is used to disable or enable (for specific payment types) the QuickPay payment gateway. The following options are available:
 - 'No'
 - 'Enable single payments'

- **QuickPay server:** [initial value: 'Normal QuickPay server']

This drop-down select parameter field accepts the following options:

- 'Normal QuickPay server'
- 'QuickPay test server'
- 'Other compatible server with QuickPay'

- **Server submission URL:** [initial value: empty]

This text field parameter will appear only if the 'QuickPay server' parameter is set to 'Other compatible server with QuickPay' and should be populated with the URL of the compatible service that relates to the secure.quickpay.dk/form URL.

- **QuickPay Quickpayid:** [initial value: empty]

This text field parameter should be populated with your Quickpayid as it appears at QuickPay → Settings → Merchant → quickpayid. Please see **Chapter 7.4.10.1** for further assistance.

- **QuickPay MD5 secret:** [initial value: empty]

This text field parameter should be populated with your QuickPay MD5 secret as it appears at QuickPay → Settings → MD5 Secret → MD5 Secret. Please see **Chapter 7.4.10.1** for further assistance.

- **QuickPay API key:** [initial value: empty]

This text field parameter should be populated with the QuickPay API key as it appears at QuickPay → Settings → API Access → API key. Please see **Chapter 7.4.10.1** for further assistance.

- **QuickPay Order ID Prefix:** [initial value: cbsubs]

An alphanumeric string that is prepended to the basketid in order to generate the ordered that is sent to QuickPay. Assuming that the basketid of a new website starts at 1,2,3,..., then this string should be at least 3 characters in length (since QuickPay needs a minimum of 4 chars ordered string).

- **URL to set into QuickPay admin area in Settings – Merchant – “Callback url”:** [initial value:]

This URL is calculated by **CBSubs™** after Save or Apply icon is clicked and should be copied over to the QuickPay → Settings → Merchant → Callback url parameter area on QuickPay site. Please see **Chapter 7.4.10.1** for further assistance.

The ‘Anti-Fraud-helping hidden fields’ framed area contains the following parameters:

- **Send customers email address:** [initial value: ‘Yes’]
- **Send customers invoicing address:** [initial value: ‘Yes’]
- **Send customers phone number:** [initial value: ‘Yes’]

After the ‘Anti-Fraud-helping hidden fields’ framed area the following parameter is solicited:

- **Notification host (leave blank):** [initial value: empty]

The QuickPay payment gateway setup continues with a ‘Currencies accepted’ framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and ‘Allow currency selection at checkout:’ is enabled – see **Chapter 7.3.1.4**) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]
This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.
- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]


This parameter allows you to instruct **CBSubs™** how to handle the case of basket currency not supported by payment organization. It is a drop-down field parameter accepting one of the following values:

- Hide this method if basket currency mismatches
This means that Gateway should not be proposed as a payment method if the currency is not supported
- Ask if user wants to convert basket currency to pay
This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that the Gateway supports. With this value selected an extra text parameter will be presented 'Confirmation text to ask user for conversion:'

The 'Presentation on this site' framed area contains the following parameter:

- **Name of payment provider to show to your customers:** [initial value: QuickPay, our PCI-certified payment service provider]
This text field parameter is used to specify the name of the payment provider to show to your customers in the title of the payment button and in feedbacks.

The 'Presentation on this site' framed area will show the following additional framed area 'Single payments at a time' when the gateway is enabled (set to enable single payments) that contains the parameters:

- **Payment Button:** [initial value: ]
This radio field parameter selector is used to specify which icon **CBSubs™** is to display when a single payment at a time case appears using the QuickPay gateway.
- **Custom Payment Button Text or Image:** [initial value: empty]
This text field parameter is used to specify the text or the URL of an image that is to be used for the payment button.
- **Payment Button hover (title) text:** [initial value: Pay safely with %s]
Use this text field parameter to specify the title text to be shown when mouse pointer hovers over the payment button. The %s is replaced with the name of the payment method chosen (in this case QuickPay)

Finally, a 'General settings' frame is displayed with the following 2 parameters:

- **CSS class (e.g., 'cbreg_green cbreg_admin_green'):** [initial value: empty]
The CSS class that should be used for this gateway. See **Figure 111** to see the results of this parameter.
- **Owner id (only supported: 0 for now):** [initial value: 0]

7.4.10.1 Quickpay Account Guidelines

The **Quickpay** account opening and configuration process is quite involved and you should contact the **Quickpay** helpdesk for assistance.

For reference purposes we have provided three screenshots of relevant QuickPay administration pages that may assist you to properly configure your **CBSubs™** QuickPay payment gateway. These are illustrated in **Figure 117**, **Figure 118** and **Figure 119**.

The screenshot displays the Joomla! administrator interface for the 'Merchant' settings. The left sidebar shows the 'Settings' menu item highlighted. The main content area is divided into two sections: 'Basic information' and 'Settings'. The 'Basic information' section contains the following fields: 'QuickpayId' (highlighted with a red box), 'Company name', 'Address', 'Zip code', 'City', 'Shop system' (a dropdown menu), 'Shop homepage', 'Country' (a dropdown menu), and 'Timezone'. The 'Settings' section contains a single field: 'Callback url' (highlighted with a red box). The right sidebar contains a 'Help' section with the title 'Merchant settings' and a 'Various explanations' section with the following bullet points: 'Quickpay Id - This your unique id that you are identified by when using Quickpay.', 'Shopsystem - Please specify the shop system you are using. If your shop is not based on a standard ecommerce system, please specify "Custombuild". If you are using a standard ecommerce system, that is not listed, please let us know.', 'Merchant shopurl - Please specify the www address of your website/shop. Eg. "http://www.ourshop.tld/"', 'Allowed API IP addresses - Enter the IP addresses that you wish allow access to API. Enter one IP address per line.', and 'Gateway mode - The Payment gateway can act in two different modes. Test mode is for test and development. Real money is never involved in this mode. Remember that it is also possible to set test/production mode per transaction. Please refer to our technical documentation to see howto.'

Figure 117: QuickPay Merchant Settings area

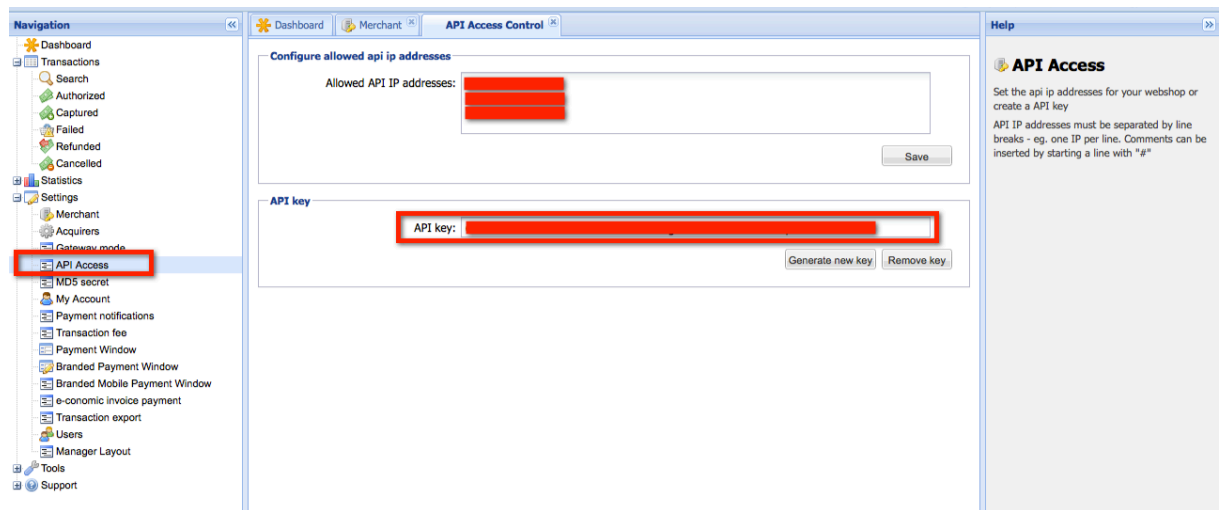


Figure 118: QuickPay API Access Settings area

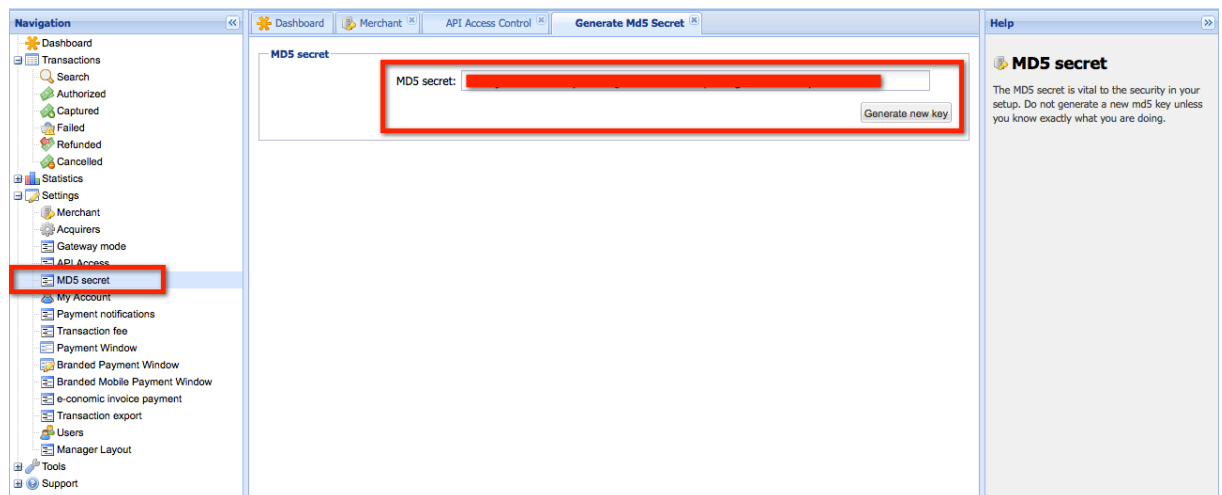


Figure 119: QuickPay MD5 Settings area

7.4.11 Creating and Configuring a Moneris eSELECTplus Payment Gateway

Moneris eSELECTplus (www.eselectplus.ca) is an online payment processing organization that is supported in **CBSubs™** by downloading and installing the **Moneris eSELECTplus** payment integration plugin as described in **Chapter 6.27**.

The **Moneris eSELECTplus** Payment Gateway configuration setup has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: Moneris eSELECTplus]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'Moneris eSELECTplus' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My Moneris Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our Moneris eSELECTplus Gateway setup screen displays a 'Moneris eSELECTplus Payment Service Provider (PSP) E-Payments' framed area that contains extra parameter settings and additional sub-framed areas.

- **Enable Moneris eSELECTplus E-payments:** [initial value: 'No']
This drop-down select parameter is used to disable or enable (for specific payment types) the Moneris eSELECTplus payment gateway. The following options are available:
 - 'No'

- 'Enable single payments'

- **Moneris eSELECTplus server:** [initial value: 'Normal Moneris eSELECTplus server']

This drop-down select parameter field accepts the following options:

- 'Normal Moneris eSELECTplus server'
- 'Moneris eSELECTplus Development server'
- 'Other server compatible with Moneris eSELECTplus'

- **Server submission URL:** [initial value: empty]

This text field parameter will appear only if the 'Moneris eSELECTplus server' parameter is set to 'Other server compatible with Moneris eSELECTplus' and should be populated with the URL of the compatible service that relates to the www3.moneris.com/HPPDP/index.php URL.

- **Moneris eSELECTplus PS Store ID:** [initial value: empty]

This text field parameter should be populated with your Moneris account ps store id as it appears at Moneris eSELECTplus → ADMIN → hosted config → Generate a Version3 configuration → ps_store_id

- **Moneris eSELECTplus HPP Key:** [initial value: empty]

This text field parameter should be populated with your Moneris eSELECTplus HPP Key as it appears at Moneris eSELECTplus → ADMIN → hosted config → Generate a Version3 configuration → hpp_key

- **Moneris eSELECTplus Store Login ID:** [initial value: empty]

This text field parameter should be populated with the Moneris eSELECTplus account store id used for login at Moneris eSELECTplus site

- **Moneris eSELECTplus API Token:** [initial value: empty]

This text field parameter should be populated with your Moneris eSELECTplus API token as it appears at Moneris eSELECTplus → ADMIN → store settings → API Token

- **Moneris eSELECTplus Order ID Prefix:** [initial value: empty]
An optional alphanumeric string that is prepended to the basketid in order to generate the ordered that is sent to Moneris eSELECTplus.
- **URL to set into Moneris eSELECTplus admin area in ADMIN – hosted config – Generate a Version3 Configuration – “Approved URL”:** [initial value: generated]
This URL is calculated by **CBSubs™** after Save or Apply icon is clicked and should be copied over to the Moneris eSELECTplus → ADMIN → hosted config → Generate a Version3 Configuration → “Approved URL” area on Moneris site.
- **URL to set into Moneris eSELECTplus admin area in ADMIN – hosted config – Generate a Version3 Configuration – “Declined URL”:** [initial value: generated]
This URL is calculated by **CBSubs™** after Save or Apply icon is clicked and should be copied over to the Moneris eSELECTplus → ADMIN → hosted config → Generate a Version3 Configuration → “Declined URL” area on Moneris site.
- **URL to set into Moneris eSELECTplus admin area in ADMIN – hosted config – Generate a Version3 Configuration – Response/Receipt Data - “Async Response URL” and in ADMIN – hosted config – Generate a Version3 Configuration – Security Features - “Response URL” :** [initial value: generated]
This URL is calculated by **CBSubs™** after Save or Apply icon is clicked and should be copied over to the relevant Moneris eSELECTplus areas.
- **URL to set into Moneris eSELECTplus admin area in ADMIN – hosted config – Generate a Version3 Configuration – Appearance Configuration – “Cancel Button URL”:** [initial value: generated]
This URL is calculated by **CBSubs™** after Save or Apply icon is clicked and should be copied over to the Moneris eSELECTplus → ADMIN → hosted config → Generate a Version3 Configuration → Appearance Configuration →

“Cancel Button URL” area on Moneris site.

- **Moneris eSELECTplus user interface language:** [initial value: English]

This drop-down select field parameter can be set to English or French.

The ‘Anti-Fraud-helping hidden fields’ framed area contains the following parameters:

- **Send customers email address:** [initial value: ‘Yes’]

A Billing framed area with the following two parameters:

- **Send customers invoice address:** [initial value: ‘Yes’]
- **Send customers phone number:** [initial value: ‘Yes’]

A Shipping framed area with the following two parameters:

- **Send customers invoice address:** [initial value: ‘Yes’]
- **Send customers phone number:** [initial value: ‘Yes’]

After the ‘Anti-Fraud-helping hidden fields’ framed area the following parameter is solicited:

- **Notification host (leave blank):** [initial value: empty]

The Moneris eSELECTplus payment gateway setup continues with a ‘Currencies accepted’ framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and ‘Allow currency selection at checkout:’ is enabled – see **Chapter 7.3.1.4**) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]

This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.

- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]

This parameter allows you to instruct **CBSubs™** how to handle the case of

basket currency not supported by payment organization. It is a drop-down field parameter accepting one of the following values:


- Hide this method if basket currency mismatches
This means that Moneris eSELECTplus should not be proposed as a payment method if the currency is not supported
- Ask if user wants to convert basket currency to pay
This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that Moneris eSELECTplus supports. With this value selected an extra text parameter will be presented
'Confirmation text to ask user for conversion:'

The 'Presentation on this site' framed area contains the following parameter:

- **Name of payment provider to show to your customers:** [initial value: Moneris eSELECTplus, our PCI-certified payment service provider]
This text field parameter is used to specify the name of the payment provider to show to your customers in the title of the payment button and in feedbacks.

The 'Presentation on this site' framed area will show the following additional framed area 'Single payments at a time' when the gateway is enabled (set to enable single payments) that contains the parameters:



- **Payment Button:** [initial value: ]
This radio field parameter selector is used to specify which icon **CBSubs™** is to display when a single payment at a time case appears using the Moneris eSELECTplus gateway.
- **Custom Payment Button Text or Image:** [initial value: empty]
This text field parameter is used to specify the text or the URL of an image that is to be used for the payment button.
- **Payment Button hover (title) text:** [initial value: Pay safely with %s]
Use this text field parameter to specify the title text to be shown when mouse

pointer hovers over the payment button. The %s is replaced with the name of the payment method chosen (in this case Moneris eSELECTplus)

Finally, a 'General settings' frame is displayed with the following 2 parameters:

- **CSS class (e.g., 'cbreg_green cbreg_admin_green'):** [initial value: empty]
The CSS class that should be used for this gateway. See **Figure 111** to see the results of this parameter.
- **Owner id (only supported: 0 for now):** [initial value: 0]

7.4.11.1 Moneris eSELECTplus Account Guidelines

The **Moneris eSELECTplus** account opening and configuration process is quite involved and you should contact the **Moneris eSELECTplus** helpdesk for assistance.

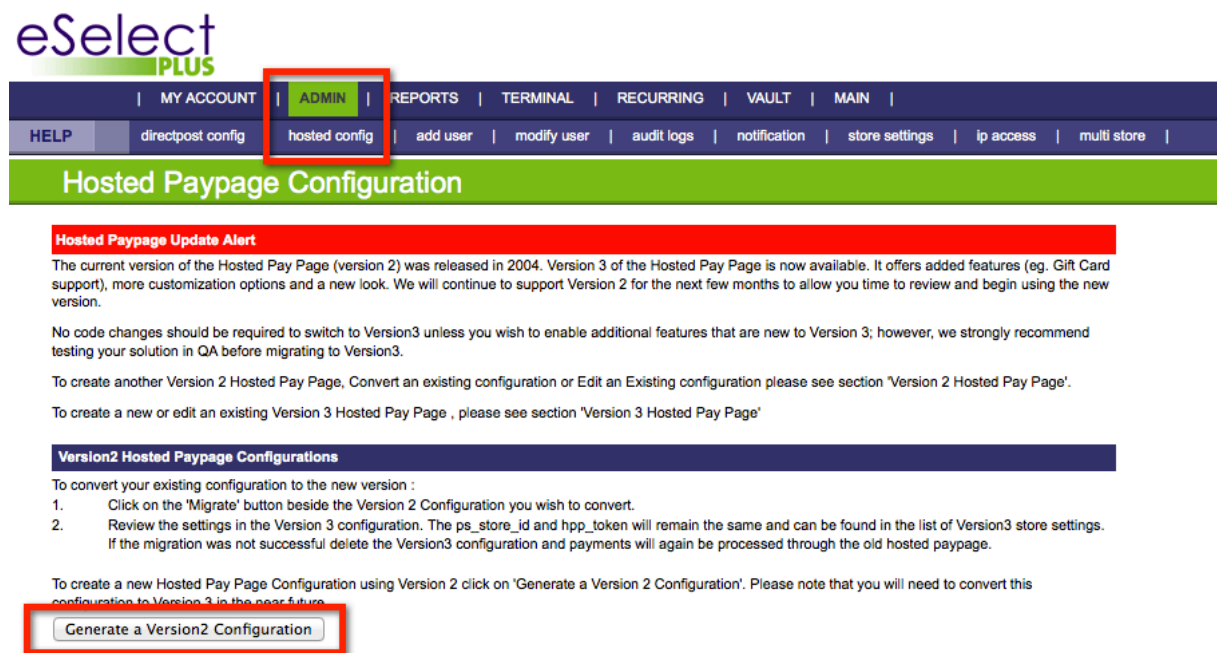


Figure 120: Moneris eSELECTplus hosted config area

eSelect PLUS

MY ACCOUNT | **ADMIN** | REPORTS | TERMINAL | RECURRING | VAULT | MAIN

HELP | directpost config | hosted config | add user | modify user | audit logs | notification | store settings | ip access | multi store

Hosted Paypage Configuration

ps_store_id: R3FJG5ore5
hpp_key: hp18NMNF7SY6

Generate new hpp_key

Basic Configuration

Transaction Type

Please specify what type of transaction you would like the Hosted Paypage solution to perform.

Transaction Type: ☒ Purchase ☐ Preauth (Requires a Capture to settle funds.)

Response Method

Please specify how the transaction response should be handled.

Response Method: ☒ Sent to your server as a POST ☐ Sent to your server as a GET ☐ eSelect plus creates a receipt on your behalf.

Approved URL:
Declined URL:
URLs must start with http or https and must be a registered domain. IP addresses are not supported.

Save Changes

Paypage Appearance

Specify what will be displayed on the Hosted Paypage.

Configure Appearance

Response Data

Specify what additional fields will be returned in the transaction response.

Configure Response Fields

Security Features

Security features of the Hosted Paypage include a referring URL check as well as a transaction verification scheme. To configure these features please click on 'Configure Security'.

Configure Security

Email Receipts

Configure the optional email receipts.

Configure Email Receipts

Figure 121: Moneris eSELECTplus hosted config settings

7.4.12 Creating and Configuring a Worldpay Payment Gateway

Worldpay (worldpay.com) is an online payment processing organization that is supported in **CBSubs™** by downloading and installing the **Worldpay** payment integration plugin as described in **Chapter 6.28**.

The **Worldpay** Payment Gateway configuration setup has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: WorldPay]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'WorldPay' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My WorldPay'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our WorldPay Gateway setup screen displays a 'WorldPay Payment Service Provider (PSP) E-Payments' framed area that contains extra parameter settings and additional sub-framed areas.

- **Enable WorldPay E-payments:** [initial value: 'No']
This drop-down select parameter is used to disable or enable (for specific payment types) the WorldPay payment gateway. The following options are available:
 - 'No'
 - 'Enable single payments'
 - 'Enable auto-recurring payments'

- 'Enable single and auto-recurring payments at user's choice'
- **WorldPay server:** [initial value: 'Normal WorldPay server']

This drop-down select parameter field accepts the following options:

 - 'Normal WorldPay server'
 - 'WorldPay Test server'
 - 'Other server compatible with WorldPay'
- **Server submission URL:** [initial value: empty]

This text field parameter will appear only if the 'WorldPay server' parameter is set to 'Other server compatible with WorldPay' and should be populated with the URL of the compatible service that relates to the secure.worldpay.com/wcc/purchase URL.
- **WorldPay Installation ID:** [initial value: empty]

This text field parameter should be populated with your WorldPay installation id as it appears at WorldPay → Installations → Integration setup → PRODUCTION → "Installation ID". Please see **Figure 122** and **Figure 123** for guidance.
- **WorldPay Servlet Password:** [initial value: empty]

This text field parameter should be populated with your WorldPay servlet password as it populated by you at WorldPay → Installations → Integration setup → PRODUCTION → "Info servlet passwords". Please see **Figure 122** and **Figure 123** for guidance.
- **WorldPay Payment Response Password:** [initial value: empty]

This text field parameter should be populated with your WorldPay payment response password as it populated by you at WorldPay → Installations → Integration setup → PRODUCTION → "Payment response password". Please see **Figure 122** and **Figure 123** for guidance.
- **WorldPay MD5 secret:** [initial value: empty]

This text field parameter should be populated with your WorldPay payment

response password as it populated by you at WorldPay → Installations → Integration setup → PRODUCTION → “MD5 secret for transactions”. Please see **Figure 122** and **Figure 123** for guidance.

- **URL to set into WorldPay admin area in Installations – Integration Setup : PRODUCTION – “Payment Response URL”:** [initial value: generated]

This URL is calculated by **CBSubs™** after Save or Apply icon is clicked and should be copied over to the WorldPay → Installations → Integration Setup: PRODUCTION → “Payment Response URL” area on WorldPay site. Please see **Figure 122** and **Figure 123** for guidance.

- **WorldPay user interface language:** [initial value: English]

This drop-down select field parameter can be set to WorldPay supported languages.

The ‘Anti-Fraud-helping hidden fields’ framed area contains the following parameters:

- **Send customers email address:** [initial value: ‘Yes’]

A Billing framed area with the following parameter:

- **Send customers billing invoicing address:** [initial value: ‘Yes’]

A Shipping framed area with the following two parameters:

- **Send customers shipping invoice address:** [initial value: ‘Yes’]

One extra anti-fraud parameter follows these frames:

- **Send customers phone number:** [initial value: ‘Yes’]

After the ‘Anti-Fraud-helping hidden fields’ framed area the following parameter is solicited:

- **Notification host (leave blank):** [initial value: empty]

The WorldPay payment gateway setup continues with a 'Currencies accepted' framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and 'Allow currency selection at checkout:' is enabled – see **Chapter 7.3.1.4**) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]
This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.

- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]
This parameter allows you to instruct **CBSubs™** how to handle the case of basket currency not supported by payment organization. It is a drop-down field parameter accepting one of the following values:
 - Hide this method if basket currency mismatches
This means that WorldPay should not be proposed as a payment method if the currency is not supported

 - Ask if user wants to convert basket currency to pay
This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that WorldPay supports. With this value selected an extra text parameter will be presented 'Confirmation text to ask user for conversion:'

The 'Presentation on this site' framed area contains the following parameter:


- **Name of payment provider to show to your customers:** [initial value: WorldPay, our PCI-certified payment service provider]
This text field parameter is used to specify the name of the payment provider to show to your customers in the title of the payment button and in feedbacks.

The 'Presentation on this site' framed area will show the following additional framed areas 'Single payments at a time' and 'Recurring subscribed payments multiple

times' when the gateway is enabled (set to enable single payments or relevant auto-recurring setting).


The 'Single payments at a time' framed area follows and contains the parameters:




- **Payment Button:** [initial value: ]
This radio field parameter selector is used to specify which icon **CBSubs™** is to display when a single payment at a time case appears using the WorldPay gateway.
- **Custom Payment Button Text or Image:** [initial value: empty]
This text field parameter is used to specify the text or the URL of an image that is to be used for the payment button.
- **Payment Button hover (title) text:** [initial value: Pay safely with %s]
Use this text field parameter to specify the title text to be shown when mouse pointer hovers over the payment button.

The 'Recurring subscribed payments multiple times' framed area follows and contains the parameters:



- **Payment Button:** [initial value: ]
This radio field parameter selector is used to specify which icon button **CBSubs™** is to display when an auto-recurring subscription payment case appears using the WorldPay gateway.
- **Custom Payment Button Text or Image:** [initial value: empty]
This text field parameter is used to specify the text or the URL of an image that is to be used for the payment button.
- **Payment Button hover (title) text:** [initial value: Pay safely with %s]
Use this text field parameter to specify the title text to be shown when mouse pointer hovers over the payment button.

- **Payment Button:** [initial value: ]
This radio field parameter selector is used to specify which icon **CBSubs™** is to display when a single payment at a time case appears using the WorldPay gateway.
- **Custom Payment Button Text or Image:** [initial value: empty]
This text field parameter is used to specify the text or the URL of an image that is to be used for the payment button.
- **Payment Button hover (title) text:** [initial value: Pay safely with %s]
Use this text field parameter to specify the title text to be shown when mouse pointer hovers over the payment button. The %s is replaced with the name of the payment method chosen (in this case WorldPay)

The 'Custom presentation of payment page' frame contains the following 2 parameters:

- **Custom HTML:** [initial value: [WORLDPAY_BANNER]
[LINK_BACK_TO_SITE]]
This HTML field parameter is used to specify the payment page that should be presented.
Following substitutions can be used in Custom HTML: [INVOICE_ID], [INVOICE_NO], [ITEMS_NAME], [ITEMS_NUMBERS], [PAYMENT_STATUS], [PAYMENT_METHOD], [DATE_ORDERED], [DATE_TIME_ORDERED], [DATE_PAID], [TRANSACTION_ID], [TRANSACTION_TYPE], [CURRENCY], [TOTAL_PRICE], [TAX_AMOUNT], [ADDRESS_FIRST_NAME], [ADDRESS_LAST_NAME], [ADDRESS_COMPANY], [ADDRESS_STREET], [ADDRESS_CITY], [ADDRESS_STATE], [ADDRESS_ZIPCODE], [ADDRESS_COUNTRY], [ADDRESS_PHONE], [PAYER_EMAIL], [ADDRESS_VAT_NUMBER], [INVOICE_CONTENT_HTML], [INVOICE_ITEMS_HTML], [BASKET_CONTENT_HTML], and [WORLDPAY_BANNER]

- **Custom CSS:** [initial value: .paymentPageContainer,.worldPayBanner table{text-align:center}.worldPayBanner .banner,.worldPayBanner .bannercontainer{width:100%}.returnToSite{margin-top:10px}]

The 'Access settings' frame contains the 'Visible for Access Level:' drop down parameter that can be set to Public, Registered, Special or other ACL groups you might have created in Joomla 2.5.

Finally, a 'General settings' frame is displayed with the following 2 parameters:

- **CSS class (e.g., 'cbreg_green cbreg_admin_green'):** [initial value: empty]
The CSS class that should be used for this gateway. See **Figure 111** to see the results of this parameter.
- **Owner id (only supported: 0 for now):** [initial value: 0]

7.4.12.1 Worldpay Account Guidelines

The **Worldpay** account opening and configuration process is quite involved and you should contact the **Worldpay** helpdesk for assistance.

For reference purposes we have provided two screenshots of relevant WorldPay administration pages that may assist you to properly configure your **CBSubs™** WorldPay payment gateway. These are illustrated in Figure 122 and Figure 123.

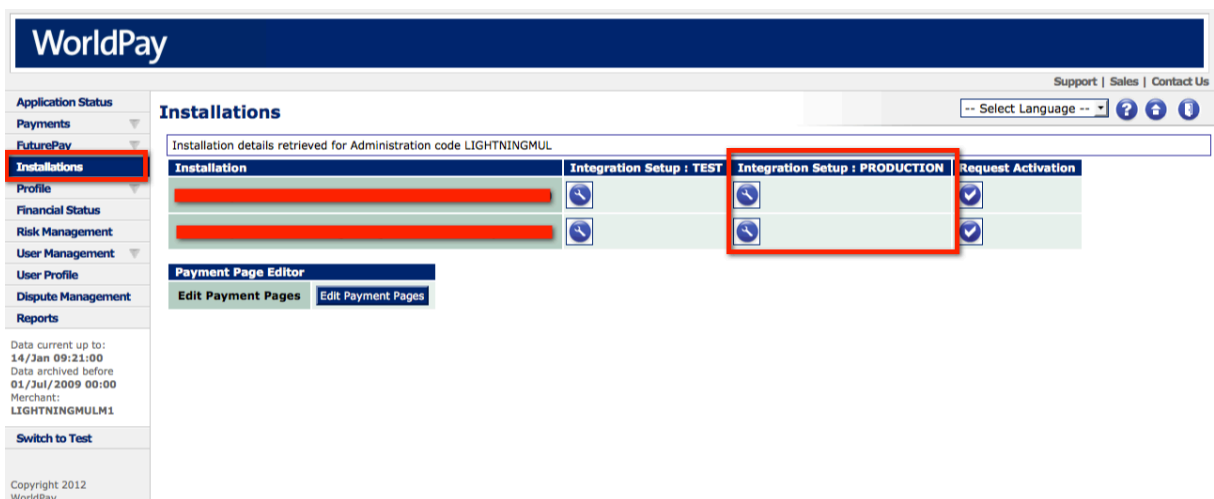


Figure 122: WorldPay Administration area

WorldPay

Support | Sales | Contact Us

Application Status

Payments

FuturePay

Installations

Profile

Financial Status

Risk Management

User Management

User Profile

Dispute Management

Reports

Data current up to:
14/Jan 09:24:00
Data archived before
01/Jul/2009 00:00
Merchant:
LIGHTNINGMULM1

Switch to Test

Copyright 2012
WorldPay

Installation Administration

-- Select Language -- ?

Integration Setup : **PRODUCTION**

To other actions

Installation ID:					
Administration Code:					
Company Name:					
Environment			PRODUCTION		
Description					
Customer description (for payment pages)					
Integration type			Select Junior(60)		
Use 3D Secure Authentication?			true		
Use MasterCard SPA?			true		
Store-builder used			Default		
store-builder: if other - please specify			CB Paid Subscriptions		
Payment Response URL					
Payment Response enabled?			<input type="checkbox"/>		
Enable Recurring Payment Response			<input type="checkbox"/>		
Enable the Shopper Response			<input type="checkbox"/>		
Suspension of Payment Response			<input type="checkbox"/>		
Payment Response failure count			0		
Payment Response failure email address					
Attach HTTP(s) Payment Message to the failure email?			<input checked="" type="checkbox"/>		
Merchant receipt email address (if set, overrides value at Merchant Code level)					
Info servlet password				Confirm:	Use default: <input type="checkbox"/>
Payment Response password				Confirm:	Use default: <input type="checkbox"/>
MD5 secret for transactions				Confirm:	Use default: <input type="checkbox"/>
SignatureFields					

Update Installation [Save Changes](#)

Figure 123: WorldPay Installation Administration Production area

7.4.13 Creating and Configuring a CIC Credit Mutuel Payment Gateway

CIC Credit Mutuel (<https://www.cmcicpaiement.fr/fr/index.html>) is an online payment processing organization that is supported in **CBSubs™** by downloading and installing the **CIC Credit Mutuel** payment integration plugin as described in **Chapter 6.29**.

The **CIC Credit Mutuel** Payment Gateway configuration setup has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: CIC Credit Mutuel]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'CIC Credit Mutuel' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My CIC Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our CIC Credit Mutuel Gateway setup screen displays a 'CIC Credit Mutuel Payment Service Provider (PSP) E-Payments' framed area that contains extra parameter settings and additional sub-framed areas.

- **Enable CIC Credit Mutuel E-payments:** [initial value: 'No']
This drop-down select parameter is used to disable or enable (for specific payment types) the CIC Credit Mutuel payment gateway. The following options are available:
 - 'No'

- 'Enable single payments'
- **CIC Credit Mutuel server:** [initial value: 'Normal CIC Credit Mutuel server']

This drop-down select parameter field accepts the following options:

 - 'Normal CIC Credit Mutuel server'
 - 'CIC Credit Mutuel test server'
 - 'Other server compatible with CIC Credit Mutuel'
- **Server submission URL:** [initial value: empty]

This text field parameter will appear only if the 'CIC Credit Mutuel server' parameter is set to 'Other server compatible with CIC Credit Mutuel' and should be populated with the URL of the compatible service that relates to the paiement.creditmutuel.fr/paiement.cgi URL.
- **CIC Credit Mutuel TPE/Virtual EPT Number:** [initial value: empty]

This text field parameter should be populated with your CIC Credit Mutuel tpe also known as virtual ept number provided by CIC Credit Mutual.
- **CIC Credit Mutuel Societe/Site Code:** [initial value: empty]

This text field parameter should be populated with your CIC Credit Mutuel Societe also known as Site Code provided by CIC Credit Mutual.
- **CIC Credit Mutuel HMAC Secret:** [initial value: empty]

This text field parameter should be populated with your CIC Credit Mutuel hash_mac secret provided by CIC Credit Mutual
- **CIC Credit Mutuel HMAC Encryption:** [initial value: SHA1]

This drop-down field parameter text field parameter can be set to one of the following values:

 - SHA1
 - MD5
- **URL to be provided to CIC Credit Mutuel for payment confirmation (IPNs):** [initial value: generated]

This URL is calculated by **CBSubs™** after Save or Apply icon is clicked and should be copied over to the CIC Credit Mutuel site

- **CIC Credit Mutuel user interface language:** [initial value: English]
This drop-down select field parameter can be set to gateway supported languages.


The CIC Credit Mutuel payment gateway setup continues with a 'Currencies accepted' framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and 'Allow currency selection at checkout:' is enabled – see **Chapter 7.3.1.4**) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]
This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.
- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]
This parameter allows you to instruct **CBSubs™** how to handle the case of basket currency not supported by payment organization. It is a drop-down field parameter accepting one of the following values:
 - Hide this method if basket currency mismatches
This means that CIC Credit Mutuel should not be proposed as a payment method if the currency is not supported
 - Ask if user wants to convert basket currency to pay
This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that CIC Credit Mutuel supports. With this value selected an extra text parameter will be presented
'Confirmation text to ask user for conversion:'

The 'Presentation on this site' framed area contains the following parameter:

- **Name of payment provider to show to your customers:** [initial value: CIC Credit Mutuel, our PCI-certified payment service provider]
This text field parameter is used to specify the name of the payment provider to show to your customers in the title of the payment button and in feedbacks.

The 'Presentation on this site' framed area will show the following additional framed area 'Single payments at a time' when the gateway is enabled (set to enable single payments) that contains the parameters:

- **Payment Button:** [initial value: 
This radio field parameter selector is used to specify which icon **CBSubs™** is to display when a single payment at a time case appears using the CIC Credit Mutuel gateway.
- **Custom Payment Button Text or Image:** [initial value: empty]
This text field parameter is used to specify the text or the URL of an image that is to be used for the payment button.
- **Payment Button hover (title) text:** [initial value: Pay safely with %s]
Use this text field parameter to specify the title text to be shown when mouse pointer hovers over the payment button. The %s is replaced with the name of the payment method chosen (in this case CIC Credit Mutuel)

Finally, a 'General settings' frame is displayed with the following 2 parameters:

- **CSS class (e.g., 'cbreg_green cbreg_admin_green'):** [initial value: empty]
The CSS class that should be used for this gateway. See **Figure 111** to see the results of this parameter.
- **Owner id (only supported: 0 for now):** [initial value: 0]

7.4.13.1 CIC Credit Mutuel Account Guidelines

The **CIC Credit Mutuel** account opening and configuration process is quite involved and you should contact the **CIC Credit Mutuel** helpdesk for assistance.

7.4.14 **Creating and Configuring a TeleMoney EasyPay Payment Gateway**

TeleMoney EasyPay (www.telemoneyworld.com) is an online payment processing organization that is supported in **CBSubs™** by downloading and installing the **TeleMoney EasyPay** payment integration plugin as described in **Chapter 6.30**.

The **TeleMoney EasyPay** Payment Gateway configuration setup has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: Telemoney Easypay]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'Telemoney Easypay' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My Telemoney Easypay Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our Telemoney Easypay Gateway setup screen displays a 'Telemoney Easypay Payment Service Provider (PSP) E-Payments' framed area that contains extra parameter settings and additional sub-framed areas.

- **Enable Telemoney Easypay E-payments:** [initial value: 'No']
This drop-down select parameter is used to disable or enable (for specific payment types) the Telemoney Easypay payment gateway. The following options are available:
 - 'No'

- 'Enable single payments'
- **Telemoney Easypay server:** [initial value: 'Normal Telemoney Easypay server']

This drop-down select parameter field accepts the following options:

- 'Normal Telemoney Easypay server'
 - 'Telemoney Easypay test server'
 - 'Other server compatible with Telemoney Easypay'
- **Server submission URL:** [initial value: empty]

This text field parameter will appear only if the 'Telemoney Easypay server' parameter is set to 'Other server compatible with Telemoney Easypay' and should be populated with the URL of the compatible service that relates to the `securepayments.telemoneyworld.com/easypay2saw/paymentpage.do` URL.
- **Telemoney EasyPay Merchant ID:** [initial value: empty]

This text field parameter should be populated with the Telemoney EasyPay merchant id taken from your payment organization account area.
- **Notification host (leave blank):** [initial value: empty]

Read tooltip explanation for up-to-date information about this setting

The 'Enhanced security parameters' framed area' that follows has these parameters:

- **Telemoney notification server IP addresses (for notification origin check):** [initial value: 202.79.222.66,203.117.87.82]

This text field parameter initially contains a comma separated IP address list of Telemoney EasyPay server locations. These IP addresses need to be verified with the payment organization (in case they change) as they are used to enhance security.
- **Include status URL in payment forms sent to Telemoney EasyPay:** [initial value: 'Include in form (needed unless you agree for fixed status_url with

Telemoney EasyPay)']

This setting can be set to one of the following:

- Include in form (needed unless you agree for fixed status_url with Telemoney EasyPay)
- Do not include (better security, only if Telemoney EasyPay has is set for your merchant account)

This option should only be selected if you have contacted the Telemoney EasyPay helpdesk and asked them to manually set your merchant account to support this setting. If this option is selected a new parameter will appear for you to populate your shared secret.

- **Shared secret: Set a random string (0-9,a-z) then save before copying URL below for Telemoney EasyPay:** [initial value: empty]

This text field parameter is used to store a random secret string that will be used in the Status URL that is generated by **CBSubs™** (see next calculated parameter). This Shared secret needs to be communicated to your TeleMoney EasyPay helpdesk as they need to manually configure it on their end.

- **Status URL that you give to Telemoney EasyPay to enhance your security (ignore this when status URL is not set to be included in payment form and shared secret above is not set):** [initial value: calculated]

This URL will be calculated by CBSubs™ taking into account your Shared secret parameter. The URL should be sent to your Telemoney EasyPay helpdesk as they need to manually configure things on their end for this feature on your account.

The Telemoney EasyPay payment gateway setup continues with a 'Currencies accepted' framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and 'Allow currency selection at checkout:' is enabled – see **Chapter 7.3.1.4**) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]

This multi-select field parameter is used to select the currencies you are

allowing to be selected for order display and for payment at checkout.

- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]

This parameter allows you to instruct **CBSubs™** how to handle the case of basket currency not supported by payment organization. It is a drop-down field parameter accepting one of the following values:

- Hide this method if basket currency mismatches

This means that Telemoney EasyPay should not be proposed as a payment method if the currency is not supported

- Ask if user wants to convert basket currency to pay

This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that Telemoney EasyPay supports.

With this value selected an extra text parameter will be presented

‘Confirmation text to ask user for conversion:’

The ‘Presentation on this site’ framed area will show the following additional framed area ‘Single payments at a time’ when the gateway is enabled (set to enable single payments) that contains the parameters:

- **Payment Button:** [initial value: 

This radio field parameter selector is used to specify which icon **CBSubs™** is to display when a single payment at a time case appears using the Telemoney EasyPay gateway.

- **Custom Payment Button Text or Image:** [initial value: empty]

This text field parameter is used to specify the text or the URL of an image that is to be used for the payment button.

- **Payment Button hover (title) text:** [initial value: Pay safely with %s]

Use this text field parameter to specify the title text to be shown when mouse pointer hovers over the payment button. The %s is replaced with the name of the payment method chosen (in this case Telemoney EasyPay)

Finally, a 'General settings' frame is displayed with the following 2 parameters:

- **CSS class (e.g., 'cbreg_green cbreg_admin_green'):** [initial value: empty]
The CSS class that should be used for this gateway. See **Figure 111** to see the results of this parameter.
- **Owner id (only supported: 0 for now):** [initial value: 0]

7.4.14.1 TeleMoney EasyPay Account Guidelines

The **TeleMoney EasyPay** account opening and configuration process is quite involved and you should contact the **TeleMoney EasyPay** helpdesk for assistance.

The screenshot displays the 'User Profile' page of the TeleMoney EasyPay system. The page has a navigation bar with links: Main Menu, Edit Profile (active), Transactions →, Common Settings, and Logout. Below the navigation bar, the title 'User Profile' is shown in green, followed by the instruction 'Please update your information using the form below.' The form contains several input fields: 'Merchant Id' (highlighted with a red box), 'Username *', 'Password *', 'Confirm Password *', 'First Name', 'Last Name', 'Email', and 'Contact Number'. The 'Password' and 'Confirm Password' fields are masked with dots. At the bottom of the form are 'Save' and 'Cancel' buttons. The footer of the page includes 'Version 2.0.0 | Logged in as: [redacted]', the TeleMoney logo, and the copyright notice '© 2012 Systems@Work Pte Ltd'.

Figure 124: Telemoney EasyPay merchand id

7.4.15 Creating and Configuring a Eway Payment Gateway

Eway (www.eway.com.au) is an online payment processing organization that is supported in **CBSubs™** by downloading and installing the **Eway** payment integration plugin as described in **Chapter 6.31**.

The **Eway** Payment Gateway configuration setup has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: eWAY]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'Eway' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My Eway Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created.

After the (above) 3 parameters, our Eway Gateway setup screen displays a 'Eway Payment Service Provider (PSP) E-Payments' framed area that contains extra parameter settings and additional sub-framed areas.

- **Enable Eway E-payments:** [initial value: 'No']
This drop-down select parameter is used to disable or enable (for specific payment types) the Eway payment gateway. The following options are available:
 - 'No'
 - 'Enable single payments'

- **Eway server:** [initial value: 'Normal Eway server']

This drop-down select parameter field accepts the following options:

- 'Normal Eway server'
- 'Eway test server'
- 'Other server compatible with Eway'

- **Server submission URL:** [initial value: empty]

This text field parameter will appear only if the 'Eway' parameter is set to 'Other server compatible with Eway' and should be populated with the URL of the compatible service that relates to the au.ewaygateway.com URL.

- **eWAY Customer ID:** [initial value: empty]

This text field parameter should be populated with your eWAY customer ID number provided by the payment organization.

- **eWAY Customer Username:** [initial value: empty]

This text field parameter should be populated with your eWAY customer username provided by the payment organization.

- **eWAY user interface language:** [initial value: English]

This drop-down single select field parameter should be set to the language that should be used by the eWAY organization when presenting information to your CBSubs™ customers. Currently, the following language choices are available:

- French
- English
- German
- Spanish
- Dutch

The 'Anti-Fraud-helping hidden fields' framed area contains the following parameter settings:

- **Send customers email address:** [initial value: Yes]
This Yes/No selectable drop-down field is used to instruct CBSubs™ to send the user specified email address as a hidden form field as an anti-fraud measure to be used by the payment organization.
- **Send customers invoicing address:** [initial value: Yes]
This Yes/No selectable drop-down field is used to instruct CBSubs™ to send the user specified invoicing address as a hidden form field as an anti-fraud measure to be used by the payment organization.
- **Send customers phone number:** [initial value: Yes]
This Yes/No selectable drop-down field is used to instruct CBSubs™ to send the user specified phone number as a hidden form field as an anti-fraud measure to be used by the payment organization.

The Eway payment gateway setup continues with a 'Currencies accepted' framed area (only if the General settings icon area Global tab has been configured for Multi-currency mode and 'Allow currency selection at checkout:' is enabled – see **Chapter 7.3.1.4**) that contains the following parameters:

- **Accepted Currencies for payment:** [initial value: - All currencies (...)]
This multi-select field parameter is used to select the currencies you are allowing to be selected for order display and for payment at checkout.
- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]
This parameter allows you to instruct **CBSubs™** how to handle the case of basket currency not supported by payment organization. It is a drop-down field parameter accepting one of the following values:
 - Hide this method if basket currency mismatches
This means that Eway should not be proposed as a payment method if

the currency is not supported

- Ask if user wants to convert basket currency to pay

This setting will instruct **CBSubs™** to ask the user if currency should be converted to some other currency that Eway supports. With this value selected an extra text parameter will be presented 'Confirmation text to ask user for conversion:'

The 'Presentation on this site' framed area will show the following parameter:

- **Name of payment provide to show to your customers:** [initial value: eWAY, our PCI-certified payment server provider]

This text field parameter is used to populate what payment provider name to show to your CBSubs™ customers.

The 'General settings' frame is displayed with the following 2 parameters:

- **CSS class (e.g., 'cbreg_green cbreg_admin_green'):** [initial value: empty]
The CSS class that should be used for this gateway. See **Figure 111** to see the results of this parameter.
- **Owner id (only supported: 0 for now):** [initial value: 0]

Finally, the 'Presentation at the Payment Server Provider' frame has the following parameters:

- **Page Title:** [initial value: empty]
The text that should be used in the payment provider page browser bar.
- **Page Title:** [initial value: empty]
The text that should be used in the payment provider page browser bar. See field tooltip for additional information.

- **Page Description:** [initial value: empty]
See field tooltip for additional information.
- **Page Footer:** [initial value: empty]
See field tooltip for additional information.
- **Page Banner:** [initial value: empty]
See field tooltip for additional information.
- **Company Name:** [initial value: empty]
See field tooltip for additional information.
- **Company Logo:** [initial value: empty]
See field tooltip for additional information.

7.4.15.1 Eway Account Guidelines

The **Eway** account opening and configuration process is quite involved and you should contact the **Eway** helpdesk for assistance.

7.4.16 Creating and Configuring a PayPal Pro Payment Gateway

PayPal Pro (www.paypal.com) is an online payment processing organization that is supported in **CBSubs™** by downloading and installing the **PayPal Pro** payment integration plugin as described in **Chapter 6.32**.

The **PayPal Pro** Payment Gateway configuration setup has the following parameters that must be populated:

- **Type of payment gateway:** [fixed value: Paypal Pro]
This is a read-only parameter that just presents the actual payment gateway type selected when creating this specific payment gateway (**Figure 63**). In this case it will contain the value 'Paypal Pro' and cannot be changed.
- **Name of gateway account:** [initial value: empty]
This text field parameter is used to name (give a title) to our payment gateway (language strings are supported). We can complete this parameter with something like 'My Paypal Pro Gateway'.
- **Ordering:** [initial value:]
This drop-down field parameter allows us to order this payment gateway with respect to other payment gateways created

After the (above) 3 parameters, our PayPal Pro Gateway setup screen displays a 'PayPal Pro Payment Service Provider (PSP) E-Payments' area with the following parameters:

- **Enable PayPal E-Payments:** [initial value: No]
This drop-down parameter permits us to specify the mode of operation our 'PayPal Pro' gateway should operate under. There are 4 permissible options:
 - No (default)
By default our 'PayPal Pro' gateway is not enabled – thus is off. If this setting is specified the gateway will not be presented as an option.

- Enable single payments
Use this setting to enable single PayPal Pro payments.
 - Enable recurring PayPal Pro subscriptions
Use this setting to enable recurring PayPal Pro subscriptions.
 - Enable single payments and recurring PayPal Pro subscriptions at user's choice
Use this setting to enable single PayPal Pro payments and allow the user to decide if he/she permits PayPal Pro recurring subscriptions.
- **PayPal Pro Server:** [initial value: Normal PayPal Pro server]
This parameter is populated via a drop-down mechanism permitting the following 2 options:
 - Normal PayPal Pro server
Use this option to configure your gateway for 'live' PayPal Pro accounts.
 - PayPal Pro Test server
Use this option to configure your gateway to work with the sandbox PayPal Pro server (not live accounts). This setting should really be used just for testing purposes in order to test the PayPal workflows without incurring real PayPal costs.
 - Other server compatible with Paypal Pro
Us this option to configure a payment gateway that is compatible with Paypal Pro and just needs server submission URL (new parameter is presented with this setting).

The 'PayPal API credentials' area contains the following parameters:

- **PayPal account API username:** [initial value: empty]
Populate this parameter with the Paypal API username. You get this you're your paypal account area by visiting: My account – Profile – My selling tools – API access – Request API credentials – Request API signature.
- **Paypal account API Password:** [initial value: empty]
You get this information from paypal pages (same as API username).

- **Paypal account API Signature:** [initial value: empty]
You get this information from paypal pages (same as API username).
- **URL to set into Paypal Pro admin area in Profile – Instant Payment Notification preferences – “Notification URL”:** [initial value: none]
This URL is populated after the first Save/Apply of your gateway. You need to copy this string and paste it in your Paypal Pro admin area.
- **Accept payment once:** [initial value: Payment is authorized and captured (means completed)]
This single select drop down parameter is used to specify when a payment is accepted based on the following available settings:
 - Payment is authorized and captured (means completed)
 - Even if payment is pending authorization, authorized or captured
- **Notification host (leave blank):** [initial value: empty]
This parameter in most cases should be left empty. See tooltip for usage instructions if you are running your website in a clustered server environment.

The ‘Currencies accepted’ area contains the following parameters:

- **Accepted Currencies for Payment:** [initial value: All currencies]
This parameter allows you to specify which currencies are presented and accepted during checkout with this payment gateway.
- **What to do if currency of basket is not accepted:** [initial value: Hide this method if basket currency mismatches]
This parameter accepts the following settings:
 - Hide this method if basket currency mismatches
 - Ask if user wants to convert basket currency to pay
(in this case a confirmation text to ask user for confirmation parameter will appear for completion)

The Presentation area has the following parameters:

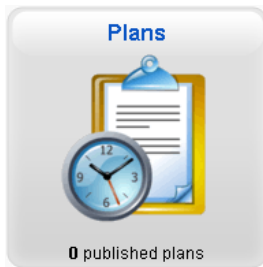
- **Description shown when radio is selected:** [initial value: empty]
This text area is used to add instructions or special conditions for this payment method.
- **Payment Button type:** [initial value: Credit-cards Logo images]
This is a radio field that accepts one of the following settings:
 - Credit-cards Logo images
 - Names pf credit cards text
- **Payment Choice type:** [initial value: Credit-cards Logo images]
This is a radio field that accepts one of the following settings:
 - Credit-cards Logo images
 - Names pf credit cards text
- **Accepted credit cards:** [initial value: non selected]
This multiselect checkbox field can be used to specify one or more of the following credit card types:
 - **Visa**
 - **Mastercard**
 - **American Express**
 - **Discover**

The Access settings area has a single Visible for Access Level: parameter that is used to specify which ACL group can see this payment method.

The General settings area has the following parameters:

- **CSS class (e.g. 'cbreg_green cbreg)admin_green'):**
- **Owner id (only supported: 0 for now):**

7.5 Plans icon area



The **Plans** icon area of the **CBSubs™** system is where the true planning and designing of the various subscription plans takes place. This area will be where all the specific functionality is configured to govern what is offered and how it is offered and for what price. There is a learning curve involved, so one must concentrate and understand the offered functionality and the options available. Once the options are understood and you become comfortable with this specific area, things will be much easier. The better you comprehend the features and parameters of this icon area, the easier it will be to design your commercial offerings and make them materialize as subscription plans.

We will initially go through each individual parameter setting of each tab and sub-tab of this **Plans** icon area. All options will be explored and when possible we will give additional information regarding the overall implications that a specific setting or combination of settings might cause. There will be a separate chapter dedicated to mapping various 'use case' scenarios into specific 'Plans' and 'Plan hierarchies'. But first we must learn the basics – sorry, there is no easy way.

The first decision that must be made when creating a new 'CB Paid Subscriptions' Plan is if the plan is to be a user subscription type plan, a merchandise type plan or a donation type plan. This is illustrated in **Figure 125**.

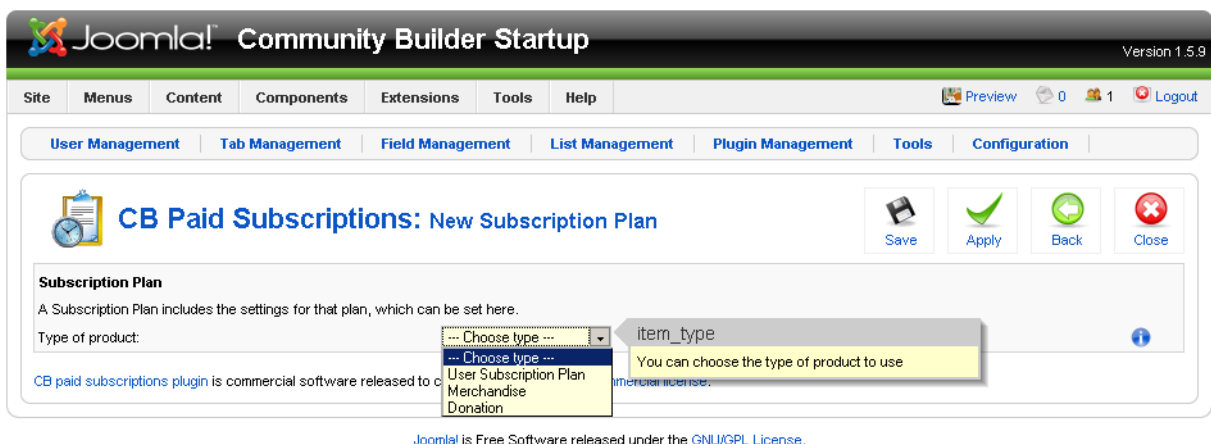


Figure 125: Subscription plan type selection

At this point in time, let us follow the '**User Subscription Plan**' creation path by selecting the appropriate option from the drop-down mechanism in **Figure 125**. Once we select '**User Subscription Plan**', we will be presented with the New Subscription Plan page that contains the following 5 tabs:

- **Presentation tab**

This tab contains parameters and settings that influence the overall presentation of our subscription plan including what is displayed in front-end to users (either during registration or in user profile subscriptions tab or in subscriptions module) or in backend (in CB Paid Subscriptions Plan icon summary area or in CB User Management backend summary pages). Also email workflow texts are configured in the area. The tab contains 15 parameters that must be addressed.

- **Pricing tab**

This area contains all parameters needed to properly configure our subscription plan model. The currency, price, duration, validity, etc are managed in this area.

- **Tax tab**

This area contains parameters needed to configure/select the sales tax that is to be applied for this subscription item. If the Tax plugin (see **Chapter 6.20**) is not installed this tab will not appear at all in this section.

- **Workflows tab**

This area contains all the parameters needed to configure various workflows regarding your subscription plan. CB registration workflows, upgrade workflows and CB login workflows are configured in this area.

- **Access tab**

Parameters of this area are used to configure the accessibility of this plan. Which members (CMS ACL group) have access to this plan is established here.

- **Integrations tab**

This area contains various integration related sub-tabs. Each CB Paid Integrations plugin installed will most likely present a sub-tab in this area. E.g., docman sub-tab, content sub-tab, SQL actions sub-tab, iDevAff sub-tab, etc.

We will analyze each tab of the **Plans** icon area in the following sub-sections.

7.5.1 Plans icon area → Presentation Tab

As previously stated the Presentation tab is used to manage all parameters influencing how our subscriptions plan is presented by the **CBSubs™** system both in front-end and back-end operations. Let's check out all available parameters in detail:

General

- **Name of plan:** [initial value: empty] – Mandatory, must fill-in!

This text field parameter should be populated with the official name of the plan you are preparing. This name will be displayed to your potential subscriber, so you should chose something concise and descriptive. Example: Yearly Documentation Subscription Plan.

- **Alias (short name) of plan:** [initial value: empty] – Mandatory, must fill-in!

This text field parameter **must be populated** with a short alias of your plan. It will be used mainly during backend operations and no front-end user will see this. You should make it as short as possible while providing enough information so you can understand the mapping between alias and real name of plan.

Example: 1YDoc (to mean 1 year documentation plan).

Warning: This short name should be as descriptive as possible because it will be used in various integration aspects of **CBSubs™**.

- **Description of plan:** [initial value: empty]

This editor field parameter should be populated with a detailed description of your plan. You should format and word the description in order to allow your potential subscriber to understand exactly what you are offering with this plan.

Example: This is our paid subscription Gold plan that gives you extra

- **Price display of plan:** [initial value: [AUTOMATIC]]

This parameter is used to formulate how the plan pricing should be rendered/displayed. The default setting will instruct the system to use its internal rendering algorithm. If you do not like this output, you can add your own HTML supported wording. Substitutions are also applicable including: [PRICE], [FOR], [PERIOD], etc as indicated in the field parameter tooltip. Please take note that if you leave this field empty, it will default to [AUTOMATIC], so since this is an HTML enabled parameter you should use to indicate a non-breakable space.

- **Parent plan:** [initial value: Top]

This drop-down field parameter is used to place this plan in a potential hierarchy of plans. The drop-down options will include 'Top' to specify that this plan should be at the highest hierarchy level. Other options will include the 'Alias' names of other existing plans.

- **Ordering:** [initial value: n last]

Drop-down field parameter used to order the presentation of the plan with respect to other plans of the same level. This is just one of 3 methods that can be used to order your plan. You can also use the up (✗) – down (✗) arrows from the **Plans** icon area summary page, or you can use the ordering field from the same page and clicking on the diskette icon (✗)

- **Exclusive plan:** [initial value: Exclusive, other plans of same parent cannot be subscribed same time]

This drop-down field parameter enables you to specify if this plan must exclusive selected compared to other plans of the same parent or not.

Available options include:

- Exclusive, other plans of same parent cannot be subscribed same time
- Not exclusive, other plans of same parent can be subscribed at same time

- **Hide children plans if unselected:** [initial value: 'No, children plans also visible if any']

This Yes/No setting is used to instruct CBSubs™ to hide/show child plans if this plan is selected.

The next 'Template / CSS' framed area contains a drop-down selectable template parameter and potentially additional parameters (depending on the installed CBSubs™ template). It also contains the CSS class parameter. **Figure 126** shows this area as it should appear if the *rounded CBSubs™* template plugin is installed and published as discussed in **Chapter 6.14**.

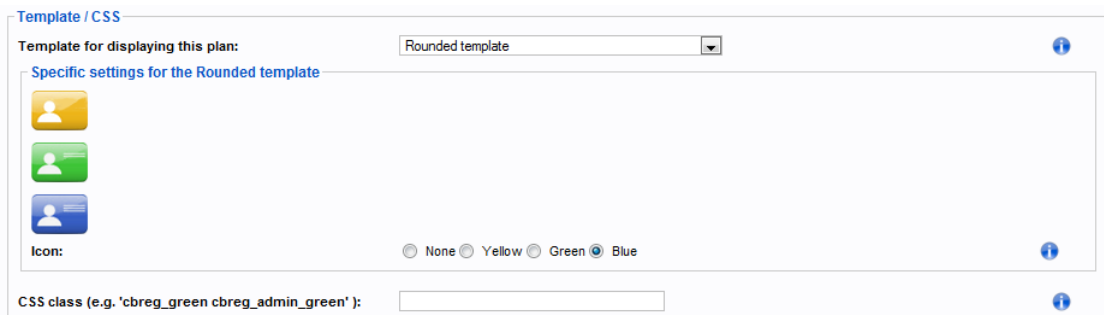


Figure 126: Plan Template/CSS frame with Rounded template installed

- **CSS class (e.g. 'cbreg_green, cbreg_admin_green'):** [initial value: empty]
This text field parameter can be populated with the CSS class that should be used when presenting the plan either in front-end or back-end operations. It is a good idea to color code your plans using this scheme. There are a number of existing admin (back-end) classes and non-admin (front-end) classes that can be selected. Existing classes include:
 - [cbreg_green cbreg_admin_green](#)
 - [cbreg_red cbreg_admin_red](#)
 - [cbreg_yellow cbreg_admin_yellow](#)
 - [cbreg_magenta cbreg_admin_magenta](#)
 - [cbreg_orange cbreg_admin_orange](#)
 - [cbreg_cyan cbreg_admin_cyan](#)
 - [cbreg_blue cbreg_admin_blue](#)

Website workflow texts

- **Thank-you text (payment completed):** [initial value: Thank you for subscribing. You can manage your subscriptions anytime from your user profile.]

This editor field parameter should be populated with the message you would like to appear once the payment has been completed and the subscription has been activated. You can use your editor to format this message to your liking.

This area is also language string friendly.

- **Thank-you text (payment pending):** [initial value: empty]

This editor field parameter should be populated with any message you wish to appear for a pending payment situation. Language strings are supported.

Substitutions in Thank You messages and workflow Emails

- User fields substitutions:

[USERNAME], [NAME], [EMAILADDRESS],[cb)anycbfieldname]

- Plan/Product substitutions:

[PLAN_NAME], [PLAN_ALIAS], [PLAN_DESCRIPTION],
[PLAN_REGISTRATION_PRICE] and [PLAN_UPGRADE_PRICE] (both display period and price), [PLAN_PRICE] (display generic period and price for plan, or amount donated for donation with currency, or price with currency of product for a merchandise), [PLAN_RATE] and [PLAN_FIRST_RATE] are numeric values, and in case of donations, the donation amount converted into the donation plan's currency.

- User Subscription substitutions:

[SUBSCRIPTION_SIGNUP_DATE], [SUBSCRIPTION_EXPIRY_DATE],
[SUBSCRIPTION_LAST_RENEWAL_DATE],
[SUBSCRIPTION_VALIDITY_PERIOD_REMAINING],
[SUBSCRIPTION_EXPIRY_DATE_IF_RENEWED],
[SUBSCRIPTION_VALIDITY_PERIOD_IF_RENEWED],

[SUBSCRIPTION_RENEWAL_PRICE] (displays period and price)

Email on first activation

- **Thank-you email subject (subscription active):** [initial value: empty]
This text field parameter should be populated with the subject you want your thank-you email message to contain. The email message is triggered when a subscription first becomes active. If this field and the body field are empty, then the email message will not be sent. Language strings are supported.
- **Thank-you Email body (subscription active):** [initial value: empty]
This text field should be populated with the body of the email message to be sent to members right after their subscription has been activated. Language strings are supported.
- **Send email in:** [initial value: Text (recommended)]
This drop-down field parameter should be populated with the method to be used when sending thank-you email messages to newly activated members of this subscription plan. Available options are:
 - Text (recommended)
 - HTML (not recommended)
When this value is selected the body parameter must contain the proper HTML tags in order to construct a valid HTML message.
- **Email attachments (absolute server paths):** [initial value: empty]
This text field parameter may be populated with an absolute path filename to be attached to the thank-you email message that is sent. It can be very useful to send a welcoming package or even to send newly activated subscribers your latest software package.
- **CC email to addresses:** [initial value: empty]
This text field parameter can contain a comma (',') separated list of email addresses that should receive carbon-copies of the thank-you email message.

- **BCC email to addresses:** [initial value: empty]

This text field parameter can contain a comma (',') separated list of email addresses that should receive blind-carbon-copies of the thank-you email message.

Similar email frames are available for the following cases:

- Email on pending first payment
- Email at each manual renewal
- Email on pending payment of manual renewal
- Email at each automatic renewal
- Email on expiration
- Email on cancellation by user

7.5.2 Plans icon area → Pricing Tab

The Pricing tab contains all Subscription plan parameters that specify the pricing and duration aspects of our subscription plan. Let's check out all available parameters in detail:

- **Currency:** [initial value: Same as global configuration]

This drop-down field parameter is used to specify the currency of this specific plan. In most cases it should be set to follow the global configuration setting, although you can over-ride and select a different currency.

- **Is the first amount and period different:** [initial value: Always same period and price]

This drop-down field parameter is used to specify that your plan will have a different first time subscription price and period. This concept can be used in various ways to market your products-services. Some concepts that may be enforced using this parameter is perhaps offering a trial period at a better price (or even free) and perhaps shorter duration. Another concept could be to offer a better price for during registration compared to later upgrading. Of course these concepts must be adjusted to your specific business model and product-service. Nevertheless, the available options for this setting are:

- Always same period and price

- Different first period and price for Registration only
- Different first period and price for Upgrade only
- Different first period and price for Registration and Upgrade

- **First payment price of plan:** [initial value: 0.00000]

This text field parameter should be populated with the price you wish to charge for the first time subscription to this plan. The value entered should be a valid decimal (e.g., 10.99, 199.95, etc).

Please note that this field will not appear if the previous “**Is the first amount and period different**”: parameter is set to ‘Always same period and price’.

- **Initial validity duration:** [initial value: No initial validity]

This drop-down field parameter is used to specify the initial validity duration of the first time subscription to this plan. It is used together with the previous setting to establish what the first time subscription to this plan will cost and how long it will last. There are many options included in this drop-down list that should suffice for most cases. Available options are (grouped by concept):

- No initial validity
- 5, 10, 15, 30 minutes
1 hour, 1 hour and 30 minutes, 2 hours, 4 hours, 8 hours, 12 hours
- 1 day (24 hours), 2 days (48 hours)
3 days, 10 days, 20 days, 30 days, 60 days, 90 days
- 1 week (7 days), 2 weeks (14 days), 3 weeks (21 days), 4 weeks (28 days)
- 1 month, 2 months, 3 months, 4 months, 6 months, 9 months
- 1 year, 2 years, 3 years, 5 years, 10 years
- Today (up to midnight), Today and Tomorrow (up to midnight)
Today and next 2 calendar days, Today and next 6 calendar days,
Today and next 7 calendar days
- This calendar month, This and next calendar month,
This and next 2 calendar months, This and next 3 calendar months,
This and next 5 calendar months, This and next 6 calendar months
- This calendar year, This and next calendar year,
This and next 2 calendar years, This and next 3 calendar years,

This and next 5 calendar years, This and next 6 calendar years

- **Regular price of plan:** [initial value: 0.00000]

This text field parameter should be populated with the regular (meaning not the first time subscription – see previous parameters) price you wish to charge for the subscription to this plan. The value entered should be a valid decimal (e.g., 10.99, 199.95, etc).

- **Regular Validity duration:** [initial value:]

This drop-down field parameter is used to specify the regular validity duration of this plan. It is used together with the previous setting to establish what the subscription to this plan will cost and how long it will last. There are many options included in this drop-down list that should suffice for most cases.

Available options are (grouped by concept):

- No initial validity
- 5, 10, 15, 30 minutes
1 hour, 1 hour and 30 minutes, 2 hours, 4 hours, 8 hours, 12 hours
- 1 day (24 hours), 2 days (48 hours)
3 days, 10 days, 20 days, 30 days, 60 days, 90 days
- 1 week (7 days), 2 weeks (14 days), 3 weeks (21 days), 4 weeks (28 days)
- 1 month, 2 months, 3 months, 4 months, 6 months, 9 months
- 1 year, 2 years, 3 years, 5 years, 10 years
- Today (up to midnight), Today and Tomorrow (up to midnight)
Today and next 2 calendar days, Today and next 6 calendar days,
Today and next 7 calendar days
- This calendar month, This and next calendar month,
This and next 2 calendar months, This and next 3 calendar months,
This and next 5 calendar months, This and next 6 calendar months
- This calendar year, This and next calendar year,
This and next 2 calendar years, This and next 3 calendar years,
This and next 5 calendar years, This and next 6 calendar years

- **Start date of calendar year:** [initial value: 01-01]

This text field parameter will appear if a calendar year validity is selected in the 'Regular validity duration:' parameter. It will allow you to select the day and month the calendar year plan should expire on. By default this is set to '01-01' which means that the plan would expire on January 1st each year.

- **Total number of occurrences of regular validity/price (0=unlimited):** [initial value:]

This text field parameter should be populated with the number of allowed subscription occurrences to this plan. The value of '0' should be used to indicate that no limit should be enforced. This value could be used in various ways and concepts. One concept is to use this setting to establish a one time promotional plan, where each member can subscribe only once and after the validity period is over no more renewals (re-subscriptions) are allowed. This could be accomplished simply by setting this parameter to the value '1'.

- **Prorate remaining value of this plan when upgrading:** [initial value: Yes]

This drop-down field parameter (taking 'Yes'/'No' values) specifies if when upgrading from this plan to another 'better' plan, that **CBSubs™** should calculate the remaining (residual) value of this plan and use it to adjust the upgrade price. For example let's say that a plan is charging \$10 for 10 days. After 3 days the residual amount would be \$7 and if this setting is set to 'Yes' then this amount of \$7 will be used against any upgrade plan charges. So if we want to upgrade to a 'better' plan that costs \$20 then we would only be charged \$13 because of the original residual value of \$7 after the first three days. This residual value is only applied if the new plan exclusively prohibits the initial plan and if the upgrade plan is of higher value. The residual value of a plan is calculated based on the price/duration ratio.

- **Bonus time before expiry (for calendar based durations):** [initial value: 'No bonus']

This setting is used for calendar based durations to instruct CBSubs™ to give bonus subscription. For example if this setting is set to '3 months' then user subscribing to during last 3 months of current calendar subscription will be

given an extra calendar period as a bonus.

- **Renewable in advance by:** [initial value:]

This drop-down field parameter allows us to specify how long in advance can a member renew a subscription to this specific plan. Available options include:

- 1 hour, 12 hours, 24 hours
- 3 days, 30 days
- 1 week, 2 weeks
- 1,2,3,4,6,9 months
- 1,2,3 years
- Only after expiration
- Non-renewable

- **Grace period before real expiration:** [initial value:]

This drop-down field parameter specifies the grace period to be given when a subscription to this plan expires. Applicable values include:

- none
- 5, 10, 15, 30 minutes
1 hour, 1 hour and 30 minutes, 2 hours, 4 hours, 8 hours, 12 hours
- 1 day (24 hours), 2 days (48 hours)
3 days, 10 days, 20 days, 30 days, 60 days, 90 days
- 1 week (7 days), 2 weeks (14 days), 3 weeks (21 days), 4 weeks (28 days)
- 1 month, 2 months, 3 months, 4 months, 6 months, 9 months
- 1 year, 2 years, 3 years, 5 years, 10 years

Note: In case of auto-recurring payments it is recommended to set the Grace period parameter to 2 days (at least) in order to take into account processing delays from payment organization process.

- **Manual renewal extends expiration date as follows:** [initial value: 'Renewal starts at expiration date or at payment date – whichever happens last (allows free gap)']

This drop-down parameter field allows you to specify how CBSubs™ should handle renewals of plan and it has the following options:

- 'Renewal starts at expiration date or at payment date – whichever happens last (allows free gap)'

This is the default setting. To understand the mode of operation that this option specifies the following example is provided. If the expiration date of a one year (12 month) plan is 01-02-2011 (February 1st) and the user renews the subscription on 08-02-2011 (one week after the expiration date), then the new expiration date will be 08-02-2012 (exactly 12 months after payment). If the user renews on 15-01-2011 (before expiration), then the new expiration date will be 01-02-2012 (exactly 12 months after normal expiration). Thus there is a gap if user renews after expiration.

- 'Renewal extends expiration date (without gap or overlap)'

Working off the previous example, late renewal will extend the original expiration date by 12 months, so it will be set to 01-02-2012. Early renewal will have the exact same result. This case can be used for club membership use cases.

- 'Renewal starts at payment date (allows overlap or free gap)'

The option will renew the plan starting at payment date. This means that in our previous example, late renewal will result in a new expiration date of 08-02-2012 and an early renewal action would give a new expiration date of 15-01-2012.

- 'Renewal starts at expiration date or at payment date – whichever happens first (allow overlap but no free gap)'

This option will give an expiration date of 15-01-2012 if renewal payment happens on 15-01-2011 and a renewal date of 01-02-2011 if renewal payment happens on 08-02-2011.

- **Auto-recurring renewals (*)**: [initial value:]

Some payment processors allow for automatic recurring payments (ARP) or automated subscriptions payments⁷. If your payment processor supports this

⁷ In case of the Authorize.net payment gateway the term used is ARB (Automated Recurring Billing)

feature and it is implemented and enabled in the payment gateway settings you can take advantage of this parameter by specifying one of the following values:

- No: single payments at a time
- Yes: subscribe user to automatic recurring payments
- User's choice: leave choice to user

Note: Your payment processor needs to support the periods that you set here. E.g. authorize.net ARB has a minimum of 7 days between occurrences. Please test in front-end your settings.

- **Payment item text:** [initial value: PREFIX_TEXT] [PLANS_TITLE]: [ITEM_NAME][VALIDITY_IF_NOT_AUTORECURRING] for [USERNAME]
This text field parameter should be used to specify the item line that should be presented to the 'buyer' on his/her invoice and will also be sent to the payment processor.
You can substitute text using following strings: [PREFIX_TEXT] (depending on payment: can be empty for new subscriptions, or Renew, Upgrade), [ITEM_NAME], [ITEM_ALIAS], [ITEM_DESCRIPTION], [VALIDITY] (displays duration of plan, not recommended as it displays also for auto-recurring plans), [VALIDITY_IF_NOT_AUTORECURRING], [EXPIRY] (not recommended as it displays also for auto-recurring plans, displays expiry date/time (if configured), [EXPIRING_IF_NOT_AUTORECURRING] (displays expiring on date +time if configured to display time, formatted by CB date format), [PLANS_TITLE], [SITENAME], [SITEURL], [USERNAME], [NAME], [EMAILADDRESS] and any [cb_fieldname].
- **Payment processor item text (short):** [initial value: [PREFIX_TEXT] [ITEM_ALIAS][VALIDITY_IF_NOT_AUTORECURRING]]
This is the short item text sent to the payment processor. Please see previous parameter for valid substitution strings.

Substitutions in Payment item text and Payment processor item text

- Payment item substitutions:
[PREFIX_TEXT] (depending on payment: can be empty for new subscriptions, or Renew, Upgrade), [ITEM_NAME], [ITEM_ALIAS], [ITEM_DESCRIPTION], [PLANS_TITLE], [SITENAME], [SITEURL] and any [cb_fieldname]
- User fields substitutions:
[USERNAME], [NAME], [EMAIL],[cb]anycbfieldname]
- Plan/Product substitutions:
[PLAN_NAME], [PLAN_ALIAS], [PLAN_DESCRIPTION],
[PLAN_REGISTRATION_PRICE] and [PLAN_UPGRADE_PRICE] (both display period and price), [PLAN_PRICE] (display generic period and price for plan, or amount donated for donation with currency, or price with currency of product for a merchandise), [PLAN_RATE] and [PLAN_FIRST_RATE] are numeric values, and in case of donations, the donation amount converted into the donation plan's currency.
- User Subscription substitutions:
[SUBSCRIPTION_SIGNUP_DATE], [SUBSCRIPTION_EXPIRY_DATE],
[SUBSCRIPTION_LAST_RENEWAL_DATE],
[SUBSCRIPTION_VALIDITY_PERIOD_REMAINING],
[SUBSCRIPTION_EXPIRY_DATE_IF_RENEWED],
[SUBSCRIPTION_VALIDITY_PERIOD_IF_RENEWED],
[SUBSCRIPTION_RENEWAL_PRICE] (displays period and price)
- **Owner id (only supported: 0 for now):** [initial value: 0]
This is the owner of this plan, used to determin the payment gateway.

7.5.3 Plans icon area → Tax Tab

The Tax tab will be present in the Plans icon area is the **CBSubs Tax** plugin is installed and published as described in **Chapter 6.20**. Such a tab is illustrated in **Figure 127**.

[Presentation](#) [Pricing](#) [Tax](#) [Workflows](#) [Access](#) [Integrations](#)

Sales Tax / VAT settings for this product

Taxes included in plan prices	Default from Settings / Tax
Tax rule to apply	Default Tax Rule is applied ▾
Default Tax Rule	Not subject to sales tax
Sales Tax rates to be applied	Apply taxes valid during validity time proportionally, for all taxes allowing this ▾

Figure 127: Plans icon tax tab

The tab has the following parameters:

- **Taxes included in plan prices:** [initial value: Default from Settings / Tax]
This parameter is used to configure how taxes influence the displayed plan price.
- **Tax rule to apply:** [initial value: Default Tax Rule is applied]
This drop-down select field parameter is populated with the two values 'Default Tax Rule is applied' and 'Not subject to sales tax' plus whatever tax rules have been created in the **Tax Settings** icon area described in **Chapter 7.16.3**. If the 'Not subject to sales tax' option is selected the second parameter '**Sales Tax rates to be applied**' will disappear as it is not applicable.
- **Sales Tax rates to be applied:** [initial value: 'Apply taxes valid during validity time proportionally for all taxes allowing this']
This drop-down select field parameter can be set to one of the following options:
 - Apply taxes valid at buying time even if tax allows to be applied proportionally.
 - Apply taxes valid during validity time proportionally for all taxes allowing this.

7.5.4 Plans icon area → Workflows Tab

The Workflows tab contains all Subscription plan parameters that specify the various workflows used directly or indirectly by the **CBSubs™** system for a plan. There are three (3) workflows that are involved: the CB registration workflow, the subscriptions upgrade workflow, and the CB login workflow. As of **CBSubs™** 1.2, the first two workflows have a conditions configuration mechanism that can be used to specify under which conditions this plan will be proposed to the end user. Let's check out all available parameters in detail:

- **Selected by default:** [initial value: 'No']

This 'Yes/No' drop-down field parameter is used to specify if this plan is to be selected by default.

CB registration Workflow

- **Allow registration:** [initial value: Yes]

This 'Yes/No' drop-down field parameter is used to indicate if this plan should be presented as an option during the CB registration process. If this parameter is set to 'No', then this plan can only be accessed after successful registration by the registered user visiting his CB profile where he/she will see this plan as an upgrade option in the Subscriptions tab.

- **Propose spontaneously plan at registration:** [initial value: 'Yes: show automatically plan for normal registrations (recommended)']

This field parameter appears only if the previous 'Allow registration:' parameter has been set to 'Yes'. The applicable values for this setting are:

- 'Yes: show automatically plan for normal registrations (recommended)'
This setting specifies if the plan is to be spontaneously proposed and presented during registration (front-end).
- 'No: hide this plan from registration, unless included in URL or needed for access'

This specifies that this plan should not 'spontaneously' appear or be proposed unless absolutely needed. One method to make a plan with a setting of 'No' in the parameter appear is to use the URL of the plan as described in **Chapter 7.5.6.18**.

- 'No, hide this plan from registration and from access proposals, unless specifically included in URL'

Use this setting to hide this plan unless it was included in URL.

- **User Email Confirmation:** [initial value: Default (CB setting)]

This field parameter appears only if the previous 'Allow registration:' parameter has been set to 'Yes'. It is a drop-down field parameter that is used to specify how the 'User Email Confirmation' workflow will work for this plan.

Available options are:

- Default (CB setting)
With this option selected the system will use the CB settings as specified in the Community Builder → Configuration → Registration tab 'Require Email Confirmation' parameter.
- Yes, before payment (override CB)
This option will require email confirmation to happen **before** the payment process regardless of the Community Builder → Configuration → Registration tab 'Require Email Confirmation' parameter setting value.
- Yes, after payment (override CB)
This option will require email confirmation to happen **after** the payment process regardless of the Community Builder → Configuration → Registration tab 'Require Email Confirmation' parameter setting value.
- No (override CB)
This option will **not require** email confirmation to happen at all regardless of the Community Builder → Configuration → Registration tab 'Require Email Confirmation' parameter setting value.

- **User Approval by Moderator:** [initial value: Default (CB setting)]

This field parameter appears only if the previous 'Allow registration:' parameter has been set to 'Yes'. The drop-down field setting instructs the system whether to use or over-ride the CB settings as specified in the Community Builder → Configuration → Registration tab → 'Require Admin Approval' parameter. Available options are:

- Default (CB setting)
With this option selected the system will use the CB settings as specified in the Community Builder → Configuration → Registration tab 'Require Admin Approval' parameter.
 - Yes, before payment (override CB)
This option will require Administration approval of registration application to happen **before** the payment process regardless of the Community Builder → Configuration → Registration tab 'Require Admin Approval' parameter setting value.
 - Yes, after payment (override CB)
This option will require Administrator (or moderator) approval of registration application to happen **after** the payment process regardless of the Community Builder → Configuration → Registration tab 'Require Admin Approval' parameter setting value.
 - No (override CB)
This option will **not require** Administrator (or moderator) approval to happen at all regardless of the Community Builder → Configuration → Registration tab 'Require Admin Approval' parameter setting value.
- **Hides fields at registration:** [initial value: -nothing selected-]
This field parameter appears only if the previous 'Allow registration:' parameter has been set to 'Yes'. It is a multi-selectable field parameter used to instruct the **CBSubs™** system to hide one or more CB fields (marked to appear on registration form) from the registration process if this plan is selected during the registration process. This is a nice feature as it allows you to customize the actual registration fields per plan. All CB Fields marked for registration appearance will be presented in this multi-select box for your consideration.

As of **CBSubs™** 1.2 an extra (expandable parameter setting) frame has been added to be able to further configure under which circumstances (conditions) a plan should be displayed during the registration process.

The “Conditions on other plans and CB Fields to show this plan and to allow subscribing to it” frame will appear only if the previous ‘Allow registration.’ parameter has been set to ‘Yes’.

Dynamic Conditions on other plans and CB Fields to show this plan and to allow subscribing to it

- **Conditions:** [initial value: -- None (click to add dynamic conditions if needed) - -]

This drop-down selectable field is used to instruct the system to consider additional conditions before displaying this plan during the registration process. The available options are:

- ‘-- None (click to add dynamic conditions if needed) --’
This is the default/initial setting to not impose further conditions for displaying the plan during the registration process.
- ‘These conditions must be met to show this plan at registration.’
This setting is used to configure additional condition criteria that must be satisfied before displaying this plan in the registration form. Once this value is selected two (2) additional field parameter frames will appear in the current framed section.

Conditions on other plans to show this plan at registration

- **Any of the following plans must also be selected:**

This multi-select area field parameter contains all the plan aliases that can be selected (use CTR/CMD button to select more than one entry). The selected plans must be chosen during the registration process in order for this plan to be proposed.

- **None of the following plans can also be selected:**

This multi-select area field parameter contains all the plan aliases that can be selected (use CTR/CMD button to select more than one entry). None of the selected plans must be chosen during the registration process in order for this plan to be proposed.

Conditions on CB Fields to show this plan at registration

- **All of following CB fields must be filled-in/selected at registration:**

This multi-select area field parameter contains all the CB fields (marked to appear on registration form), which can be selected (use CTR/CMD button to select more than one entry). All these selected CB fields must be populated during the registration process in order for this plan to be proposed/displayed.

- **And all of following CB fields must be empty/unselected at registration:**

This multi-select area field parameter contains all the CB fields (marked to appear on registration form) which can be selected (use CTR/CMD button to select more than one entry). If any one of these selected CB fields is populated during the registration process then this plan will not be proposed/displayed.

- **And following CB Field:**

This drop-down field parameter can be used to select one of the CB fields that is to be used in a CB field value conditions criteria. Once this parameter is set to a CB field, two (2) more parameter fields will appear: the 'Condition:' parameter and the 'Value:' parameter.

- **Condition:**

This drop-down field parameter contains condition formula that should be evaluated in reference to the previously populated 'And following CB Field:' setting and the following 'Value:' setting.

Available criteria formulas include:

- '= (is equal to)'

Use this setting to compare if the previously selected CB field is equal to the 'Value:' parameter (to be described in next parameter)

- '<> (is different from)'

Use this to setting to compare if the selected CB field is not equal to the 'Value:' parameter.

- '< (Is Smaller than)'
Use to compare if the CB field selected is smaller than the 'Value:' parameter.
 - '> (Is Larger than)'
Use to compare if the CB field selected is larger than the 'Value:' parameter.
 - 'Contains'
Use this to check if the CB field selected contains the 'Value:' parameter in its string.
 - 'Does not contain'
Use to check if the CB field selected does not contain the 'Value:' parameter string.
 - 'Regexp above matches value below'
Use this setting to check if the selected CB field value matches the regular expression pattern of the 'Value:' parameter.
 - 'Regexp above does not match value below'
Use this setting to check if the selected CB field value does not match the regular expression pattern of the 'Value:' parameter.
- **Value:** [initial value: empty]
This text field parameter is used to specify the value of the right side of the comparison condition we have been creating. The string cannot contain CB field substitutions since these fields have not been populated yet as we are working with the registrations form scope. You can however use regular expressions here.

Subscriptions upgrades workflows

- **Allow upgrades to this:** [initial value: Yes]
This 'Yes/No' drop-down field parameter allows you to specify if this plan should be presented as an upgrade option. This parameter could help you implement a concept where a plan is only applicable during the registration process and from then on it will not be presented ever again (if this parameter is set to 'No'). Example: You can create 2 plans – a buyer plan and a seller plan that are mutually exclusive (meaning that you must choose one or the

other) and both plans appear during registration but (with this parameter set to 'No') will no longer appear after registration. This concept in essence forces new applicants to decide right from the beginning if this membership account is for a buyer or a seller.

- **Propose plan for upgrades only if its more expensive:** [initial value: 'Yes: It will be possible to upgrade to this plan only if it's more expensive (default)']

This parameter accepts the following settings:

- 'Yes: It will be possible to upgrade to this plan only if it's more expensive (default)
 - 'No: It will be possible to upgrade to this plan (for free with pro-rating) if all conditions below and elsewhere are met'
- **Propose spontaneously plan for upgrades:** [initial value: 'Yes: show automatically plan for normal upgrades (recommended)']

This setting has the following options:

- 'Yes: show automatically plan for normal upgrades (recommended)'
 - 'No: hide this plan from upgrades, unless included in URL or needed for access'
 - 'No: hide this plan from upgrades and from access proposals, unless specifically included in URL'

Static Conditions on already existing subscriptions and CB Fields and Dates to allow upgrades

- First condition: [initial value: '-- None (Click to add static conditions if needed) -']

This drop-down select field parameter is used to specify the how the condition criteria evaluation will trigger the displaying or not displaying of the plan in an upgrade workflow. The applicable values are:

- -- None (Click to add static conditions if needed) --'

This is the default value which indicates that no condition exists.

- 'This condition must be met to allow upgrades:'

This setting is used to instruct the system that the condition (that will follow) needs to be met in order for the plan to be proposed as an upgrade.

This option will automatically cause a new "Condition 1" framed area to

appear which also contains two (2) other framed areas: the “Existing subscriptions” and the “Dates/CB Fields Comparisons” framed areas.

- ‘This condition must NOT be met to allow upgrades:’

This setting is used to instruct the system that the condition must not be met in order for the plan to be proposed as an upgrade.

This option will automatically cause a new “Condition 1” framed area to appear which also contains two (2) other framed areas: the “Existing subscriptions” and the “Dates/CB Fields Comparisons” framed areas.

Condition 1

This framed area appears only if the ‘First condition:’ drop-down field is set to a value other than its initial ‘-- Add Condition --’ value. It contains two (2) other framed areas along with a ‘Second condition And/Or:’ setting to expand the formula with an additional ‘Condition 2’ statement.

Existing subscriptions

- Any of the following plans subscriptions: [initial value: nothing selected]

This multi-select area field parameter is used to select a set of plans that are to be checked for existing subscription. If at least one of the plans selected has an existing subscription (and all other conditions are met), then the plan will be suggested as an upgrade.

- Must be in a state: [initial value: nothing selected]

This multi-select area field parameter is used to specify which states a plan subscription (see previous parameter) should be in (any one of the selected states applies). If any one of the previous selected plans is in any one of the selected states, the condition will hold true.

Dates / CB Field comparisons

- Date A, Field A or Value A: [initial value: ‘is not relevant’]

This drop-down field parameter is used to specify the element A of a comparison formula. The following options are available:

- is not relevant
- Order Date of the order wanting to use this promotion
- Subscription Date of existing user subscriptions above

- Last renewed Date of existing user subscriptions above
- Expiry Date of existing user subscriptions above
- Payment Date of existing merchandise/donations above
- Following CB field
- Constant Value of String (CB substitutions can be used)

If the previous parameter ('Date A, Field A or Value A:') is set to one of the options above that is not a **date** related option, then one additional field parameters will appear: the 'CB Field A:' parameter of the 'Value A:' parameter.

The 'Date B, Field B or Value B:' parameter will operate in a similar fashion.

Once the A and B parameters are specified we will be able to set the 'Condition 1 (> for Dates):' drop-down parameter to operate on the A and B elements.

The 'Condition 1 (> for Dates):' parameter can be set to one of the following values:

- '-- choose comparison condition 1 --'
This is the default/initial value and typically means that no comparison function is selected.
- 'A = B (Value A is equal to Value B)'
- 'A <> B (Value A is different from Value B)'
- 'A < B (Value A is smaller than Value B)'
- 'A > B (Value A is larger than Value B)'
- 'Value A contains Value B'
- 'Value A does not contain Value B'
- 'Value A matches the Regexp contained in Value B'
- 'Value A does not match the Regexp contained in Value B'
- 'Birthday function: Date A matches month and day but not year of Date B'
- 'For dates: Date A > Date B - 20 years (Date A must be later than 20 years before Date B)'
- ...
- 'For dates: Date A > Date B - 5 minutes (Date A must be later than 5 minutes before Date B)'
- 'For dates: Date A > Date B (Date A must be later than Date B)'

- For dates: Date A > Date B + 5 minutes (Date A must be later than 5 minutes after Date B)
- ...
- 'For dates: Date A > Date B + 20 years (Date A must be later than 20 years after Date B)'

Note: Currently date comparisons can only be made for dates after 1.1.1970.

We can also append another condition to our formula with the help of the following parameter:

- Second condition And/Or: [initial value: '-- Add condition --']
This drop-down select field parameter can be set to one of the following options:
 - '-- Add condition --'
 - AND
 - OR
 - Either Or but not both same time (Exclusive OR)
 - AND NOT

If the previous parameter is set to anyone of the available settings except the default initial setting, then another set of framed areas will appear for condition 2 of our conditions formula.

Condition 2

... similar to condition 1 ...

Existing subscriptions

... see previous ...

Dates / CB Field comparisons

... see previous ...

CB Logins workflows

- **URL for first login visit:** [initial value: empty]

This text field parameter is used to specify what URL a member of this plan is redirected to after the first login following successful registration and

(immediate) subscription to this plan. In order for this to work, the first login redirect parameter setting of the CB Configuration registration tab should be set to empty.

- **URL for every login:** [initial value: empty]

This text field parameter is used to specify what URL a member of this plan is redirected to after each login. The concept here is to establish a 'landing page' for each plan.

- **Multiple subscriptions per user:** [initial value: 'Only one subscription at a time']

This drop-down single select parameter field specifies whether or not multiple subscriptions are allowed to this plan by a single user or not. A use-case for this setting is a license subscription, where a user can actually subscribe multiple times to the same plan, once for each license situation.

7.5.5 Plans icon area → Access Tab

The Access tab contains all Subscription plan parameters that specify how this plan is accessed by the website members. Let's check out all available parameters in detail:

Access

- **Published:** [initial value: Yes]

This 'Yes/No' drop-down field parameter is used to indicate if this plan should be published or not.

- **Allow new subscriptions:** [initial value: Yes]

This 'Yes/No' drop-down field parameter is used to indicate if this plan should be open for accepting new subscriptions. If the parameter is set to 'No', then this plan will not be presented as option for new subscribers but will remain active for existing ones. One concept that may be supported by this parameter is to create a plan that is only offered for a limited time. Once the time period has expired, we just set this parameter value to 'No'.

- **Visible for Group (and above this group):** [initial value: Public Front-end]
This drop-down field parameter is used to specify which CMS ACL group this plan is visible to. For example, one concept we can formulate with this setting is to have plans that are only visible for members that belong to the 'Author' ACL group. Of course such a plan should (obviously) also be excluded from being presented during the website registration process.

Subscribers User access level settings

- **User Group:** [initial value: No change of user group]
This drop-down field parameter is used to instruct the **CBSubs™** system to change the CMS ACL user group for all members of this plan to the specific setting.
Note: Use this setting to promote users to higher than registered group. This way when subscription ends a user can be demoted again to registered group. This concept is briefly mentioned in the note that accompanies the Settings area icon -> General tab described in **Chapter 7.3.1.2**.

7.5.6 Plans icon area → Integrations Tab

The Integrations tab contains all integration settings and parameters that can be applied-supported to a given plan. This tab has a number of sub-tabs depending on the number of installed **CBSubs™** integration plugins. As mentioned during the early chapters (see **chapter 5.1**) of this document discussing the distribution and installation process, a number of integration plugins are bundled in the initial **CBSubs™** package. Most of these integration plugins when installed will generate sub-tabs for this area (e.g., DOCman, CB Fields, SQL, etc). We will be discussing these sub-tabs in more detail in the sub-chapters that follow.

7.5.6.1 Plans icon area → Integrations Tab → DOCman sub-tab

The *Error! Reference source not found.* integration plugin (see **chapter** *Error! Reference source not found.*) when installed will add a '**DOCman**' sub-tab to our **Plans** icon area Integrations tab as illustrated in **Figure 128**. This sub-tab will present us with 2 **DOCman** related integration parameters that may be appropriately set in a plan to support specific integration needs. These 2 parameters are:

- **Subscription 1 groups:** [initial value: --nothing selected--]

This tab will automatically integrate with the **DOCman** component and will present all valid-published **DOCman** groups as selectable items for this first parameter. You may select one or more **DOCman** groups that each subscriber to this plan should belong to. A simple concept scenario that may be supported with this parameter is a situation where a plan grants download access to one or more files. These files may be uploaded into the **DOCman** component and may be protected as only accessible by members in a specific **DOCman** group. Using this parameter you can assign each member of this plan to automatically be included in this **DOCman** group.

- **Remove groups upon plan deactivation:** [initial value: Yes]

This 'Yes/No' drop-down field parameter is used to specify if the **CBSubs™** system should remove a user from the previous **DOCman** groups (see previous parameter) when the user is no longer a member of this plan. In order to support the concept mentioned in the previous parameter, we need to set this specific parameter to the value 'Yes'.

The screenshot shows the 'Subscription Plan' configuration interface. At the top, it says 'A Subscription Plan includes the settings for that plan, which can be set here.' Below this, several fields are listed: 'Name of product:' (Testing Workgroup), 'Type of product:' (User Subscription Plan), 'Subscriptions with this plan:' (61), 'Active subscriptions with this plan:' (61), 'Expired subscriptions with this plan:' (0), and 'Subscriptions with this plan that have been upgraded to another plan:' (0). A 'Warning:' section contains a message about changing plans. Below the warning, there are tabs for 'Presentation', 'Pricing', 'Workflows', 'Access', and 'Integrations'. The 'Integrations' tab is active, showing 'Integrations settings (if integrating plugins are loaded):'. Under this, there are sub-tabs for 'CB Fields', 'Content', 'Extensions', 'Docman', 'Email', 'SQL actions', 'AcyMailing', and 'Plan Image'. The 'Docman' sub-tab is selected, displaying 'Docman groups of user changing on plan activation and deactivation:'. This section includes a 'Subscription 1 groups:' dropdown menu with four options: 'CB GroupJive Test Team Members', 'CB Team Plugin Members', 'CB Test Team Members', and 'CBSubs Test Team Members'. The 'Remove groups on plan deactivation:' dropdown is set to 'Yes'.

Figure 128: DOCman Integration sub-tab

7.5.6.2 Plans icon area → Integrations Tab → Remository sub-tab

The *Error! Reference source not found.* integration plugin (see **chapter** *Error! Reference source not found.*) when installed will add a 'Remository' sub-tab to our **Plans** icon area Integrations tab. This sub-tab will present us with 2 Remository related integration parameters that may be appropriately set in a plan to support specific integration needs. These 2 parameters are:

- **Subscription 1 groups:** [initial value: --nothing selected--]
This tab will automatically integrate with the **Remository** component and will present all valid-published **Remository** groups as selectable items for this first parameter. You may select one or more **Remository** groups that each subscriber to this plan should belong to. A simple concept scenario that may be supported with this parameter is a situation where a plan grants download access to one or more files. These files may be uploaded into the **Remository** component and may be protected as only accessible by members in a specific **Remository** group. Using this parameter you can assign each member of this plan to automatically be included in this **Remository** group.
- **Remove groups upon plan deactivation:** [initial value: Yes]
This 'Yes/No' drop-down field parameter is used to specify if the **CBSubs™** system should remove a user from the previous **Remository** groups (see previous parameter) when the user is no longer a member of this plan. In order to support the concept mentioned in the previous parameter, we need to set this specific parameter to the value 'Yes'.

7.5.6.3 Plans icon area → Integrations Tab → Content sub-tab

The **CBSubs Content** integration plugin (see **chapter 6.15**) when installed will add two sub-tabs to the **Plans** icon area Integrations tab. These sub-tabs are tagged as 'Content' and 'Extensions' and are used to restrict CMS content access or CMS component access by **CBSubs™** Subscription Plan. The parameter settings of the 'Content' sub-tab are:

- **Sections which access rights depend on this plan:** [initial value: -nothing selected-]

This multi-select field parameter is populated by the installed integration plugin with all CMS content sections. By selecting one or more sections in this list, you are in fact instructing the **CBSubs™** system to restrict access to articles of these selected sections to Plan members only (means that only Plan members may view and others may not).

- **Categories which access rights depend on this plan:** [initial value: -nothing selected-]

This multi-select field parameter is populated by the installed integration plugin with all CMS content categories. By selecting one or more categories in this list, you are in fact instructing the **CBSubs™** system to restrict access to articles of these selected categories to Plan members only (means that only Plan members may view and others may not).

- **Contents which access rights depend on this plan:** [initial value: -nothing selected-]

This multi-select field parameter is populated by the installed integration plugin with all CMS content articles. By selecting one or more content articles in this list, you are in fact instructing the **CBSubs™** system to restrict access to these selected articles to Plan members only (means that only Plan members may view and others may not).

- **Sections which AUTHORIZING rights depend on this plan:** [initial value: -nothing selected-]

By selecting one or more sections in this list, you are in fact instructing the **CBSubs™** system to restrict authoring access to articles of these selected sections to Plan members only (means that only Plan members may author and others may not).

- **Categories which AUTHORIZING rights depend on this plan:** [initial value: -nothing selected-]

By selecting one or more categories in this list, you are in fact instructing the

CBSubs™ system to restrict authoring access to articles of these selected categories to Plan members only (means that only Plan members may author and others may not).

- **Contents which AUTHORIZING rights depend on this plan:** [initial value: - nothing selected-]

By selecting one or more articles in this list, you are in fact instructing the **CBSubs™** system to restrict authoring access these selected articles to Plan members only (means that only Plan members may author and others may not).

- **Sections which EDITING rights depend on this plan:** [initial value: -nothing selected-]

By selecting one or more sections in this list, you are in fact instructing the **CBSubs™** system to restrict editing access to articles of these selected sections to Plan members only (means that only Plan members may edit and others may not).

- **Categories which EDITING rights depend on this plan:** [initial value: - nothing selected-]

By selecting one or more categories in this list, you are in fact instructing the **CBSubs™** system to restrict editing access to articles of these selected categories to Plan members only (means that only Plan members may edit and others may not).

- **Contents which EDITING rights depend on this plan:** [initial value: -nothing selected-]

By selecting one or more articles in this list, you are in fact instructing the **CBSubs™** system to restrict editing access to these selected articles to Plan members only (means that only Plan members may edit and others may not).

- **Sections which PUBLISHING rights depend on this plan:** [initial value: - nothing selected-]

By selecting one or more sections in this list, you are in fact instructing the **CBSubs™** system to restrict publishing access to articles of these selected

sections to Plan members only (means that only Plan members may publish and others may not).

- **Categories which PUBLISHING rights depend on this plan:** [initial value: - nothing selected-]
By selecting one or more categories in this list, you are in fact instructing the **CBSubs™** system to restrict publishing access to articles of these selected categories to Plan members only (means that only Plan members may publish and others may not).
- **Contents which PUBLISHING rights depend on this plan:** [initial value: - nothing selected-]
By selecting one or more articles in this list, you are in fact instructing the **CBSubs™** system to restrict publishing access to these selected articles to Plan members only (means that only Plan members may publish and others may not).
- **Menus which access depend on this plan:** [initial value: -nothing selected-]
By selecting one or more menu items from this list you are instructing the **CBSubs™** system to restrict access to these menu items to Plan members only (means that only Plan members may access and others may not).

7.5.6.4 Plans icon area → Integrations Tab → Extensions sub-tab

The **CBSubs Content** integration plugin (see **chapter 6.15**) when installed will add two sub-tabs to the **Plans** icon area Integrations tab. These sub-tabs are tagged as 'Content' and 'Extensions' and are used to restrict CMS content access or CMS component access by **CBSubs™** Subscription Plan. The parameter settings of the 'Extensions' sub-tab are:

- **Components which access depends on this plan:** [initial value: -none selected-]
This multi-select field parameter is populated by the installed integration plugin with all CMS installed components. By selecting one or more component items from the generated list you will be instructing the **CBSubs™** system to restrict

access to these components to Plan members only.

- **Modules which access depend on this plan:** [initial value: -none selected-]
This multi-select field parameter is populated by the installed integration plugin with all CMS installed modules. By selecting one or more module items from the generated list you will be instructing the **CBSubs™** system to restrict access to these modules to Plan members only.
- **URL Parts (non-SEFed):** [initial value:]
This parameter is populated in a free-text manner by typing non SEFed URLs in the appropriate area. After each URL just press the ENTER key. This list of URLs is restricted to Plan members only.

7.5.6.5 Plans icon area → Integrations Tab → SQL actions sub-tab

The **CBSubs SQL Actions** integration plugin (see **chapter 6.16**) when installed will add an extra SQL actions sub-tabs to the **Plans** icon area Integrations tab. This sub-tab is used to specify various SQL database statements that should be executed when a new member subscribes to a plan or when a member un-subscribes from a plan. This integration is extremely powerful and thus very dangerous and should be used only by real experts.

The sub-tab basically provides 5 paired parameters that contain SQL statement pairs that are to be executed when a member first joins a plan or when a member leaves a plan.

Note: The best way to make safe use of this concept is to post your concept and SQL statement on the Joomlapolis forums for the **CBSubs™** system. This way there will be a repository of SQL statements and concept scenarios they apply to and you will not need to experiment and put your site in danger. The SQL forum area for **CBSubs™** is located at:

<http://www.joomlapolis.com/forum/90-sql-actions?limitstart=0&limit=6>

Warning: This plugin should not be used to alter #__user and/or #__comprofiler tables, the CBFields integration plugin should be used to alter CB Field values (stored in #__comprofiler table).

7.5.6.6 Plans icon area → Integrations Tab → CB Fields sub-tab

The **CBSubs CB Field** integration plugin (see **chapter 6.4**) when installed will add this CB Fields sub-tab to the **Plans** icon area Integrations tab. This sub-tab will allow you to give specific values to a set of 10 CB fields when a member joins a plan. The integration plugin will basically gather all CB fields (that are published) and present them in a drop-down field parameter for each of the 10 parameters of this sub-tab. For each of these 10 parameters you may specify a value to be assigned to the appropriate CB field when a member joins a plan and you can also specify if this value is to be removed (or not) when the member leaves a plan.

There are quite a few concepts that can materialize using this sub-tab. One example is to give status symbols for plan members in order to be able to distinguish plan members from members who have not joined the plan.

Please note that this sub-tab should be configured in collaboration with the iDevAff integrations tab in the **Settings** icon area – see **Chapter 7.3.8.3**.

7.5.6.7 Plans icon area → Integrations Tab → PostAfPro sub-tab

The **CBSubs PostAfPro** integration plugin (see **Chapter 6.18**) when installed will add this CB Fields sub-tab to the **Plans** icon area Integrations tab. This sub-tab will allow you to give specific values that are to be passed to the PAP system when a member joins this plan.

There are 2 parameters that can be specified in this sub-tab:

- **Campaign ID:** [initial value: empty]

This text field parameter may be populated with a custom campaign id or left blank to specify the default PAP campaign.

- **Custom Commission:** [initial value: empty]

This text field parameter may be populated with an exact value or a percentage for the commission regarding subscriptions to this plan. Leaving the field blank will result to the default PAP commission value.

Please note that this sub-tab should be configured in collaboration with the PAP integrations tab in the **Settings** icon area – see **Chapter 7.3.8.2**.

7.5.6.8 Plans icon area → Integrations Tab → iDev sub-tab

The **CBSubs iDevAf** integration plugin (see **chapter 6.17**) when installed will add this iDev sub-tab to the **Plans** icon area Integrations tab. This sub-tab at the moment has no functionality and it will just refer you back to the **Settings** icon area to configure the global integration parameters for iDev (see **Chapter 7.3.8.3**).

7.5.6.9 Plans icon area → Integrations Tab → Email sub-tab

The **CBSubs Email** integration plugin (see **Chapter 6.18**) when installed will add this Email sub-tab to the **Plans** icon area Integrations tab. This sub-tab will allow you to specify email message templates that will be sent when certain plan events take place.

Initially you can specify the ‘Sender’ information of the email messages to be sent. This information is specified by completing the **From Name:** and **From Address** in the **Email From** frame as illustrated in the top part of **Figure 129**.

Email From

From Name:

From Address:

Activation Email

To, CC, BCC, Subject, and Body can use CB field substitutions (e.g. [user_id] or [username]).

To:

CC:

BCC:

Subject:

Body:

Attachments:

Send email in:

Figure 129: Email sub-tab Activation trigger

Once the **Email From** frame area is populated in **Figure 129** we can specify the email message to be sent when a new activation takes place in this plan. You can specify main recipient(s) (**To:** field), carbon copy recipient(s) (**CC:** field), an email subject (**Subject:** field), the main body of the email (**Body:** field), email attachment(s) (**Attachments:** field) and finally if the email message(s) should be sent as text or HTML (**Send email in:** field). You can have multiple recipients by separating the email addresses using a comma character. You may also use CB field replacement strings like [cb_fieldname]. To send a message to the actual subscriber being activated just use the [email] replacement string.

You can use this method to notify specific teams on your website that a new subscription has just been activated.

Note: Please take note that even though in other areas the CB replacement string [EMAILADDRESS] for email addresses works, the **CBSubs™** email integration plugin needs the substitution [email] to accomplish email address substitution.

The following substitutions can be used in your email subjects and body areas:

- User fields substitutions:
[USERNAME], [NAME], [EMAIL],[cb]anycbfieldname]

- Plan/Product substitutions:
[PLAN_NAME], [PLAN_ALIAS], [PLAN_DESCRIPTION],
[PLAN_REGISTRATION_PRICE] and [PLAN_UPGRADE_PRICE] (both display period and price), [PLAN_PRICE] (display generic period and price for plan, or amount donated for donation with currency, or price with currency of product for a merchandise), [PLAN_RATE] and [PLAN_FIRST_RATE] are numeric values, and in case of donations, the donation amount converted into the donation plan's currency.
- User Subscription substitutions:
[SUBSCRIPTION_SIGNUP_DATE], [SUBSCRIPTION_EXPIRY_DATE],
[SUBSCRIPTION_LAST_RENEWAL_DATE],
[SUBSCRIPTION_VALIDITY_PERIOD_REMAINING],
[SUBSCRIPTION_EXPIRY_DATE_IF_RENEWED],
[SUBSCRIPTION_VALIDITY_PERIOD_IF_RENEWED],
[SUBSCRIPTION_RENEWAL_PRICE] (displays period and price)

In the following **Figure 130**, **Figure 131**, **Figure 132**, **Figure 133**, **Figure 134**, and **Figure 135** you can see additional email triggering options that can be configured in this integration sub-tab.

Pending first payment Email

Name, Address, To, CC, BCC, Subject, and Body can use CB field substitutions (e.g. [user_id] or [username]).

From

Name: ⓘ

Address: ⓘ

Email

To (Required if used): ⓘ

CC: ⓘ

BCC: ⓘ

Subject: ⓘ

Body: ⓘ

Attachments: ⓘ

Send email in: ⓘ

Figure 130: Email sub-tab Pending first payment email trigger

Manual Renewal Email

Name, Address, To, CC, BCC, Subject, and Body can use CB field substitutions (e.g. [user_id] or [username]).

From

Name: ⓘ

Address: ⓘ

Email

To (Required if used): ⓘ

CC: ⓘ

BCC: ⓘ

Subject: ⓘ

Body: ⓘ

Attachments: ⓘ

Send email in: Text ⓘ

Figure 131: Email sub-tab Manual renewal trigger

Pending payment of manual Renewal Email

Name, Address, To, CC, BCC, Subject, and Body can use CB field substitutions (e.g. [user_id] or [username]).

From

Name: ⓘ

Address: ⓘ

Email

To (Required if used): ⓘ

CC: ⓘ

BCC: ⓘ

Subject: ⓘ

Body: ⓘ

Attachments: ⓘ

Send email in: Text ⓘ

Figure 132: Email sub-tab Pending payment on manual renewal trigger

Automatic Renewal Email

Name, Address, To, CC, BCC, Subject, and Body can use CB field substitutions (e.g. [user_id] or [username]).

From

Name: ⓘ

Address: ⓘ

Email

To (Required if used): ⓘ

CC: ⓘ

BCC: ⓘ

Subject: ⓘ

Body: ⓘ

Attachments: ⓘ

Send email in: Text ⓘ

Figure 133: Email sub-tab Automatic Renewal trigger

Expired Email

To, CC, BCC, Subject, and Body can use CB field substitutions (e.g. [user_id] or [username]).

To: ⓘ

CC: ⓘ

BCC: ⓘ

Subject: ⓘ

Body: ⓘ

Attachments: ⓘ

Send email in: Text ⓘ

Figure 134: Email sub-tab Expiration trigger

Deactivation Email

To, CC, BCC, Subject, and Body can use CB field substitutions (e.g. [user_id] or [username]).

To: ⓘ

CC: ⓘ

BCC: ⓘ

Subject: ⓘ

Body: ⓘ

Attachments: ⓘ

Send email in: Text ⓘ

Figure 135: Email sub-tab Deactivation trigger

7.5.6.10 Plans icon area → Integrations Tab → Folder Access sub-tab

The **CBSubs Folder Access** integration plugin (see **Chapter 6.11**) when installed will add this Folder Access sub-tab to the **Plans** icon area Integrations tab. This sub-tab will allow you to specify up to 5 folder paths to for protection.

As illustrated in **Figure 136**, you should first specify a common message to be displayed along with the popup login form that is displayed when an attempt is made to access a protected folder path. The folder path may be a relevant path or a full path. So a path 'myprotected/folder' would be specified for a folder below our CMS website folder and a path '/home/folder' would be an absolute path.

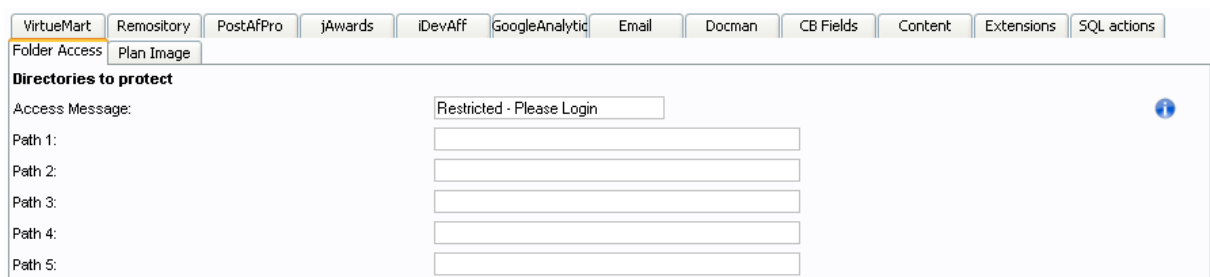


Figure 136: Folder Access sub-tab Configuration

7.5.6.11 Plans icon area → Integrations Tab → Plan Image sub-tab

The **CBSubs Plans Image** integration plugin (see **Chapter 6.12**) when installed will add this Plan Image sub-tab to the **Plans** icon area integrations tab. The plugin will also add a new field-type to our CB Fields Management area. This 'Plan Image' field-type will allow us to specify a CB field and assign it to a **CBSubs™** plan image.

This is illustrated in **Figure 137** where we see the field parameters of a newly created CB field of field-type 'Image Plan'. We can select the **CBSubs™** plan that will provide its image to this field. We can also specify dimension parameters and linking attributes. We can even specify a custom URL link.

Field-specific Parameters

Field

This field type allows users to display their subscription plan as an image such as an award or badge to be used in conjunction with CPay. Select images for each individual plan within CPay from the plans Integrations tab followed by Plan Image tab..

Plans:

--- Select (CTR/CMD-click: multiple) ---
FREE
Paid-A
Paid-B
Paid-C

Image

Controls visual aspects of the images.

Display on profiles as:

CSS class of display:

Height:

Width:

Border:

Image Plan Link:

Image Visibility:

Figure 137: CB Plan Image field parameters

You can then specify a specific image from the drop-down field parameter in the Plan Image sub-tab of the Integrations tab of a plan as illustrated in **Figure 138**.

Presentation Pricing Workflows Access **Integrations**

Integrations settings (if integrating plugins are loaded):

Following CBSubs integration CB plugins are installed but not published:

VirtueMart Remository PostAffPro jAwards iDevAff GoogleAnalytic Email Docman CB Fields Content Extensions SQL actions

Folder Access **Plan Image**

Image associated with this plan:

Image:

Figure 138: Plan Image sub-tab selection

This integration method will permit you to show an image in a CB user profile when the specific user has an active subscription to a plan. This is illustrated in **Figure 139**.



Figure 139: Plan Image in CB User Profile

Warning: The multi-select plans parameter illustrated in **Figure 137** contains the **CBSubs™** plans aliases names. If no alias was given during the plan creation, nothing will appear here! So always make sure you provide a plan alias name when you create a **CBSubs™** plan. See **Chapter 7.5.1** regarding plan aliases.

7.5.6.12 Plans icon area → Integration Tab → AcyMailing sub-tab

This integration plugin (see **Chapter 6.13**) when installed will add a AcyMailing sub-tab to the **Plans** icon area integrations tab. This integration sub-tab will allow us to add and/or remove a user to or from an AcyMailing newsletter list when this user subscribes or ends a subscription to or from a **CBSubs™** plan. The integration plugin will automatically identify all AcyMailing newsletter lists and present them in a multi-select parameter field as illustrated in **Figure 140**.

Subscription Plan

A Subscription Plan includes the settings for that plan, which can be set here.

Name of product:	Testing Workgroup
Type of product:	User Subscription Plan
Subscriptions with this plan:	61
Active subscriptions with this plan:	61
Expired subscriptions with this plan:	0
Subscriptions with this plan that have been upgraded to another plan:	0

Url of plan to display only this plan ("-" to display multiple plans): index.php?option=com_comprofiler&task=pluginclass&plugin=cbpaysubscriptions&do=displayplans&plans=1

Warning: Changing a plan with existing subscriptions will change these subscriptions, except for the current expiry date of active ones. If you need to make changes, it's better to create a new plan, and not allow new subscriptions to the old plan.

Presentation Pricing Workflows Access **Integrations**

Integrations settings (if integrating plugins are loaded):

CB Fields Content Extensions Docman Email SQL actions **AcyMailing** Plan Image

Activation / Renewal / Upgrade

Lists: 3P Developer Workgroup
Language Workgroup
CB Test Workgroup
Newsletters

Remove on plan deactivation: Yes

Deactivation / Cancellation / Expiration

Lists: 3P Developer Workgroup
Language Workgroup
CB Test Workgroup
Newsletters

Remove on plan activation: No

Figure 140: AcyMailing Integration sub-tab

7.5.6.13 Plans icon area → Integrations Tab → jAwards sub-tab

The *Error! Reference source not found.* integration plugin (see **Chapter Error! Reference source not found.**) when installed will add this jAwards sub-tab to the **Plans** icon area integrations tab. This integration sub-tab will allow us to award one or more jAwards medals/awards to users when they subscribe to a plan and remove these upon plan expiration. This is illustrated in **Figure 141**.

Presentation Pricing Workflows Access **Integrations**

Integrations settings (if integrating plugins are loaded):

Following CBSubs integration CB plugins are installed but not published:

VirtueMart Remository PostAffPro **jAwards** iDevAff GoogleAnalytic Email Docman CB Fields Content Extensions SQL actions

Folder Access Plan Image

jAwards awards of user given on plan activation and deactivation:

Awards: ... Select (CTR/CMD-click: multiple) ...
medal

Remove awards on plan deactivation: Yes

Figure 141: jAwards Integration sub-tab

7.5.6.14 Plans icon area → Integrations Tab → Google Analytics sub-tab

The **CBSubs GoogleAnalytics** integration plugin (see **Chapter 6.6**) when installed will add this GoogleAnalytics sub-tab to the **Plans** icon area Integrations tab. This sub-tab has no functionality and it will just refer you back to the **Settings** icon area to configure the global integration parameters for GoogleAnalytics (see **Chapter 7.3.8.4**).

7.5.6.15 Plans icon area → Integrations Tab → Piwik sub-tab

The **CBSubs Piwik** integration plugin (see **Chapter 6.7**) when installed will add this Piwik sub-tab to the **Plans** icon area Integrations tab. This sub-tab allows you to link specific Piwik goal ids to your **CBSubs™** Plan. You can link up to 5 goals per plan as illustrated in Figure 142.

The screenshot shows the 'Integrations' tab selected in the top navigation bar. Below it, the 'Piwik' sub-tab is active. The main content area is titled 'Piwik tracking on payments: here you can setup your analytics tracking plan settings.' Under the 'Goals' section, there are five rows, each labeled 'Goal 1' through 'Goal 5'. Each row contains a 'Goal ID:' label followed by a text input field and a blue information icon. At the bottom, there is a section for 'Piwik general settings:' with a note stating 'Settings are done from within the paid subscriptions plugin in the general settings.'

Figure 142: Piwik Integration Sub-tab

You also need to visit the **Settings** icon area to configure the global integration parameters for Piwik (see **Chapter 7.3.8.5**).

7.5.6.16 Plans icon area → Integrations Tab → URL sub-tab

The **CBSubs URL** Integration plugin (see **Chapter 6.9**) when installed will add an URL sub-tab to the **Plans** icon area Integration tab. The purpose of this sub-tab is to use **CBSubs™** plan membership activity triggers to execute various URL initiated scripts. The related sub-tab is illustrated in **Figure 143**.

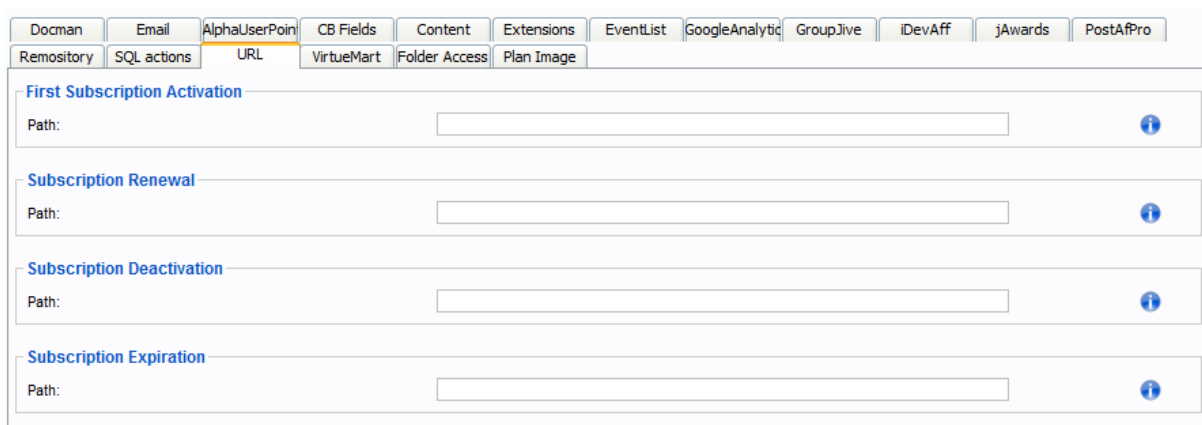
The screenshot shows the 'URL' sub-tab within the 'Integrations' section of the 'Plans' icon area. At the top, there is a horizontal menu with various integration options: Docman, Email, AlphaUserPoint, CB Fields, Content, Extensions, EventList, GoogleAnalytic, GroupJive, iDevAff, jAwards, PostAffPro, Remository, SQL actions, URL (selected), VirtueMart, Folder Access, and Plan Image. Below the menu, there are four distinct sections, each with a title and a 'Path:' label followed by a text input field and an information icon (i). The sections are: 'First Subscription Activation', 'Subscription Renewal', 'Subscription Deactivation', and 'Subscription Expiration'.

Figure 143: URL Integrations sub-tab

As you can see in this figure, there are 4 **CBSubs™** subscription related activities that can trigger URL calls. These are:

- **First Subscription Activation**

This activity takes place when a CB user is activated the very first time in the **CBSubs™** plan.

- **Subscription Renewal**

This activity takes place when a subscriber renews his/her **CBSubs™** plan subscription

- **Subscription Deactivation**

This activity takes place when a subscriber deactivates his subscription to this **CBSubs™** plan

- **Subscription Expiration**

This activity takes place when a subscription to this **CBSubs™** plan expires

These URL calls can use CB field substitution variables to pass needed information to the external script as illustrated in the following example:


```
http://www.mysite.com/myscript.php?username=[username]&user_id=[user_id]&action=new
```

This is a very powerful feature that can be used to integrate external systems with **CBSubs™**. Some use cases that come to mind are: integration with external email autoresponder system (passing email information), external accounting package, etc.

7.5.6.17 Plans icon area → Integrations Tab → GroupJive sub-tab

The **CBSubs GroupJive** Integration plugin (see **Chapter 6.8**) when installed will add this GroupJive sub-tab to the **Plans** icon area Integrations tab. The purpose of this sub-tab is to automatically assign/revoke users to/from GroupJive groups upon plan subscription/deactivation. It can also be used to automatically create new groups and new categories.

The main integration interface is illustrated in Figure 144 where we see 5 auto action framed areas as place-holders.

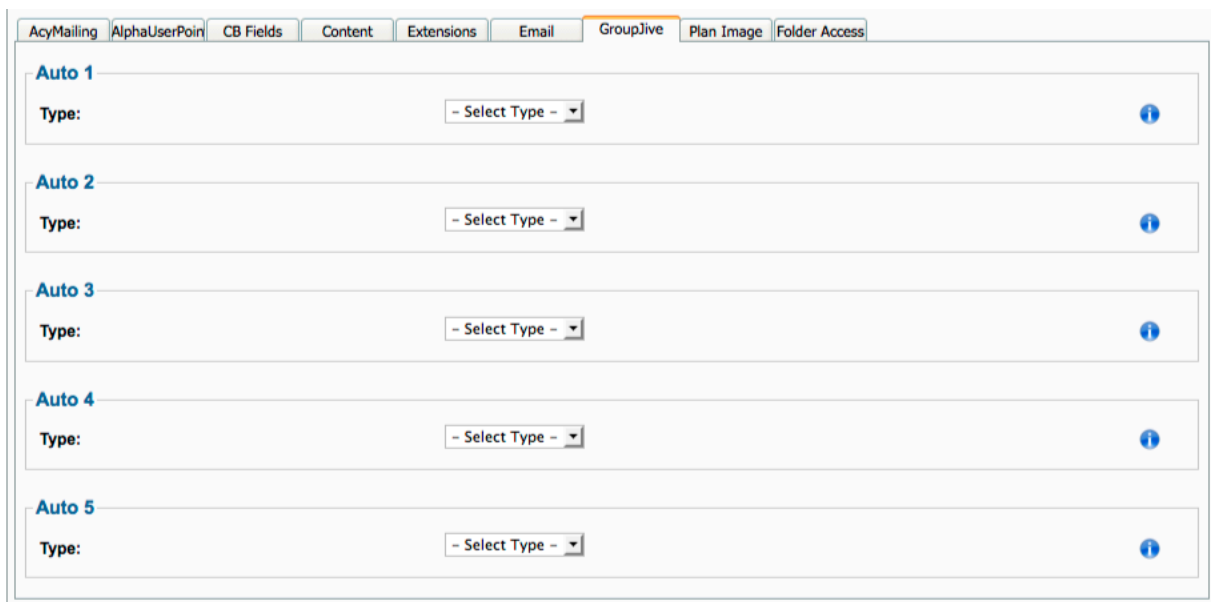
The screenshot shows the 'GroupJive' sub-tab within the 'Integrations' section of the 'Plans' icon area. The interface features a horizontal tab bar at the top with the following tabs: 'AcyMailing', 'AlphaUserPoint', 'CB Fields', 'Content', 'Extensions', 'Email', 'GroupJive' (which is currently selected and highlighted in orange), 'Plan Image', and 'Folder Access'. Below the tab bar, there are five vertically stacked, light gray rectangular boxes, each representing an 'Auto' action. Each box is labeled 'Auto 1' through 'Auto 5' in blue text at the top left. Inside each box, the word 'Type:' is followed by a dropdown menu that currently displays '- Select Type -'. To the right of each dropdown menu is a small blue circular icon with a white lowercase 'i' inside, likely representing an information or help button. The entire interface is enclosed in a thin gray border.

Figure 144: GroupJive Integration tab in CBSubs plan

Figure 145 and Figure 146 illustrate two auto action examples to join a user to a specific group upon subscription activation and to create a new group for a subscriber.

The 'Auto 1' configuration form includes the following fields and options:

- Type:** Join Groups
- Groups:** A dropdown menu showing '- Select Groups -', 'Country', and 'Greece'.
- Status:** Active
- Remove:** Yes

Each field has an information icon (i) to its right.

Figure 145: Auto action to add subscriber to specific GroupJive group

The 'Auto 2' configuration form includes the following fields and options:

- Type:** New Group
- Category:** Personal
- Name:** [username]
- Description:** This group is an invite only group for [name].
- Type:** Approval
- Unique:** Yes
- Remove:** No

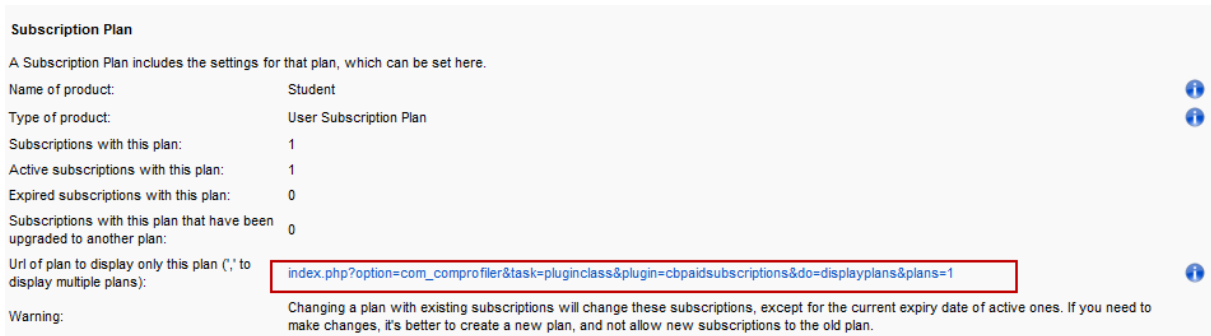
Each field has an information icon (i) to its right.

Figure 146: Auto action to create a new GroupJive group for a subscriber

7.5.6.18 CBSubs™ Plan URL

Once you create and finish configuring a **CBSubs™** Plan and have saved it at least once, you will notice some extra messages that are displayed when you edit the plan.

You will see a URL that can be used to directly take you to the registration/upgrade area for the specific plan. This URL message that appears when editing a saved **CBSubs™** plan is illustrated in **Figure 147**.



The screenshot shows a web interface for configuring a subscription plan. It includes a title 'Subscription Plan', a description, and several fields for plan details. The 'Uri of plan to display only this plan' field is highlighted with a red box, showing a URL. A warning message is displayed at the bottom.

Subscription Plan

A Subscription Plan includes the settings for that plan, which can be set here.

Name of product: Student

Type of product: User Subscription Plan

Subscriptions with this plan: 1

Active subscriptions with this plan: 1

Expired subscriptions with this plan: 0

Subscriptions with this plan that have been upgraded to another plan: 0

Uri of plan to display only this plan (',' to display multiple plans): `index.php?option=com_comprofiler&task=pluginclass&plugin=cbsubscriptions&do=displayplans&plans=1`

Warning: Changing a plan with existing subscriptions will change these subscriptions, except for the current expiry date of active ones. If you need to make changes, it's better to create a new plan, and not allow new subscriptions to the old plan.

Figure 147: CBSubs™ plan URL

You can also reach multiple **CBSubs™** subscription plans by adding more planid's to the end of this URL. Just use the '-' (dash) character as a planid separator.

You can place the 's' character after the planid to indicate that this plan should be preselected.

7.5.6.19 Merchandise Plans

A **CBSubs™** Merchandise plan differs from a User subscription plan mainly in that there is no validity attribute for the merchandise plan. Also merchandise plans can be purchased many times (like purchasing merchandise items). You will be able to see specific use cases that take advantage of this type of plan in **Chapter 14**.

7.5.6.20 Donation Plans

A **CBSubs™** Donation plan is similar in many ways to a Merchandise plan with the main difference that a donation amount can be selected from the purchaser.

7.5.7 How to configure Plans to support business logic

Ok, time for a reality check. You have been bombarded with parameters, tabs, sub-tabs, integration options, settings and so on. How can all of this be used to support business logic? Which parameters support which functionality?

Some important concepts and terminology which might not have been properly clarified in the previous sections are presented in the following bullet list:

- **CBSubs™** subscription plans have a validity period (could be lifetime) and a price (could be free)
- **CBSubs™** merchandise or donation plans don't have a validity period, but do have a price
- Plans can be children or parent level plans. Only one level is permitted.
- Two plans of the same level with their Exclusive parameter set to Yes (see **Chapter 7.5.1**) cannot be subscribed to at the same time. The user will see such plans presented in a radio select list on registration form (if plans are marked to be presented during registration) or on subscription tab in user profile.
- If plans of the same level are marked as "Exclusive", then it is mandatory that users be subscribed to one of these plans at any given time.
- Two plans of the same level with their Exclusive parameter set to No, may be subscribed to at the same time. The user will see such plans presented in a check-box select list where more than one check mark is permitted.

7.5.8 Working with Rounded Template

The **CBSubs™** product as of version 1.1 supports templates. The distribution package has included a ***rounded*** template package that can be installed as described in **Chapter 6.14**. This included template can be used as a basis and guideline for designers wishing to apply other themes to CBSubs to alter the appearance of CBSubs™ output on the registration page and on the subscription tab.

The default template available in **CBSubs™** will generate a CB registration page like the one illustrated in **Figure 148**.

Registration

Required field | Field visible on your profile | Field not visible on profile | Information: Point mouse to icon

Subscription Plan:

☐ **1329 Plan A**
First month free then monthly fee
1 month for Free, then USD 10.00 per month.

☒ **1329 Plan B**
simply 10 per month
1 month for USD 10.00.

First Name: Required field | Field visible on your profile

Last Name: Required field | Field visible on your profile

Email: Required field | Field visible on your profile

Username: Required field | Field visible on your profile

Password: Required field | Field visible on your profile

Verify Password: Required field | Field visible on your profile

Test Text: Field visible on your profile

Test Delimiter: This is a test!

REGISTER

Required field | Field visible on your profile | Field not visible on profile | Information: Point mouse to icon

Figure 148: CBSubs registration using default template


The **CBSubs™** ***rounded*** template package when installed, published and configured in the two **CBSubs™** plans (see **Figure 150** and **Figure 151**) will generate the registration page illustrated in **Figure 149**.


Home » Registration

Registration

🔴 Required field | 🟢 Field visible on your profile | 🔴 Field not visible on profile | ⓘ Information: Point mouse to icon

Subscription Plan:

**1329 Plan A**
First month free then monthly fee
🔴 1 month for Free, then USD 10.00 per month.

**1329 Plan B**
simply 10 per month
🔴 1 month for USD 10.00.

First Name:

Last Name:

Email:

Username:

Password:

Verify Password:

Test Text:

Test Delimiter: This is a test!

REGISTER




🔴 Required field | 🟢 Field visible on your profile | 🔴 Field not visible on profile | ⓘ Information: Point mouse to icon

Figure 149: CBSubs™ registration page using rounded template

Template / CSS

Template for displaying this plan:

Specific settings for the Rounded template



Icon: ☐ None ☐ Yellow ☐ Green ☒ Blue




CSS class (e.g. 'cbreg_green cbreg_admin_green'):

Figure 150: CBSubs™ plan configuration to use blue icon on rounded template

Template / CSS

Template for displaying this plan:

Specific settings for the Rounded template



Icon: ☐ None ☐ Yellow ☒ Green ☐ Blue

CSS class (e.g. 'cbreg_green cbreg_admin_green'):

Figure 151: CBSubs™ plan configuration to use green icon on rounded template

As you can see the results are impressive and CSS designers can take advantage of this new feature to create their own themes.

7.6 Subscription icon area



The **Subscriptions** icon area of the **CBSubs™** system is where the tracking of your subscriptions takes place. This area will display all subscriptions as they are initiated and as they expire or give their place to new or upgrade plans. Every subscription activity will be tracked in this area. The icon immediately gives

us an overview of the current situation in terms of number of active subscriptions versus number of active registrations.

Clicking on the **CBSubs™ Subscriptions** icon will reveal the **CBSubs™ Subscriptions Summary** page as illustrated in **Figure 152**. From this summary page you can easily see the latest activities regarding our subscription events. By default the summary page presents new events first and displays them in descending date order 10 items (configurable) at a time. You can easily navigate through these items by selecting Next, Previous links in the lower part of the summary page.

Subscriptions

A Subscription of a user to a plan includes the details of that subscription of that user for that plan, which can be seen here.

Subscriptions Filter: Plan: By plan: Subscription Status: By status:

#	Username	Full name	Plan name	Replaces subscription	Replaced by subscription	Subscription date	Last renewal date	Expiration date	Status	Change Logs	Autorenew Type	Autorecurring Type	Recurrings used	Maximum recurrings	Payment basket id	IP address	Id
1	fenia	Fenia A	Club Plan A	---	---	01/11/2009 17:17:05	01/11/2009 17:17:05	01/11/2009 18:34:47	Expired	3	Manual	Not autorecurring	1	unlimited	9	91.132.157.224	20
2	nant	Nick A	Club Plan A	17	---	01/10/2009 23:09:44	01/10/2009 23:09:44		Registered Unpaid	1	Manual	Not autorecurring	0	unlimited	7	91.132.157.224	18
3	nant	Nick A	Free CBADDONS Plan	---	18	01/10/2009 23:07:58	01/10/2009 23:07:58		Active	2	Manual	Not autorecurring	1	unlimited	---	91.132.157.224	17
4	NoXstar	NoXstar	Free CBADDONS Plan	---	---	01/06/2009 00:00:00	01/06/2009 00:00:00		Active	2	Manual	Not autorecurring	1	unlimited	---	91.132.157.224	15
5	paulina	Paulina Antimislaris	Club Plan A	13	---	01/03/2009 23:20:19	01/03/2009 23:20:19	01/11/2009 00:24:37	Expired	9	Manual	Not autorecurring	4	unlimited	3	91.132.157.224	14
6	paulina	Paulina Antimislaris	Free CBADDONS Plan	---	14	01/03/2009 23:14:19	01/03/2009 23:14:19		Active	10	Manual	Not autorecurring	0	unlimited	---	91.132.157.224	13

Display # 10 << Start < Prev 1 Next > End >> Results 1 - 6 of total 6

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Figure 152: CBSubs™ Subscriptions Summary Page

Each row of the **CBSubs™ Subscriptions Summary** page contains the following information columns:

- **Username**
This column contains the CMS 'username' of the subscriber (e.g., jdoe).
- **Full name**
This column contains the 'Full name' of the subscriber (e.g., John Doe).
- **Plan name**
The Plan name of the subscription (e.g., Plan A).
- **Replaces subscription**
The 'id' of the subscription that this subscription is replacing.
- **Replaced by subscription**
The 'id' of the subscription that replaced this subscription.
- **Subscription date**
The date this subscription started.
- **Last renewal date**
The last renewal date of this subscription.
- **Expiration date**
The expiration date of this subscription
- **Status**
The current status of this subscription.
- **Change Logs**
The 'Change Logs' column contains the number (count) of change events that are related with this subscription. The number is clickable and will take us to the **CBSubs™ History Logs** icon area (see **Chapter 7.15**) and apply the appropriate filter in order to present these subscription specific events.
- **Autorenew type**
Information if the subscription auto-renewed itself (ARB Auto-renew-billing). Possible values include 'Mandatory', 'Manual', etc.
- **Autorecurring type**
Information if the subscription auto-renewed itself (ARB Auto-renew-billing). Possible values include 'Not auto-recurring', 'Auto-recurring with notifications', etc.
- **Recurings used**
The number of times this subscriber has renewed this specific subscription.

- **Maximum recurrings**

The total number of regular recurrings which can be used (excluding different first period). Also can see 'Unlimited' as a value here.

- **Payment basket id**

This is the 'id' of the payment basket used to pay for this subscription. It is clickable and will take us to the specific basket.

- **IP address**

The IP address of the person that subscribed.

- **Id**

An 'Id' number given to this subscription. It is clickable and will reveal the 'Subscription Edit' page.

Clicking on the last column of a subscription summary row (the Id number URL) will reveal additional information about this specific subscription and will even permit you to alter this information as illustrated in **Figure 153**. Alteration of this data may cause many unforeseeable consequences and should be avoided if you do not know exactly what you are doing. You should test first to make sure that any changes you make do not interfere with the integrity of the system.

Figure 153: CBSubs™ Subscription Edit Page

7.7 Baskets icon area



The **CBSubs™ Baskets** icon area is used to track all payment baskets. A basket is an order issued by **CBSubs™** that needs to be managed. The **Baskets** icon gives direct and continuous feedback regarding the number of completed payments and the number of pending payments. Clicking on the **Baskets** icon will take us to the Baskets summary page as illustrated in **Figure 154**.

CB Paid Subscriptions: Baskets

Baskets
A Payment basket is an invoice to the user, which status and content can be seen here.

Payment Baskets Filter: Subscriptions Plan: --- By plan ---

Payments
 Currency: --- currency ---
 Gross amount: --- gross amount ---
 Gateway account: --- gateway account ---
 Payment using: --- payment using ---
 Payment type: --- payment type ---
 Payment status: --- payment status ---
 Country: --- country ---
 Taxed: --- Tax status ---

Date and time
 By date and time of completed payment:
 From: --- - - -
 Up to: --- - - -
 Period: --- Turnover in last ---

#	<input type="checkbox"/>	Username	Full name	Currency	Amount: single	first	recurring	Invoice	Gateway account	Status	Initiated on	Completed on	IP address	Items	Payments	Notifications	Change Logs	Owner	Id	Business
1	<input type="checkbox"/>	JimE		EUR		-	-	View		Not initiated	2013-07-12 17:04:05		75.53.33.245	Professional for JimE	---	---	1	System	78800	-
2	<input type="checkbox"/>	summytinc		USD		-	-	View		Not initiated	2013-07-12 16:13:23		24.22.194.141	Flexistrap Template for summytinc	---	---	3	System	78799	-
3	<input type="checkbox"/>	markhobbs		USD		-	-	View	Paypal	Completed	2013-07-12 13:59:56	2013-07-12 14:03:53	66.66.148.104	Professional for markhobbs	1	1	5	System	78796	-
4	<input type="checkbox"/>	novack		EUR	119	-	-	View		Not initiated	2013-07-12 13:15:11		41.207.218.252	Professional for novack	---	---	1	System	78798	-
5	<input type="checkbox"/>	marha ijaz		EUR	79	-	-	View		Not initiated	2013-07-12 13:13:33		182.178.180.26	Advanced for marha ijaz	---	---	1	System	78797	-

Display # 5 << Start < Prev 1 2 3 4 5 6 7 8 9 10 ... 7023 Next > End >> Results 1 - 5 of total 35115

Total payments completed with criterias above
 This is the total of payments completed, converted into main currency at current currency exchange rates.
Paid baskets:
 Amount: ---
 Currency of total: EUR
 Total payment amount received: ---
 Show invoices: [View all Completed invoices](#)

Total payments pending completion with criterias above
 This is the total of payments pending completion, converted into main currency at current currency exchange rates.
Pending baskets:
 Amount: ---
 Currency of total: EUR
 Total payment amount pending: ---
 Show invoices: [View all Pending invoices](#)

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Figure 154: Basket Summary Panel View

Basket entries are displayed in order to show baskets with most recent activity first. Each basket is presented as a single row in the Baskets page. Each basket contains the following information columns:

- **Username**

This column contains the username of the basket initiator. It is a clickable link that will take you to the donors profile as displayed in the CB User Management backend.

- **Full name**

This column contains the full name of the basket initiator. It is also a clickable link that takes you to the relevant CB User Management record.

- **Currency**

The currency used for payments of this basket. The currency name (e.g., USD) is actually clickable and will popup the invoice for this payment basket.

- **Amount: Single**

The single (lump sum) amount associated with this basket

- **first**

The first up front amount in case of recurring payments against this basket

- **recurring**

The recurring amounts against this basket

- **Invoice**

This has the View button that can be used to popup the invoice of the basket.

- **Status**

The status of this basket. The following status states are possible (mostly for PayPal): Not initiated, Pending, Completed, Processed, Denied, Refunded, Unsubscribed, Registration cancelled, Cancelled Reversal, Expired, Failed, Voided, Reversed, Partially refunded, In progress.

- **Initiated on**

Date of payment initiation

- **Completed on**

Date of payment completion

- **IP address**

IP address at payment time

- **Items**

The plan items in the basket

- **Payments**

The number of payments for this basket. This number is clickable and when selected will take us to the **Payments** icon area filtered for these payments

- **Notifications**

The number of notifications for this basket. This number is clickable and when selected will take us to the **Notifications** icon area filtered for these notification events.

- **Change Logs**

This column contains the number of changes logged for this basket. It is a clickable link that takes us to the History and Logs area with the appropriate filtering in order to display the relevant logged events.

- **Owner**

The owner of this (usually System).

- **Id**

The id of the basket. You will see that id's are generated in a sequential fashion.

Note: A payment basket is considered as abandoned if items have been selected for purchase and an invoice is displayed but the actual payment process has not been initiated (with payment organization). Abandoned baskets will expire based on the configuration parameters that have been specified in the CBSubs™ → Settings → Display → Baskets page as described in **Chapter 7.3.2.2**.

From the Basket icon area summary page, you can view individual invoices by clicking on the View button as illustrated in Figure 155.

#	<input type="checkbox"/>	Username	Full name	Currency	Amount: single	first	recurring	Invoice	Gateway account	Status	Initiated on	Completed on	IP address	Items	Payments
1	<input type="checkbox"/>	JimE		EUR		-	-	View		Not initiated Pay	2013-07-12 17:04:05		75.53.33.245	Professional for JimE	---
2	<input type="checkbox"/>	summytinc		USD		-	-	View		Not initiated Pay	2013-07-12 16:13:23		24.22.194.141	Flexistrap Template for summytinc	---
3	<input type="checkbox"/>	markhobbs		USD		-	-	View	Paypal	Completed	2013-07-12 13:59:56	2013-07-12 14:03:53	66.66.148.104	Professional for markhobbs	1
4	<input type="checkbox"/>	novack		EUR	119	-	-	View		Not initiated Pay	2013-07-12 13:15:11		41.207.218.252	Professional for novack	---
5	<input type="checkbox"/>	maraha ijaz		EUR	79	-	-	View		Not initiated Pay	2013-07-12 13:13:33		182.178.180.26	Advanced for maraha ijaz	---

Figure 155: Basket Invoice View button

This will trigger a pop-up window that displays the individual invoice as illustrated inb Figure 156.

Joomla 2.5.3 Test site

http://[REDACTED]

your address
your town / country
BestSite
Address
Town
VAT id #:

Date: 03/28/2012

Nicholas A.

Invoice N1484065783305375

Pos.	Qty.	Art. Num.	Item	Price
1	1	S12-74-3	Subscription Plan: Advanced Plan+ for nicholas	USD 10.00 per 2 weeks.
Total per payment				USD 10.00

Payment method: instant

Terms and conditions:
Use of our website and of any purchase is subject to our general conditions available on this website
[REDACTED]

[PRINT](#)

[CLOSE](#)

Figure 156: Invoice pop-up from Basket icon area

You can also quickly see all the Completed or Pending invoices shown on your Basket icon area summary page (filtering supported), by clicking on the View all Completed Invoices or the View all Pending Invoices buttons as illustrated in Figure 157.

Total payments completed with criterias above
This is the total of payments completed, converted into main currency at current currency exchange rates.

Paid baskets:

Amount

Currency of total: EUR

Total payment amount received:

Show invoices: [View all Completed invoices](#)

Total payments pending completion with criterias above
This is the total of payments pending completion, converted into main currency at current currency exchange rates.

Pending baskets:

Amount

Currency of total: EUR

Total payment amount pending: -

Show invoices: [View all Pending invoices](#)

Figure 157: View all Completed or Pending Invoices in Basket icon area

All baskets that do not have a 'Completed' status (see Status column) have a Pay button that can be used to record offline payments received by user. This is illustrated in Figure 158.

first	recurring	Invoice	Gateway account	Status	Initiated on	Completed on
-	-	View		Not initiated Pay	2012-04-06 07:22:00	
-	-	View		Not initiated Pay	2012-04-06 02:08:07	
-	-	View		Not initiated Pay	2012-04-06 01:38:45	

Figure 158: Pay button for Not Initiated baskets

This is especially useful for Membership clubs that need to record offline payments received by their members.

7.8 Payments icon area



The **CBSubs™ Payments** icon area is used to track all payments. The **Payments** icon gives direct and continuous feedback regarding the total number of completed payments and the number of payments made in the last 7 days.

Clicking on the **Payments** icon will take us to the Payments summary page as illustrated in **Figure 159**.

User Management | Tab Management | Field Management | List Management | Plugin Management | Tools | Configuration

CB Paid Subscriptions: Payments

Payments

A Payment is a payment confirmed by the payment processor.

Payments Filter: Gateway account: Payment method: Payment status: New registrations only:

#	<input type="checkbox"/>	Username	Full name	Currency	Amount: single	first	recurring	Payment method	Status	Paid on	Created on	Modified on	Item number	Payment basket	New Registrations	Upgrades	Renewals	Notifications	Change Logs	Id
1	<input type="checkbox"/>	Paulina	Paulina Antimisiaris	USD	10.00	-	-	Dummy test-gateway	Completed	04/04/2009 18:30:31	04/04/2009 18:30:31		D3-65-2	3	0	1	0	1	1	3
2	<input type="checkbox"/>	Paulina	Paulina Antimisiaris	USD	10.00	-	-	Dummy test-gateway	Completed	04/04/2009 18:12:45	04/04/2009 18:12:45		D2-65-2	2	0	1	0	1	1	2
3	<input type="checkbox"/>	Paulina	Paulina Antimisiaris	USD	10.00	-	-	Dummy test-gateway	Completed	04/04/2009 18:11:28	04/04/2009 18:11:28		D1-65-2	1	0	1	0	1	1	1

Display # 15 << Start < Prev 1 Next > End >> Results 1 - 3 of total 3

Total payments completed with criterias above

This is the total of payments completed, converted into main currency at current currency exchange rates.

Payments: 3

Amount

Currency of total: USD

Total payment amount received: 30.00

Total payments pending completion with criterias above

This is the total of payments pending completion, converted into main currency at current currency exchange rates.

Pending payments: ---

Amount

Currency of total: USD

Total payment amount pending: -

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Figure 159: Payment Summary Panel View

Payment entries are displayed in order to show most recent activity first. Each payment is presented as a single row in the Payments page. Each payment contains the following information columns:

- Username**

This column contains the username of the payment initiator. It is a clickable link that will take you to the donators profile as displayed in the CB User Management backend.

- **Full name**
This column contains the full name of the payment initiator. It is also a clickable link that takes you to the relevant CB User Management record.
- **Currency**
The currency used for payment.
- **Amount: Single**
The single (lump sum) amount associated with this payment
- **first**
The first up front amount in case of recurring payments
- **recurring**
The recurring amount
- **Payment method**
The payment method used (actually the gateway type).
- **Status**
The status of this payment. The following status states are possible (mostly for PayPal): Not initiated, Pending, Completed, Processed, Denied, Refunded, Unsubscribed, Registration cancelled, Cancelled Reversal, Expired, Failed, Voided, Reversed, Partially refunded, In progress.
- **Paid on**
Date of payment
- **Created on**
Date of payment creation
- **Modified on**
Date of modification of payment
- **Item number**
The item number of payment. Click to see all payments for the same basket.
- **Payment basket**
Id of payment basket. Click to see actual basket.
- **New registrations**
Total number of new registrations on that day
- **Upgrades**
Total number of upgrades on that day

- **Renewals**

Total number of renewals on that day

- **Notifications**

The number of notifications for this basket. This number is clickable and when selected will take us to the **Notifications** icon area filtered for these notification events.

- **Change Logs**

This column contains the number of changes logged for this payment. It is a clickable link that takes us to the History and Logs area with the appropriate filtering in order to display the relevant logged events.

- **Id**

The id of the payment. You will see that id's are generated in a sequential fashion.

If your payment organization supports remote refunding and your CBSubs™

Payment Gateway has been configured properly, you should see a Refund button in the status column of your Payments as illustrated in Figure 160.




Currency	Amount: single	first	recurring	Payment method	Payment using	Status	Txn id	Sale id	Auth id	Paid on	Item number	Payment basket
USD	10.00	-	-	Paypal	instant	Completed Refund	0US036875R068941F			03/28/2012 00:07:35	S12-74-3	16
USD	10.00	-	-	Paypal	instant	Completed Refund	9WF98358BV840810V			03/27/2012 22:17:51	S11-73-3	15
USD	10.00	-	-	Paypal	instant	Completed Refund	24G44887GV222615X			03/27/2012 22:11:24	S9-72-3	14
USD	10.00	-	-	Paypal	instant	Completed Refund	9R271656G8735030U			03/27/2012 20:55:54	S9-72-3	13
USD	0.01	-	-	Ogone	VISA Credit Card	Completed Refund	14215409	11	test123	03/27/2012 20:52:43	S10-72-2	11
USD	10.00	-	-	Dummy test-gateway	Visa Credit Card	Completed Refund	123			03/27/2012 20:49:42	S9-72-3	10

Figure 160: Refund button for payments

By clicking on such a Refund button you are taken to the refund page for this payment as illustrated in Figure 161.

You need to specify the amount to refund and if its a full/final refund or partial and give a reason.

CB Paid Subscriptions: Edit Refund this Payment manually

RefundBackClose

Refund this Payment manually

This is a refund:

You are about to send back money from your account back to the customer.









Payment details

Payment Id:	14
Invoice number:	N401111683304959
Item number:	S11-73-3

User details

Username:	System
Full name:	System
User Id:	

Payment details of payment to refund

Payment status:	Completed	
Payment date:		
Currency:	US Dollar	
Amount:	10.00000	
Payment method:	Paypal	
Payment type:	instant	
Name of payer:	Test User	
Transaction id:	9WF98358BV840810V	

Details of refund to make





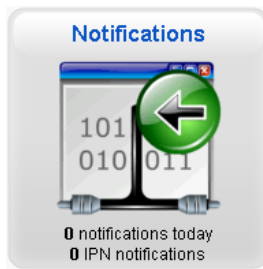
Currency:	US Dollar	
Amount to refund:	<input type="text"/>	
Final or partial refund for this payment:	<div><input type="radio"/> Final and last refund closing this transaction and cancelling products subscriptions</div> <div><input type="radio"/> Partial refund, keeping this transaction open and product subscriptions</div>	
Reason for refund (optional description):	<input type="text"/>	

Figure 161: Refunding a payment

Please note that partial refunds will not revert an active subscription. You need to specify a full/final refund in order to expire/stop a subscription.

7.9 Notifications icon area



The **CBSubs™ Notifications** icon area logs all events that interact with payment organization. Some payment gateways (e.g., PayPal) use an API layer that interacts with end-user systems (like **CBSubs™**) and exchanges many messages to notify end system of progress of transaction.

Notifications
View log of server notifications here, ordered by reverse order of arrival:

Notifications Filter: Gateway account: By gateway account --- Payment method: By payment method --- Payment status: By status ---

#	<input type="checkbox"/>	Log date	Log Type	Verification	Username	Full name	Currency	Amount: single	first	recurring	Gateway account	Payment method	Type	Status	Pending reason	Reason code	Completed on	First name	Last name	Email	Item number
1	<input type="checkbox"/>	04/04/2009 18:30:31	Payment	SIMULATEDOK	paulina	Paulina Antimisiaris	USD	10.00000			Test Gateway	Dummy test-gateway	web_accept	Completed			16:30:31 Apr 04, 2009 EEST	Paulina	Antimisiaris		D3-65-2
2	<input type="checkbox"/>	04/04/2009 18:12:45	Payment	SIMULATEDOK	paulina	Paulina Antimisiaris	USD	10.00000			Test Gateway	Dummy test-gateway	web_accept	Completed			16:12:45 Apr 04, 2009 EEST	Paulina	Antimisiaris		D2-65-2
3	<input type="checkbox"/>	04/04/2009 18:11:28	Payment	SIMULATEDOK	paulina	Paulina Antimisiaris	USD	10.00000			Test Gateway	Dummy test-gateway	web_accept	Completed			16:11:28 Apr 04, 2009 EEST	Paulina	Antimisiaris		D1-65-2

Display # 15 << Start < Prev 1 Next > End >> Results 1 - 3 of total 3

Figure 162: Notification Summary Panel View

Notification entries are displayed in order to show most recent activity first. Each event is presented as a single row in the Notifications page. Each event contains the following information columns:

- **Log date**
Date of logging the notification
- **Log type**
Type of notification and validation (e.g., Payment, PDT, etc.)
- **Verification**
Results of verification at payment processor (e.g., SIMULATEDOK, manual, showslip, etc.)
- **Username**
This column contains the username of the payment initiator. It is a clickable link that will take you to the donors profile as displayed in the CB User Management backend.

- **Full name**
This column contains the full name of the payment initiator. It is also a clickable link that takes you to the relevant CB User Management record.
- **Currency**
The currency used for payment
- **Amount: single**
The one time initial amount paid
- **first**
The first amount followed by recurring payments
- **recurring**
The amount of recurring payment
- **Gateway account**
Gateway account used for payment
- **Payment method**
The method used for payment (off-line, dummy, PayPal, etc.)
- **Type**
The type of transaction
- **Status**
The following status states are possible (mostly for PayPal): Not initiated, Pending, Completed, Processed, Denied, Refunded, Unsubscribed, Registration cancelled, Cancelled Reversal, Expired, Failed, Voided, Reversed, Partially refunded, In progress.
- **Pending reason**
Reason of pending state (if pending)
- **Reason code**
Code of reason of pending state
- **Completed on**
Date of payment completion
- **First name**
First name as stated on payment
- **Last name**
Last name as stated on payment

- **Email**

Email as stated on payment

- **Item number**

Item number of payment. Click to see notifications for same basket.

- **Payment basket**


Id of payment basket. Click to see basket.

7.10 Currencies icon area





You will most likely not be visiting this area often, but it is very impressive. The **CBSubs™** system periodically connects online to get up to date currency exchange rates from the European Central Bank. As you can see from the **Currencies** icon, the lower part of the icon informs us about the last update of the

exchange rates. By clicking on the icon you will be taken to the 'Currencies exchange rates' table as illustrated in **Figure 163**. The Base currency column in this table is the one specified in the **Settings** icon area (see **chapter 7.3.1.4**).

 **CB Paid Subscriptions: Currency exchange rates**

Currency exchange rates
Latest currency exchange rates. If this table is empty, it is because your global settings don't have secondary currencies set.

 **Currency exchange rates** Filter: Name of currency: 

#	<input type="checkbox"/>	Currency ISO code	Currency name	Exchange rate	Base currency	
1	<input type="checkbox"/>	USD	US Dollar	1.40660000	EUR	European Centr
2	<input type="checkbox"/>	JPY	Japan Yen	150.91000000	EUR	European Centr
3	<input type="checkbox"/>	BGN	Lev	1.95580000	EUR	European Centr
4	<input type="checkbox"/>	CZK	Czech Koruna	24.43600000	EUR	European Centr
5	<input type="checkbox"/>	DKK	Danish Krone	7.45610000	EUR	European C
6	<input type="checkbox"/>	EEK	Kroon	15.64660000	EUR	European C
7	<input type="checkbox"/>	GBP	Pound Sterling	0.79620000	EUR	European Centr
8	<input type="checkbox"/>	HUF	Forint	239.60000000	EUR	European C
9	<input type="checkbox"/>	LTL	Lithuanian Litas	3.45280000	EUR	European Centr
10	<input type="checkbox"/>	LVL	Latvian Lats	0.70440000	EUR	European Centr

Display # << Start < Prev 1 2 3 4 Next > End

[CB Paid Subscriptions](#) [User](#) [Comments](#) [Help](#) [Privacy Policy](#) [Terms of Use](#)

Figure 163: Currencies exchange rates

7.11 Statistics icon area



The **Statistics** icon area of **CBSubs™** is available to generate vital statistics regarding your total payments received. The icon itself gives the number of sales during the last 7 days and also the number of sales for the 7-day period before that.

By clicking on the **Statistics** icon we will see that Statistics menu page where currently there are two sets of further statistics icons related to Payments/Transactions totals and Item sales. This is illustrated in **Figure 164**.

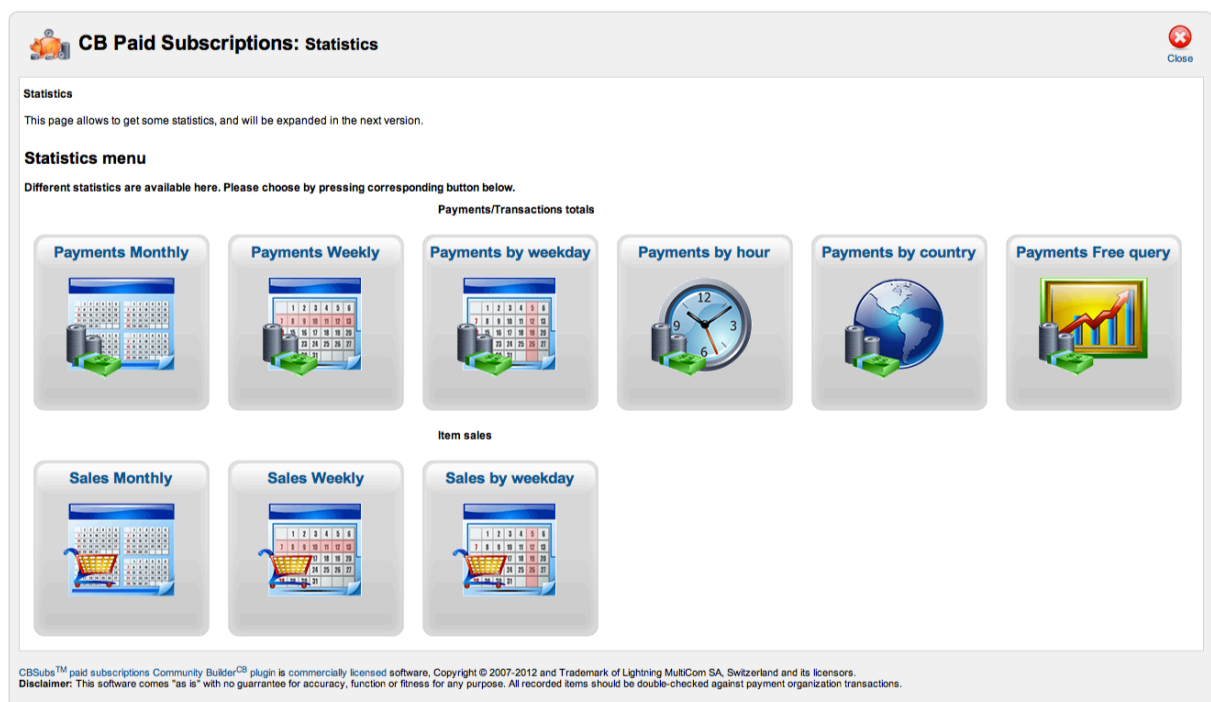


Figure 164: Statistics menu

Each item also has extra filtering possibilities and paging as illustrated by the 'By day of week' choice leading to the '**Statistics by day of week**' page as illustrated in **Figure 165**.

On this page you can specify a time period and filter by currency, gross amount and payment methods to produce a nice graph to see which day of the week is more successful for your specific business.

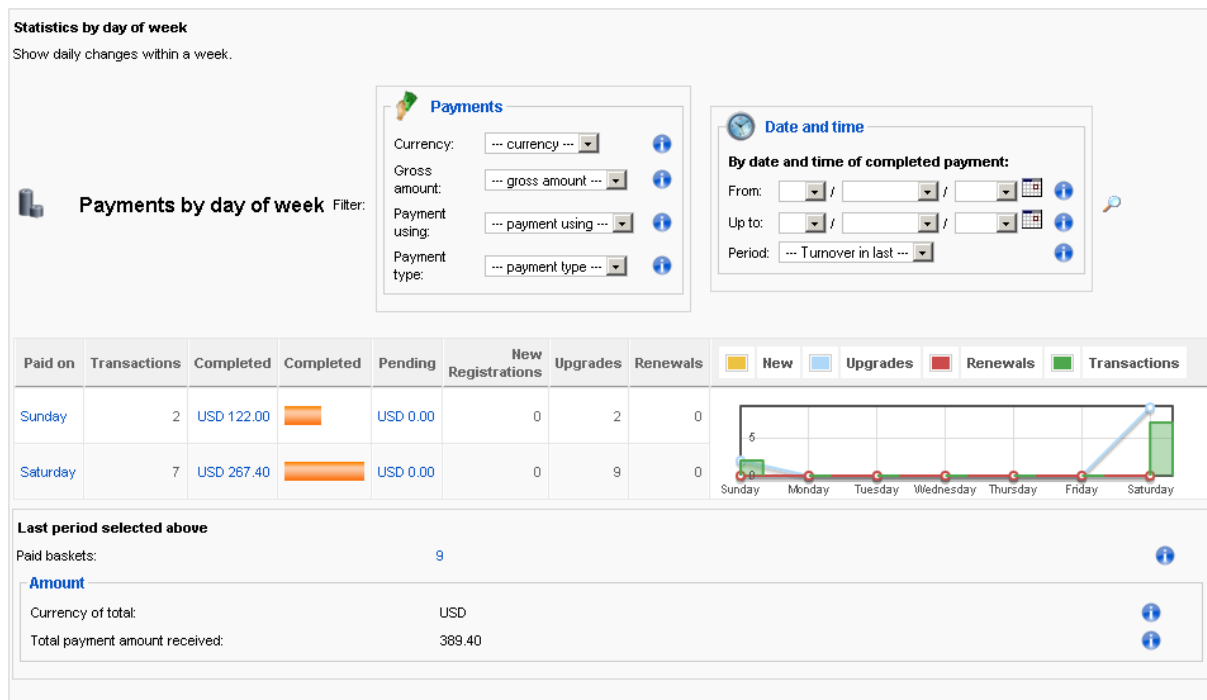


Figure 165: Statistic by day of week page

Feel free to explore the built-in stats functionality.

7.12 Merchandises icon area



As discussed back in **Chapter 7.5**, a **CBSubs™** plan can be created to manage merchandise product types. Events generated for such plans are presented in this icon area. The icon itself always keeps track of the actual number of Merchandise sales received. If you click on the icon you will be presented with the **Merchandises** page that contains more details regarding your merchandise product sales.

The **Merchandises** page presents all sales items received in a LRFD (last received first displayed) fashion as illustrated in **Figure 166**. You can also use the available filters to browse through your merchandises sales

Merchandises

A merchandise bought by a user corresponding to a merchandise product includes the details of that merchandise of that user for that merchandise product, which can be seen here.

Merchandises Filter: Plan: Merchandise Status:

#	<input type="checkbox"/>	Username	Full name	Plan name	Currency	Amount	Acquisition date	Status	Payment basket id	Change Logs	IP address	Id
1	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	Merchandise #001	USD	100.00	05/04/2009 00:25:33	Active	7	2	127.0.0.1	2
2	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	Merchandise #001	USD	100.00	04/04/2009 23:44:43	Active	8	2	127.0.0.1	3
3	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	Merchandise #001	USD	100.00	04/04/2009 20:17:37	Active	6	2	127.0.0.1	1

Display # << Start < Prev 1 Next > End >> Results **1 - 3** of total **3**

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Figure 166: Merchandises icon area

For each merchandise sales event you will be able to see the following information in the form of columns:

- **Username**

This column contains the username of the purchaser. It is a clickable link that will take you to the donators profile as displayed in the CB User Management backend.

- **Full name**

This column contains the full name of the purchaser. It is also a clickable link that takes you to the relevant CB User Management record.

- **Plan name**

This column contains the 'Merchandise' plan name that was used for this purchase. This clickable link will take you to the **CBSubs™ Plan** icon area summary page filtered by this plan.

- **Currency**

The currency used for this purchase.

- **Amount**

The amount received.

- **Acquisition date**

The date/time stamp of the actual sales.

- **Status**

The status of the purchase.

- **Payment basket id**

The payment basket id associated with this purchase.

- **Change Logs**

This column contains the number of changes logged for this purchase. It is a clickable link that takes us to the History and Logs area with the appropriate filtering in order to display the relevant logged events.

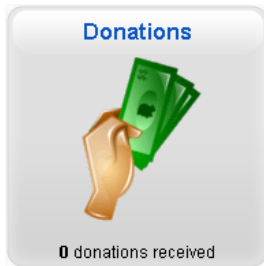
- **IP address**

The IP address used during the sales process.

- **Id**


The id of the purchase. You will see that id's are generated in a sequential fashion. Actually this id number is also a clickable link that will allow you to edit the donation record. This option should not be used unless you are absolutely sure about what you are doing.

7.13 Donations icon area




CBSubs™ plans can also be of product type 'Donation' as discussed back in **Chapter 7.5**. The **Donations** icon area gathers all information related with donation plan activities. All donations are recorded here. If you have prepared **CBSubs™** donation plans, then you will most likely use this panel to track your success in soliciting donations. The icon itself always keeps track of the actual number of donations received. If you click on the icon you will be presented with the **Donations** page that contains more details regarding your donations received.

The Donations page presents all donations received in a LRFD (last received first displayed) fashion as illustrated in **Figure 167**. You can also use the available filters to browse through your donations.


CB Paid Subscriptions: Donations
Close

Donations

A Donation from a user corresponding to a donation product includes the details of that donation of that user for that donation product, which can be seen here.


Donations
Filter: Plan: Donation Status:

#	<input type="checkbox"/>	Username	Full name	Plan name	Currency	Amount	Donation date	Status	Payment basket id	Change Logs	IP address	Id
1	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	Donation Plan 2	USD	22.00	05/04/2009 00:53:43	Active	9	2	127.0.0.1	9
2	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	Donation Plan	USD	10.00	04/04/2009 23:44:43	Active	8	2	127.0.0.1	8
3	<input type="checkbox"/>	rena	Rena Emmanouilidou	Donation Plan	USD	10.00	04/04/2009 20:23:50	Active	---	2	127.0.0.1	7
4	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	Donation Plan	USD	10.00	04/04/2009 20:17:37	Active	6	2	127.0.0.1	6
5	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	Donation Plan	USD	10.00	04/04/2009 20:08:32	Active	5	2	127.0.0.1	5
6	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	Donation Plan	USD	10.00	04/04/2009 20:03:54	Active	4	2	127.0.0.1	4
7	<input type="checkbox"/>	paulina	Paulina Antimisiaris	Donation Plan	USD	10.00	04/04/2009 18:30:31	Active	3	2	127.0.0.1	3
8	<input type="checkbox"/>	paulina	Paulina Antimisiaris	Donation Plan	USD	10.00	04/04/2009 18:12:45	Active	2	2	127.0.0.1	2
9	<input type="checkbox"/>	paulina	Paulina Antimisiaris	Donation Plan	USD	10.00	04/04/2009 18:11:28	Active	1	2	127.0.0.1	1

Display #
<< Start < Prev 1 Next > End >> Results **1 - 9** of total **9**

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Figure 167: Donations icon area

For each donation you will be able to see the following information in the form of columns:

- **Username**
This column contains the username of the donator. It is a clickable link that will take you to the donators profile as displayed in the CB User Management backend.
- **Full name**
This column contains the full name of the donator. It is also a clickable link that takes you to the relevant CB User Management record.
- **Plan name**
This column contains the 'Donation' plan name that was used for this donation. This clickable link will take you to the **CBSubs™ Plan** icon area summary page filtered by this plan.
- **Currency**
The currency used for this donation.
- **Amount**
The amount of the donation received.
- **Donation date**
The date/time stamp of the donation.
- **Status**
The status of the donation.
- **Payment basket id**
The payment basket id associated with this donation.
- **Change Logs**
This column contains the number of changes logged for this donation. It is a clickable link that takes us to the History and Logs area with the appropriate filtering in order to display the relevant logged events.
- **IP address**
The IP address used during the donation process.
- **Id**
The id of the donation. You will see that id's are generated in a sequential fashion. Actually this id number is also a clickable link that will allow you to edit the donation record. This option should not be used unless you are absolutely sure about what you are doing.

7.14 Import icon area



The **Import** icon area of the **CBSubs™** system is where you can bypass (for whatever reason) the payment workflow and batch assign (import) specific website members (based on various criteria) to specific **CBSubs™** subscription plans. There are many methods that can be used to mass assign users to plans – starting from assigning all members of a specific CMS ACL group to a specific plan and ending in using a text file containing the user ids that need to be mass assigned (imported).

The default import form is illustrated in **Figure 168**. However, we will see that this form dynamically transforms itself depending upon selected values of the first ‘**Import users from:**’ drop-down field parameter.

 The screenshot shows a web form titled 'CB Paid Subscriptions: New Import subscriptions'. At the top right are 'Import' and 'Close' buttons. The form is divided into three sections: 'Import Source', 'Import Destination', and 'Import Behavior'.
 - 'Import Source' has a dropdown for 'Import users from:' with the text '--- Choose source ---'.
 - 'Import Destination' has dropdowns for 'Destination Subscription plan:' (text: '--- Choose plan ---'), 'Current state:' (text: '--- Choose subscription state ---'), and a date picker for 'Subscription date:'. The 'Expiration Date:' is noted as being computed automatically.
 - 'Import Behavior' has a dropdown for 'Import:' (text: 'Yes: Import and create subscription records') and a 'Remark:' field with a warning message.
 At the bottom, a small note states: 'CB paid subscriptions plugin is commercial software released to customers only under its commercial license.'

Figure 168: Import Icon Area – default import form

This ‘**Import users from:**’ drop-down field parameter accepts the following values:

- **File (single line of comma separated user-ids)**

This option allows you to specify a filename via a ‘**File (formatted as selected above)**’ filename selection field that appears along with a Browse button. The text file should contain a comma separated list of valid user ids (e.g., 63, 64, etc.) for which subscriptions should be created. The remaining part of the

default form will permit us to chose the '**Subscription plan:**' (generated dynamically from all configured plans – see **chapter 7.5**) that the specified users should be subscribed to, along with the '**Current state:**' (valid states are: Active, Expired, Unsubscribed / Cancelled) and the '**Subscription date:**' (specified by a date picker field).

- **File (each line: userid, planid, status, subscription date)**

This option allows you to specify a filename via a '**File (formatted as selected above)**' filename selection field that appears along with a Browse button. The text file should contain one row for each user with the following comma separated values:

- *userid* (e.g., 63, 65, etc)
- *planid* (to be taken from id column in the **CBSubs™ Plans** Icon area summary page (see **chapter 7.5**)
- *status* (valid states are: A = Active, X = Expired, C= Unsubscribed / Cancelled)
- *subscription date* (e.g., 2009-01-01 00:00:00)

A sample line in this text file could look like:

63,1,A,2009-01-01 00:00:00

- **All users from a given CMS ACL group**

This option allows you to specify via a '**User Group:**' drop-down field parameter one specific CMS ACL group (e.g., Registered, Author, etc.) that contains all the member user-ids that need to be batch assigned to a given subscription specified by a '**Subscription plan:**' drop-down field parameter (automatically populated with all valid subscription plans). You should also specify the state of the subscription via a '**Current status:**' drop-down selectable field parameter (valid values include: Active, Expired, Unsubscribed / Cancelled) and a date stamp configured by a '**Subscription date:**' date selector field parameter.

- **All users from a given subscription plan**

This option allows you to specify via a source '**Subscription plan:**' drop-down selectable field parameter (containing all valid subscription plans) the plan that contains all the member user-ids that need to be batch assign to a given plan specified by a destination '**Subscription plan:**' drop-down field parameter (automatically populated with all valid subscription plans). Once you specify the source 'Subscription plan:' you will need to select the subscription status you are targeting via the '**Status:**' multi-select field that will appear. You should also specify the '**Subscription date:**' value via a date selector field parameter.

All the above options also include an extra 'Import Behavior' section containing one parameter:

- '**Import:**'

Valid options are:

- No: for testing effects only. No changes will be made
- Yes: import and create subscription records

Please note that in all import cases only valid and compatible subscriptions should be made. This means that only actions permissible via the **CBSubs™** user interface respecting the various specified plans along with applicable restrictions should be made. All other requests will be unsuccessful. All **CBSubs™** integration plugins will 'fire' as if the subscriptions were made via the normal user interface subscription process.

7.15 History Logs icon area



The **History Logs** icon area of the **CBSubs™** system contains a detailed log of all error or change events recorded on our **CBSubs™** powered site. This powerful log is very useful when tracking problems and bugs. Hopefully, your **History Logs** icon should always show: '0 error logs today' in its summary line. If at

any point you see errors in this log that are related with the actual **CBSubs™** system, you should report them immediately to the **CBSubs™** team in the relevant Joomlapolis forum area. The '**Maybe a Problem?**' forum area for **CBSubs™** is located at:

http://www.joomlapolis.com/component/option,com_joomlaboard/Itemid,38/func,showcat/catid,94/

but before posting make sure to double check all identified issues in the 'Identified Issues' forum area located at:

http://www.joomlapolis.com/component/option,com_joomlaboard/Itemid,38/func,showcat/catid,91/

A sample summary area of the **CBSubs™ History Logs** icon area is illustrated in **Figure 169**.

CB Paid Subscriptions: History and Logs
Close

History and Logs
 This is the full log of history events, change log, and error log.

History and Logs
Filter:

Type
 By type and changes of event:
 Event type: ⓘ
 Table affected: ⓘ
 Type of change: ⓘ

Date and time
 By date and time of event:
 From: / / ⓘ
 Up to: / / ⓘ
 Period: ⓘ

Priority: ⓘ
 ⓘ

#	<input type="checkbox"/>	Event time	Event type	Message	Table affected	Table Key	Change	Username	Full name	IP Address	Log Priority	Id
1	<input type="checkbox"/>	01/12/2009 20:42:22	Change log	User subscription deactivated with status Cancelled	User subscriptions	13	update	paulina	Paulina Antimisiaris	91.132.157.224	Info	868
2	<input type="checkbox"/>	01/12/2009 20:41:50	Change log	---	Plans	15	update	admin	Administrator	91.132.157.224	Info	867
3	<input type="checkbox"/>	01/12/2009 20:39:35	Change log	---	Plans	15	update	admin	Administrator	91.132.157.224	Info	866
4	<input type="checkbox"/>	01/12/2009 20:34:25	Change log	User subscription activated as Upgrade	User subscriptions	17	update	nant	Nick A	91.132.157.224	Info	865
5	<input type="checkbox"/>	01/12/2009 20:33:38	Change log	---	Plans	15	update	admin	Administrator	91.132.157.224	Info	864
6	<input type="checkbox"/>	01/11/2009 23:33:59	Change log	User subscription deactivated with status Cancelled	User subscriptions	17	update	nant	Nick A	91.132.157.224	Info	863
7	<input type="checkbox"/>	01/11/2009 23:33:40	Change log	---	Plans	15	update	admin	Administrator	91.132.157.224	Info	862
8	<input type="checkbox"/>	01/11/2009 23:30:56	Change log	User subscription activated as Upgrade	User subscriptions	17	update	nant	Nick A	91.132.157.224	Info	861
9	<input type="checkbox"/>	01/11/2009 23:29:46	Change log	User subscription deactivated with status Cancelled	User subscriptions	17	update	nant	Nick A	91.132.157.224	Info	860
10	<input type="checkbox"/>	01/11/2009 23:28:57	Change log	---	Plans	16	update	admin	Administrator	91.132.157.224	Info	859

Display # << Start < Prev 1 2 3 4 5 6 7 8 9 10 ... 87 Next > End >> Results 1 - 10 of total 868

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Figure 169: History Logs icon area - summary view

As you can see from **Figure 169**, there is a very detailed filtering mechanism in place that will allow you to drill down and focus on any event needed. You can filter based on three item groups

The first filter group is related to the type of event logged. The parameters contained in this filter group are:

- **Event type**

Drop-down parameter that takes the following values:

- **Error log**
- **Change log**

- **Table affected**

Drop-down parameter that takes the following values:

- **Payment gateway accounts**
- **Plans**
- **User subscriptions**
- **Payment baskets**
- **Payments**
- **Currencies**
- **Merchandises**
- **Donations**
- **Notifications**

- **Type of change**

Drop-down parameter that takes the following values:

- **Insert**
- **Update**

You can also combine the above with a date group filter to narrow down events that took place during a specific time period.

Finally, you can also filter your events based on the priority logging factor of the event. The priority drop-down filter has the following values: **Emergency, Alert, Critical, Error, Warning, Notice, Info** and **Debug**.

For each event logged you will be able to see the following information in the form of columns:

- **Event time**

This column contains a date/time stamp of the event.

- **Event type**

This column contains the type category of the event. Two event types are logged: **Change log** and **Error log**.

- **Message**

This column contains a brief message regarding the event. The message is also a clickable link will take you to a more detailed description of the event,

- **Table affected**

This column contains the (database) table that was modified by this (change

log) event. Applicable values include: Payment gateway accounts, Plans, User subscriptions, Payment baskets, Payments, Currencies, Merchandises and Notifications.

- **Table key**

This column contains the table key information. It is used for debugging purposes if needed.

- **Change**

This column contains the type of change that has taken place in the event. Typical values include: **update** and **insert**. This item is clickable and will take you to a more detailed description of the event. Also hovering your mouse on this item will popup a table of detailed event characteristics for this event.

- **Username**

This column contains the username of the user involved during this event. It is a clickable item that will take you to the subscription tab of the user in the CB User Management backend.

- **Full name**

This column contains the full name of the user involved during this event. It is a clickable item that will take you to the subscription tab of the user in the CB User Management backend.

- **IP Address**

This column contains the IP address used by the user during this event/

- **Log Priority**

This column contains the log priority posted for this event. Applicable values include: **Emergency**, **Alert**, **Critical**, **Error**, **Warning**, **Notice**, **Info** and **Debug**.

- **Id**

This column contains the unique identifier of this logged event.

The History and Logs feature of **CBSubs™** is an extremely powerful mechanism to help you keep track of all events taking place on your **CBSubs™** powered website. It should be noted that the logging mechanism enabled with **CBSubs™** will also handle **error** and **warning** messages generated by *other* components and scripts present in your website environment.

7.16 Tax Settings icon area



The **Tax settings** icon area of the **CBSubs™** system contains all relevant settings and entities that define how **CBSubs™** should handle sales taxation for purchases made.

The icon when selected will reveal another set of 5 tax related icons that further define appropriate tax related entities as illustrated in **Figure 171**. We see that the actual Tax settings

icon has a summary of the tax rules that have been created and the published tax rates within this icon area (2 tax rules – 1 published tax rates).

We will be describing in detail these sub-icon areas after giving a short overview of the entities involved in the **CBSubs™** taxation system.

7.16.1 Overview

In order to better understand the Tax infrastructure introduces in **CBSubs™** we will provide a high level overview of the entities involved.

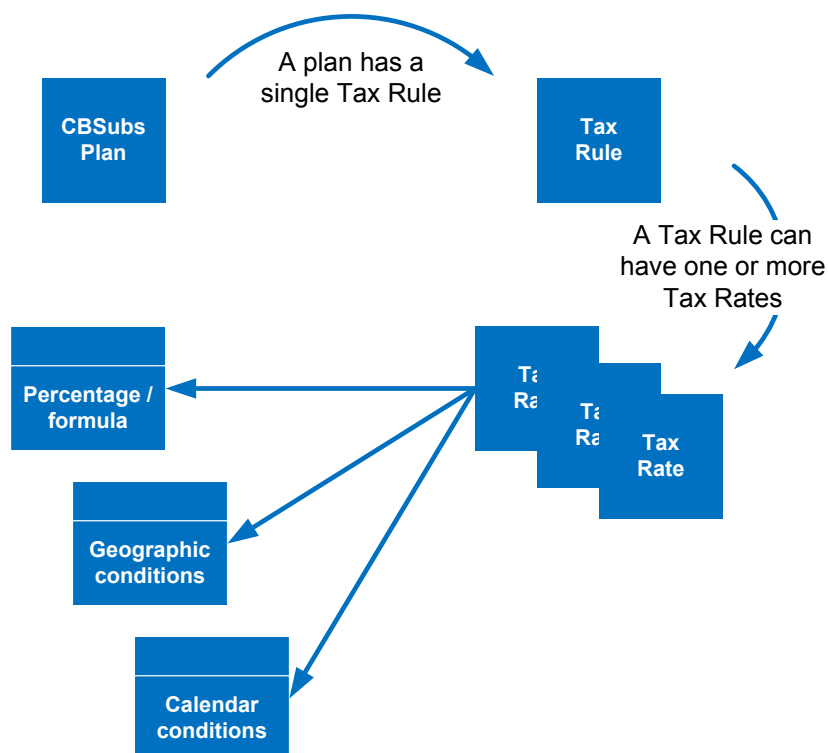


Figure 170: Tax system overview

As illustrated in **Figure 170**, a **CBSubs™** plan has a single '**tax rule**' associated with it (see **Chapter 7.5.3** for tax sub-tab of a **CBSubs™** plan). A tax rule can have one or more tax rate entities associated with it (each rate entity has a priority level that will be used if multiple rates need to be applied for a single rule). And finally a tax rate has three important characteristics: a percentage or other formula to calculate the applicable tax (e.g., 20% of subscription price or step function based on price, etc.); a geographic condition that will be used to determine when the percentage or formula entity is applicable (e.g., tax rate applicable only for EU zone, etc.) and also a calendar validity period for the tax rate (e.g., country has indicated that a rate change will take place at a certain date and thus a calendar period must be associated with two tax rate entities).

7.16.2 Tax Settings Icons

The Tax Settings icon area will reveal 6 sub-icons as illustrated in **Figure 171**.

CB Paid Subscriptions: Sales Tax / VAT Settings and Reports

Sales Tax / VAT Settings and Reports

This page allows to configure general tax-related settings. Each product/plan has also an integrations tab "Tax" for the choice of the Tax Rule to apply to the product. It also allows you to view sales taxes reports by month and to print corresponding invoices.

Tax settings menu

Here is how taxes work:

- a **Product Plan** can get assigned a **Tax Rule**
- a **Tax Rule** can get assigned several **Tax Rates** (e.g. Canada needs multiple ones: country and state taxes apply)
- a **Tax Rate** defines a tax %, and depends on a **Geographic Zone**
- a **Geographic Zone** is comprised of **Geographic Zone Entries**
- a **Geographic Zone Entry** is a **Country** and optionally a **Province/State**

Thus, when a buyer billing address is in a given Geographic Zone which has Tax Rate(s) assigned to a Tax Rule used by a Product Plan, the corresponding invoice item computes the corresponding tax that is added to the invoice.

Tax Rules
1 tax rules

Tax Rates
0 published tax rates

Geographic Zones
3 geographic zones
30 published zones entries

Countries
249 countries defined

States / Provinces
4501 states/provinces defined

Sales Tax / VAT Report

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Figure 171: Tax Settings icon area sub-icons

These icons also follow the logic of the main icon areas as they also provide summary information about their content in the lower part of the icon area. You will

notice that the Countries icon and the States / Provinces icon have been appropriately pre-populated by **CBSubs™**. Of course it is up to the administrator to maintain these entities in case of new country or state information data.

7.16.3 Tax Rules icon



The **Tax Rules** icon area of the **CBSubs™** taxation system by default contains a single tax rule which cannot be removed. The default tax rule is named '**Not subject to sales tax**' and it is applied automatically to all **CBSubs™** plans.

We can see this pre-populated tax rule by selecting the **Tax Rules** icon and reaching the Tax Rules summary page as illustrated in **Figure 172**.

CB Paid Subscriptions: Tax Rules

Tax Rules

Sales Tax rules settings.

Tax Rules Filter:

Create New

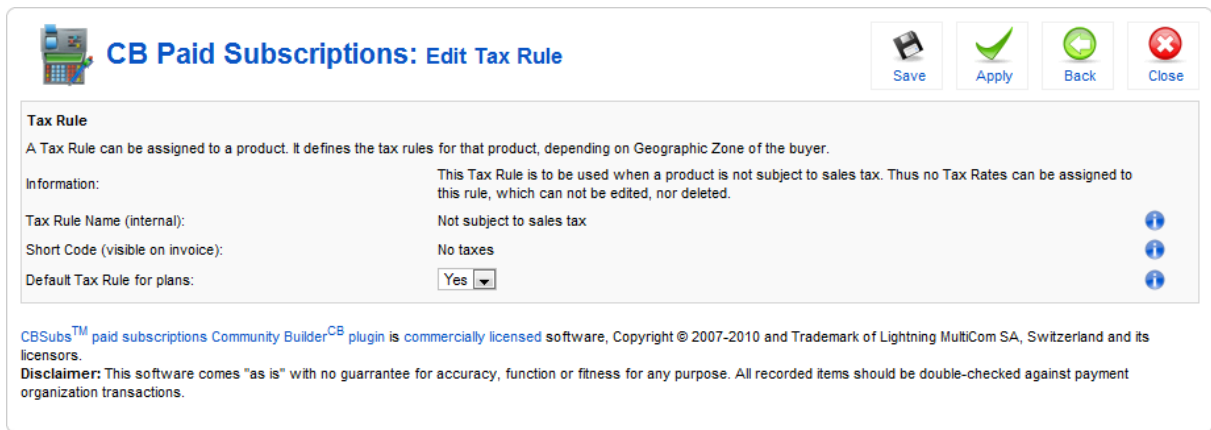
#	Tax Rule Name	Short Code	Default	Order	Tax Rates	Change Logs	Id
1	Not subject to sales tax	No taxes	Yes	1	---	---	1

Display # 20 << Start < Prev 1 Next > End >> Results 1 - 1 of total 1

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Figure 172: Tax Rules summary page

Selecting the **Not subject to sales tax** link on this summary page will take us to the definition of this rule as illustrated in **Figure 173**. Once again we will notice that this rule cannot be deleted. The only thing that can be altered is the default rule flag (the Yes/No value).



CB Paid Subscriptions: Edit Tax Rule

Tax Rule
A Tax Rule can be assigned to a product. It defines the tax rules for that product, depending on Geographic Zone of the buyer.

Information: This Tax Rule is to be used when a product is not subject to sales tax. Thus no Tax Rates can be assigned to this rule, which can not be edited, nor deleted.

Tax Rule Name (internal): Not subject to sales tax

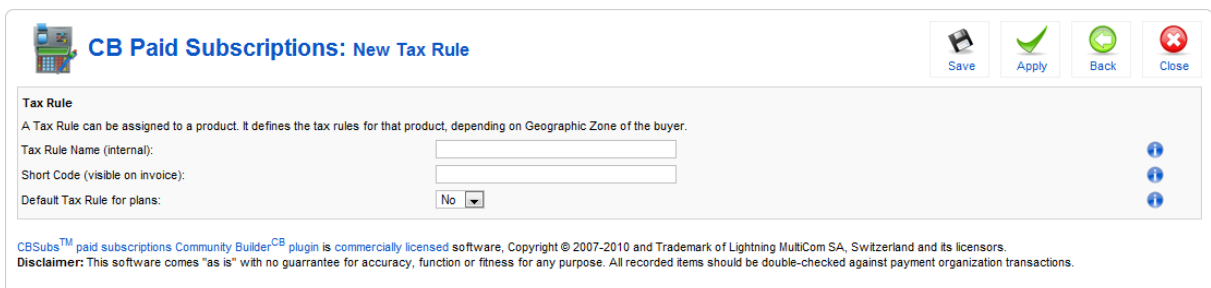
Short Code (visible on invoice): No taxes

Default Tax Rule for plans: Yes

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Figure 173: Not subject to sales tax predefined rule

We can create a new tax rule by clicking on the New icon or the [Create New](#) link on the Tax Rules summary page. This will take us to the New Tax Rule page that is illustrated in **Figure 174**.



CB Paid Subscriptions: New Tax Rule

Tax Rule
A Tax Rule can be assigned to a product. It defines the tax rules for that product, depending on Geographic Zone of the buyer.

Tax Rule Name (internal):

Short Code (visible on invoice):

Default Tax Rule for plans: No

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Figure 174: New Tax Rule page

On this New Tax Rule page we are called upon to populate three parameters; two text fields and a drop-down Yes/No field as follows:

- **Tax rule name (internal):** [initial value: empty]
This text parameter should be populated with the name you want to use for this rule internally within **CBSubs™**. This name will not appear in frontend user interaction.
- **Short Code (visible on invoice):** [initial value: empty]
This text parameter should be populated with a short code describing the tax rule. This short code will be shown in frontend on the **CBSubs™** generated invoice.
- **Default Tax Rule for plans:** [initial value: No]
This 'Yes/No' drop-down selectable field allows us to specify if this tax rule is

to be considered as a default rule that is applied to **CBSubs™** plans that do not have a specific tax rule specified. Please note that the **CBSubs™** user interface permits multiple tax rules to be simultaneously specified as default rules. **CBSubs™** will use the first default tax rule specified as ordered in the Tax Rule summary page as the default rule.

7.16.4 Tax Rates icon



The **Tax Rates** icon area of the **CBSubs™** taxation system is initially empty (no Tax Rates published). By selecting the icon we will be taken to the Tax Rates Summary page which is basically empty as illustrated in **Figure 175**. On this summary page we see a number of columns used to characterize each tax rate.

These concepts will be explained in detail during the creation of a new tax rate process that follows.

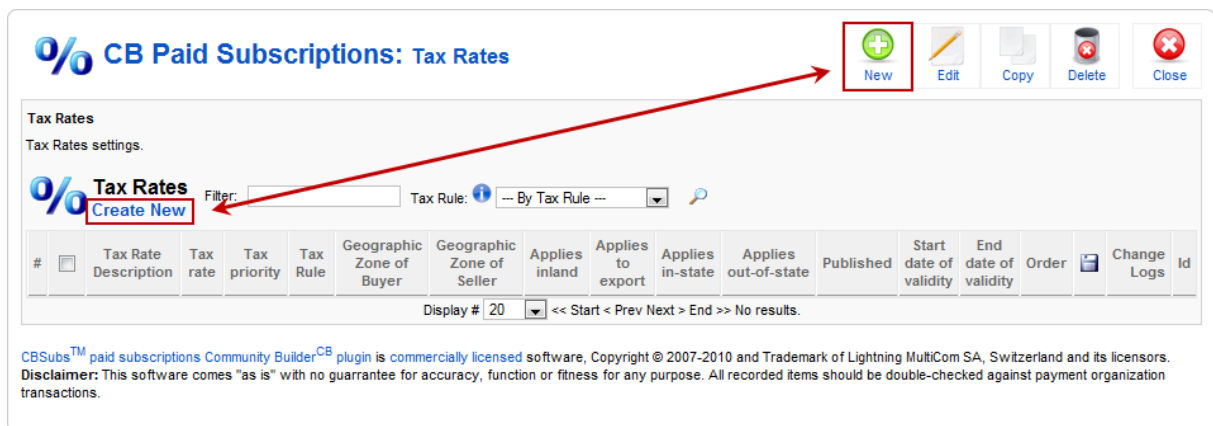







Figure 175: Tax Rate Summary page

We can create a new tax rate by clicking on the New icon or the **Create New** link on the Tax Rates summary page. This will take us to the **New Tax Rate** page that is illustrated in **Figure 176**. In order to create a new tax rate we need to populate a number of parameters on this page.


CB Paid Subscriptions: New Tax Rate

 Save
  Apply
  Back
  Close

Tax Rate

A Tax Rate applies to a Tax Rule, which applies to products. A Tax Rate depends on the buyer's Geographic Zone (which is a set of country and state/province combinations (Geographic Zone Entry)). A Geographic Zone can be assigned to a tax rate (which can be assigned to a tax rule, which can be assigned to products).

Tax settings

Here you can set precisely **WHAT** this tax is:

The tax is:

Tax Rate in PERCENT (%):

Tax priority:

Short Description (visible on invoice):

Tax Rule

Here you can set precisely **TO WHAT** this tax applies: a Product/Plan can be set to use one Tax Rule in the "Tax" tab of the product settings.

Tax rule to assign this tax to:

Geographic conditions for applying this tax

Here you can set precisely **WHERE** this tax applies:

Geographic Zone of Buyer:

Geographic Zone of Seller:

Domestic sales

Does this tax apply for sales inside of the seller Country:

Does this tax apply for sales inside of the seller State / Province:

Does this tax apply for sales outside of the seller State / Province:

Export sales

Does this tax apply for sales outside of the seller Country:

Calendar conditions for applying this tax

Here you can set precisely **WHEN** this tax applies: this allows to automatically change tax rates when tax rates are updated.

Published:

Start date of validity of this tax: / /

End date of validity of this tax: / /

Start and End dates means tax applies to:

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Figure 176: New Tax Rate page

This is a good time to review the basic **CBSubs™** taxation concepts outlined in the Overview section of **Chapter 7.16.1**. Lets recall the fact that a tax rate is bound to only one tax rule and that a tax rate has a formula, a geographic condition and a calendar condition.

Keeping these concepts in mind we will now describe the various settings associated with our tax rate definition.

The first framed section of parameters is the **Tax Settings** frame which has the following parameters:

- **The tax is:** [initial value: 'A percentage of the item price']

This drop-down field parameter is used to define the basic formula that will be used when calculating the applicable sales tax. The following options are available:

- 'A percentage of the item price'

This setting is used to specify that the sales tax should be calculated as a percentage of the item price. This is the most likely setting you will ever need in most country use cases throughout the world. If this value was not specified in this drop-down, then when you do specify it you will notice that the next parameter field that appears is the '**Tax Rate in PERCENT (%)**:' field (automatically appears using ajax technology).

Example: With this setting and if next parameter '**Tax Rate in PERCENT (%)**:' is 20%, then for an item priced 100 euro, the calculated sales tax will be $20\% \times 100 = 20$ euro.

- 'A fixed amount'

This setting is used to specify that a fixed amount should always be used as the sales tax value for every item. If this value is specified here, then the next parameter field that will appear is the '**Currency**' drop-down field followed by the '**Fixed Tax Amount in currency above**:' field.

Example: With this setting and the '**Currency**' field set to Euro and the '**Fixed Tax Amount in currency above**:' value set to 10, an item priced at 100 USD will have a sales tax of 10 Euro.

- 'A fixed amount added/subtracted to/from the item price, plus a percentage'

This setting is used to specify that a fixed amount should be added/subtracted to/from item price and then a percentage should be applied to result in order to calculate the applicable sales tax. With this setting in place, the next 3 parameters that will follow will be: '**Tax Rate in PERCENT (%)**:', '**Currency**' and '**Fixed Tax Amount in currency above**:'.

Example: With this setting and '**Tax Rate in PERCENT (%)**:' set to 5%, '**Currency**' set to Euro and '**Fixed Tax Amount in currency above:**' set to 10, a 100 USD priced item would have a calculated sales tax of: $(100 \text{ USD} + 10 \text{ Euro}) * 5\%$. The currency of the value to add is dynamically converted with latest CEB daily rate to the value of the payment basket (items inside a payment basket must all be same currency).

- 'A percentage of the item price added/subtracted by a fixed amount'
This setting is used to specify that a percentage if first applied followed by the addition/subtraction of a fixed amount in order to calculate the applicable sales tax. With this setting in place, the next 3 parameters that will follow will be: '**Tax Rate in PERCENT (%)**:', '**Currency**' and '**Fixed Tax Amount in currency above:**'.

Example: With this setting and '**Tax Rate in PERCENT (%)**:' set to 5%, '**Currency**' set to Euro and '**Fixed Tax Amount in currency above:**' set to 10, a 100 USD priced item would have a calculated sales tax of: $(100 \text{ USD} * 5\%) + 10 \text{ Euro}$. The currency of the value to add is dynamically converted with latest CEB daily rate to the value of the payment basket (items inside a payment basket must all be same currency).

- 'A fixed amount depending on the corresponding items price'
This setting is used to specify a step function to be used when calculating the applicable sales tax. With this setting in place, the next 2 parameters that will follow will be: '**Currency:**' and '**Step Tax formula:**'. The 'Step Tax formula:' field parameter (see further down in this section) will allow us to vary the percentage of tax applied based on the value range of the item price. For example for items under 100 euro a sales tax of 10% applied, but for items over 100 euro a sales tax of 15% might apply.

- **Tax Rate in PERCENT (%)**: [initial value: empty]

This text field parameter should be populated with the percentage value that

should be used when performing percentage based sales tax calculations.

Please note that the presence of this parameter field depends on the setting of the previous '**The tax is**' parameter field.

- **Currency**: [initial value: Same as global configuration]

This drop-down select field parameter is used to specify which currency should be used during sales tax calculation operations. Please note that payment basket will be in a single currency and currency conversions will take place if this currency does not match the basket currency.

- **Fixed Tax Amount in currency above**: [initial value: empty]

This text field parameter is populated with the fixed amount that should be used in tax related calculations. Please see examples in '**The tax is**:' parameter area for better understanding regarding how this value will be used.

- **Step tax formula**: [initial value: empty]

This text field parameter is used to specify a step function that will be used to determine the applicable tax rate as a function of the item value.

Example: The string 0-20:0%,20-50:1%,50-100:4.5% means that items that cost less than 20 units of global currency will have a 0% sales tax but items that are between 20 and 50 units will be taxed at 1%, etc.

- **Tax priority**: [initial value: 1]

This text field parameter is used to specify the priority of this tax rate item in case multiple tax rates are applicable to same tax rule.

- **Short description (visible on invoice)**: [initial value: empty]

This text field parameter is used to specify a short description that should be visible in the **CBSubs™** generated invoice when relevant tax calculation is recorded.

The next framed parameter area is the 'Tax Rule' framed area that contains a single field parameter:

- **Tax rule to assign to this tax to:** [initial value: -- Select tax rule --]
This drop-down field parameter contains values taken from the specified tax rules (see previous icon area). Please note that the pre-defined '**Not subject to sales tax**' rule will not be included as an option here.

The next framed parameter area is the Geographic conditions for applying this tax frame and it contains 2 drop-down select field parameters followed by 2 framed parameter areas. The 2 drop-down select field parameters are:

- **Geographic Zone of Buyer:** [initial value: To Buyers everywhere]
This drop-down select field parameter is populated with the geographic zone entries specified in the Geographic Zone icon area (see **Chapter 7.16.5**). This is used to state which buyer zone is applicable for this tax rate.
Example: This rate is only applicable to buyers within a European Union geographic zone and will not be applied if buyers zone is determined to be outside the European Geographic zone (this is accomplished using the address specified by the buyer).
- **Geographic Zone of Seller:** [initial value: To Sellers everywhere]
This drop-down select field parameter is populated with the geographic zone entries specified in the Geographic Zone icon area (see **Chapter 7.16.5**). This is used to specify which seller zone is applicable for this tax rate. Currently this setting should be specified in accordance to the Seller information completed in the Settings -> Tax tab as described in **Chapter 7.3.4**.

The next set of parameters to be specified are the parameters in the **Domestic Sales** framed area:

- **Does this tax apply for sales inside of the seller Country:** [initial value: 'Yes, apply this tax for all domestic sales']
This drop-down select field parameter can be set to one of the following options:
 - 'No, never charge this tax for domestic sales'
 - 'Yes, apply this tax for all domestic sales'

- Yes, apply this tax for domestic sales but for Consumers – B2C
 - Yes, apply this tax for domestic sales but for Businesses only – B2B
- **Does this tax apply for sales inside of the seller State / Province:** [initial value: 'Yes, apply this tax for in-state sales']
This drop-down select field parameter can be set to one of the following options:
 - 'No, never charge this tax for in-state sales'
 - 'Yes, apply this tax for in-state sales'
 - 'Yes, apply this tax for in-state sales but for Consumers – B2C'
 - 'Yes, apply this tax for in-state sales but for Businesses only – B2B'
- **Does this tax apply for sales outside of the seller State / Province:** [initial value: 'Yes, apply this tax for out-of-state sales too']
This drop-down select field parameter can be set to one of the following options:
 - 'No, never charge tax for out-of-state sales'
 - 'Yes, apply this tax for out-of-state sales too'
 - 'Yes, apply this tax for out-of-state sales but for Consumers – B2C'
 - 'Yes, apply this tax for out-of-state sales but for Businesses – B2B'

The **Export Sales** framed area has only one parameter to be specified:

- **Does this tax apply for sales outside of the seller Country:** [initial value: 'Yes apply this tax rate for all export sales too']
This drop-down select field parameter can be set to one of the following options:
 - 'No, never charge tax for export sales'
 - 'Yes apply this tax rate for all export sales too'
 - 'Yes apply this tax rate for all export sales but for Consumers – B2C'
 - 'Yes apply this tax rate for all export sales but for Businesses – B2B'

Finally the last framed parameter area in the tax rate page is the Calendar conditions for applying this tax frame and it is comprised of the following 4 field parameters:

- **Published:** [Initial value: Yes]
This Yes/No drop-down select field parameter is used to activate/deactivate the specific tax rate.
- **Start date of validity of this tax:** [initial value: no date selected]
This date select field parameter is used to specify the start validity date of this tax rate.
- **End date of validity of this tax:** [initial value: no date selected]
This date select field parameter is used to specify the end validity date of this tax rate.
- **Start and End dates means tax applies to:** [initial value: Date of sales only independent of plan settings]
This drop-down select field parameter is used to determine how the tax rate applies with respect to the product sale and the duration of offered services.
Available options include:
 - Date of sales only independent of plan settings.
Use this option to instruct **CBSubs™** to apply taxes based on the sales date. The sales tax is calculated based on the applicable tax rates that are present on the sales date.
 - Throughout the validity period of the subscription if plan tax setting allows it too.
Use this option to instruct **CBSubs™** to calculate sales tax based on the entire service duration. For example, if the subscription plan has a 12 month duration and in the middle of the period (after 6 months) a tax rate change is scheduled, then the sales tax calculated will take into account this change.

7.16.5 Geographic Zone icon



The **Geographic Zones** icon area of the **CBSubs™** taxation system is initially empty (no zones specified). In this area you will be able to assign Countries and/or State / Providences to Geographic zones and then use the specified zone during your tax rate specifications (see previous **Chapter 7.16.4** regarding the Tax Rate icon area). By clicking on the **Geographic Zone**

icon you will be directed to the Geographic Zone summary page as illustrated in **Figure 177**.

CB Paid Subscriptions: Geographic Zones

Geographic Zones settings.

Geographic Zones Filter:

[Create New](#)

#	Geographic Zone Name	Geographic Zone Description	Edit Entries	Order	Geographic Zone Entries	Change Logs	Id
1	European Union Zone	European Union Geographic Zone	EDIT ENTRIES	1	26	1	10000

Display # 20 << Start < Prev 1 Next > End >> Results 1 - 1 of total 1

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Figure 177: Geographic Zone summary page

This figure shows a European Union Zone entry we have created. In order to create your own Geographic Zone you need to click on the New icon or on the Create New link that appear on the Geographic Zones summary page. You can also edit an existing entry by clicking on its title link in the appropriate row of your summary page. Our European Union zone is basically configured by completing the 2 field parameters illustrated in **Figure 178**. These parameters are:

- **Geographic Zone Name:** [initial value: empty]

This text field parameter should be populated with the name you wish to give your geographic zone. E.g., European Union Zone. This name will be used to identify this zone in other **CBSubs™** tax areas throughout the **CBSubs™** user interface. This name may be visible on the invoice is so configured.

- **Geographic Zone Description:** [initial value: empty]

This text field should be populated with a more descriptive longer title for the zone. It will not be presented to the purchaser.

Once these two parameters are populated and the edit page is saved by clicking on the Save icon, our summary page will be displayed once again. This time there will be a new row added to our summary page and it would have a clickable **EDIT ENTRIES** link in its Edit Entries column (as shown in **Figure 177**).

Figure 178: Geographic Zone edit mode

By selecting this **EDIT ENTRIES** link we will be able to see existing geographic entities that have already been added to this zone and we will also be able to add additional entities to the zone. This is illustrated in **Figure 179** where we see that we can add a new entry by clicking on the New icon or the **Create New** link.

Geographic Zone Entries

Country and State / Province entries forming a Geographic Zone.

Geographic Zone Entries
 Filter: Geographic Zone: Country: State / Province:
 Create New

#	Edit	Geographic Zone	Country	State / Province	Zip Codes	Order	Change Logs	Id
1	Edit	European Union Zone	Great Britain	---	All	1	1	100025
2	Edit	European Union Zone	Sweden	---	All	2	1	100024
3	Edit	European Union Zone	Spain	---	All	3	1	100023
4	Edit	European Union Zone	Slovenia	---	All	4	1	100022
5	Edit	European Union Zone	Slovak Republic	---	All	5	1	100021
6	Edit	European Union Zone	Romania	---	All	6	1	100020
7	Edit	European Union Zone	Portugal	---	All	7	1	100019
8	Edit	European Union Zone	Poland	---	All	8	1	100018
9	Edit	European Union Zone	Netherlands	---	All	9	1	100017
10	Edit	European Union Zone	Malta	---	All	10	1	100016

Display # 10 << Start < Prev 1 2 3 Next > End >> Results 1 - 10 of total 26

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Figure 179: Geographic Zone entities summary page

The New icon or Create New link will take us to the Geographic Entries edit page that is shown in **Figure 180**.

CB Paid Subscriptions: New Geographic Zone Entry

Geographic Zone Entry

A Geographic Zone is a set of country and state/province combinations (Geographic Zone Entry). A Geographic Zone can be assigned to a tax rate (which can be assigned to a tax rule, which can be assigned to products). It allows to determine the Geographic Zone of the buyer.

Geographic Zone:

Country (mandatory):

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Figure 180: Geographic zone entry edit page (initial state)

Initially this page appears with only two drop-down select field parameters. These are:

- **Geographic Zone:** [initial value: -- Select Geographic Zone --]

This drop-down select field parameter will contain as options the short names

of all Geographic Zone entities previously created.

- **Country (mandatory):** [initial value: -- Select Country --]
This drop-down select field parameter has all pre-populated Country entities as well as any new Country entities added using the Countries icon area (see **Chapter 7.16.6**).

Once you successfully select a country for the Country (mandatory): field parameter two (2) additional parameter fields will appear:

- **State / Province:** [initial value: All]
This drop-down select field parameter is populated with all the State / Province entries related with the previously selected country. For example: if we selected United States for the country we will have a list of all US states to select from. You can leave the default value 'All' to indicate that all states in the USA are to be included in this Geographic zone. If you need to create a zone with the east coast states, you would need to create multiple entries one for each state.
- **Zip Codes:** [initial value: All]
This drop-down select field parameter is used to specify which zip codes are to be included in the geographic zone. Allowable options are:
 - All
 - Following zip code only
If this is selected then another field parameter appears prompting us to enter a single zip code or a regular expression of zip codes that should be included in the zone.
 - In following range (type twice same Zip Code if only one).
If this option is selected, then two (2) more parameter fields are displayed prompting us to enter minimum and maximum range of zip codes that should be included in the zone.

7.16.6 Countries icon



The **Countries** icon area of the **CBSubs™** taxation system is initially populated with 249 countries, so most of the tedious work has already been done for you. Each country entry contains vital information that will be used in the **CBSubs™** taxation system. By clicking on the Countries icon you will be directed to the Countries summary page as illustrated in **Figure 181**.

CB Paid Subscriptions: Countries

New
 Edit
 Copy
 Delete
 Close

Countries settings.

Countries
 Filter:
 Used in Geographic Zone: By use in Geographic Zone

#		Country name	Country 2-characters-code	Country 3-characters-code	Country numeric ISO code	Tax numbers prefix	World Region	World Sub-Region	States / Provinces	World Sub-Region	Geographic Zones Entries	Change Logs
1		Afghanistan	AF	AFG	4		Asia	Southern Asia	34	Province	---	---
2		Åland Islands	AX	ALA	248		Europe	Northern Europe	---		---	---
3		Albania	AL	ALB	8		Europe	Southern Europe	36	District	---	---
4		Algeria	DZ	DZA	12		Africa	Northern Africa	48	Province	---	---
5		American Samoa	AS	ASM	16		Oceania	Polynesia	5	District	---	---
6		Andorra	AD	AND	20		Europe	Southern Europe	7	Parish	---	---
7		Angola	AO	AGO	24		Africa	Middle Africa	18	Province	---	---
8		Anguilla	AI	AIA	660		Americas	Caribbean	---		---	---
9		Antarctica	AQ	ATA	10				---		---	---
10		Antigua and Barbuda	AG	ATG	28		Americas	Caribbean	8	Parish	---	---

Display # 10 << Start < Prev 1 2 3 4 5 6 7 8 9 10 ... 25 Next > End >> Results 1 - 10 of total 249

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Figure 181: Countries summary page

On this page you can browse through the alphabetically listed countries or you can use the Filter box to easily pinpoint the country you are looking for. You can search for example for Greece by typing 'Greece' in the Filter box and then clicking on the magnifying glass icon.

This is illustrated in **Figure 182** where we show the specific settings for the country of Greece.

Figure 182: Greece country settings in Country icon area

7.16.7 States / Provinces icon



The **States / Provinces** icon area of the **CBSubs™** taxation system is initially populated with 4501 entities that are associated with the 249 countries that are pre-populated in the Countries icon area previously discussed. Each state / province entry can be used in a geographic zone (as discussed in **Chapter 7.16.5**). By clicking on the **States / Provinces** icon you will be directed to the **States / Provinces** summary page as illustrated in **Figure 183**.

You can use the Filter box or the Country drop-down filter to find all State / Provinces associated with a specific country. This is illustrated in **Figure 184** where we have used the drop-down filter to find all states in the United States country (filter value set to US which is the ISO code for United States).

CB Paid Subscriptions: States / Provinces

States / Provinces
 States / Provinces settings.


States / Provinces
 Filter:
 Country: By country Used in Geographic Zone: By use in Geographic Zone






#		State / Province name	State / Province name in latin	State / Province 3-characters-code	Country	Country 2-characters-code	Geographic Zones Entries	Change Logs
1		Andorra la Vella	Andorra la Vella	AD-07	Andorra	AD	---	---
2		Canillo	Canillo	AD-02	Andorra	AD	---	---
3		Encamp	Encamp	AD-03	Andorra	AD	---	---
4		Escaldes-Engordany	Escaldes-Engordany	AD-08	Andorra	AD	---	---
5		La Massana	La Massana	AD-04	Andorra	AD	---	---
6		Ordino	Ordino	AD-05	Andorra	AD	---	---
7		Sant Julià de Lòria	Sant Julià de Lòria	AD-06	Andorra	AD	---	---
8		Abu Dhabi	Abu Z_aby	AE-AZ	United Arab Emirates	AE	---	---
9		Ajman	Ajman	AE-AJ	United Arab Emirates	AE	---	---
10		Al Fujayrah	Al Fujayrah	AE-FU	United Arab Emirates	AE	---	---

Display # 10 << Start < Prev 1 2 3 4 5 6 7 8 9 10 ... 451 Next > End >> Results 1 - 10 of total 4501


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Figure 183: States / Provinces summary page


CB Paid Subscriptions: States / Provinces

States / Provinces
 States / Provinces settings.


States / Provinces
[Create New](#)

Filter:
 Country: US
 Used in Geographic Zone: --- By use in Geographic Zone ---

#	<input type="checkbox"/>	State / Province name	State / Province name in latin	State / Province 3-characters-code	Country	Country 2-characters-code	Geographic Zones Entries	Change Logs
1	<input type="checkbox"/>	Alabama	Alabama	US-AL	United States	US	---	---
2	<input type="checkbox"/>	Alaska	Alaska	US-AK	United States	US	---	---
3	<input type="checkbox"/>	American Samoa	American Samoa	US-AS	United States	US	---	---
4	<input type="checkbox"/>	Arizona	Arizona	US-AZ	United States	US	---	---
5	<input type="checkbox"/>	Arkansas	Arkansas	US-AR	United States	US	---	---
6	<input type="checkbox"/>	California	California	US-CA	United States	US	---	---
7	<input type="checkbox"/>	Colorado	Colorado	US-CO	United States	US	---	---
8	<input type="checkbox"/>	Connecticut	Connecticut	US-CT	United States	US	---	---
9	<input type="checkbox"/>	Delaware	Delaware	US-DE	United States	US	---	---
10	<input type="checkbox"/>	District of Columbia	District of Columbia	US-DC	United States	US	---	---

Display # 10
 << Start < Prev 1 2 3 4 5 6 Next > End >>
 Results 1 - 10 of total 57

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Figure 184: US States filtering

7.16.8 Sales Tax / VAT Report icon



The **Sales Tax / VAT Report** icon area of the **CBSubs™** taxation system is used to view important accounting data regarding your tax collections. Default view shows you monthly summations of collected tax amounts grouped by currency (for multi-currency collection case). You can use the filtering to produce other period viewing. Each recorded period allows you to quickly view all invoices or the period and invoices that have been taxed or exempted.

Payments completed date	Currency	Invoices	Tax-exempt invoices	Taxed invoices	Gross total invoiced and received	Gross sub-total exempt from sales tax	Gross sub-total containing sales tax	Net total sales, excl. sales-taxes	Net sub-total taxable sales	Sales-taxes collected	Tax rate	Currency exchange rate	Gross total invoiced and received (in main currency)	Net Sub-Total taxable (in main currency)
2012-04	CHF				CHF		CHF	CHF	CHF	CHF	8.00000%	0.831600831601	EUR	EUR
2012-04	EUR				EUR	EUR	EUR	EUR	EUR	EUR	8.00000%	1.000000000000	EUR	EUR
2012-04	USD			0	USD	USD	-	USD	USD 0	USD 0		0.765228037955	EUR	EUR 0
2012-03	CHF				CHF	CHF	CHF	CHF	CHF	CHF	8.00000%	0.831600831601	EUR	EUR

Figure 185: Tax / VAT Report summary sample page

As you can see in the sample page shown in Figure 185, the report groups invoices for each period (monthly by default) and also by currency (example in figure has 3 currencies). You can quickly drill-down and see individual invoices that have been generated during the period. A currency exchange rate used (to convert to primary currency of CBSubs) is also displayed.

Obviously, this report area is extremely useful for accounting purposes and your periodic tax reporting obligations.

7.17 Promotions Icon Area



The **Promotions** icon area of the **CBSubs™** system contains all relevant settings and entities that define how **CBSubs™** Smart Promotions are configured.

The icon when selected will reveal another set of 3 promotions related icons that are used to configure Smart Promotions, to monitor promotion usages and produce statistical graphs and reports regarding consumed promotions. These extra icon areas are illustrated in **Figure 186**.



Figure 186: Extra Promotion icon areas

7.17.1 Overview

The “Smart Promotions” functionality allows you configure powerful, personalized and extremely flexible promotions for your **CBSubs™** offerings. Much more than the “coupons” functionality we see on Internet website offerings, the CBSubs Smart Promotions functionality goes much further and gives the flexibility to implement almost any envisioned promotional concept for your offerings.

Please note that the Promotions functionality needs the **CBSubs™** Tax plugin installed and enabled (in order to use Geographic regions in Groups tab parameters).

7.17.2 Promotions Settings



The Promotion Settings icon area is used to manage (create, edit, delete, etc.) promotions. On the lower part of the icon itself you will see a summary count of the actual promotions that have been previously created and are available in the section. Clicking on the icon will reveal the CB Paid Subscriptions:

Promotions settings summary area as illustrated in **Figure 187**.

As you can see you can click on the New icon or the Create New link to create a new promotion and you can populate the filter text box to filter summary area by specific promotion name parts.

Promotions
Promotions settings.

Promotions Filter:
[Create New](#)

#	Promotion Name	Promotion Type	Coupon Code	Discount Type	Rate %	Amount	Published	Start date of validity	End date of validity	Priority	Order	Uses	Change Logs	Id
1	Leftover from last Gift Certificate	Applies to all purchases		Fixed Amount in CB field	0.0	0	✓			1	1	2	2	104
2	100 Gift Certificate	Coupon code	MYGIFTVERTIFICATE	Fixed Amount	0.0	100	✓			1	2	3	4	103
3	One month before expiration Plan-A	Coupon code	PROMO-PLANA	Percentage	15.00000000	0.00000000	✓			1	3	---	10	102
4	Membership Anniversary Discount	Applies to all purchases		Percentage	25.00000000	0.00000000	✗			1	4	---	3	101
5	Promotion #1	Coupon code	PROMO#1	Percentage	10.00000000	0.00000000	✓			1	5	3	5	100

Display # 20 << Start < Prev 1 Next > End >> Results 1 - 5 of total 5

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Figure 187: Promotions settings summary area

The very first item that is also mandatory to create a new promotion is to give the promotion a name as illustrated in **Figure 188**.

CB Paid Subscriptions: New Promotion

Promotion
A Promotion is applied to products and can depend on a number of conditions.

Name of promotion:

Basic **Advanced** **Conditions** **Timing** **Groups** **Display**

Save **Apply** **Back** **Close**

Figure 188: Creating a new promotion

There are 6 tab areas that contain parameter settings for our promotion. These areas are in order from left to right as:

- Basic

This tab has basic parameters that must be set for every promotion. This tab will always be populated for every promotion. Other tabs contain optional parameters, but this one is mandatory. The promotion type, basic validity, basic scope and discount must be specified in the tab.

- Advanced

This tab has parameters that specify advanced scope of promotion.

- Conditions

This tab is used to configure flexible conditions that must be met in order for the promotion to be valid. Conditions can be formulated based on specific plan statuses and a combination of criteria satisfaction statements using date comparisons and CB field value combinations. These conditions basically are expressed as a series of dynamically appearing parameter settings that will result in a 2 comparison formula in the form of:

(This or NOT this) condition_1 AND, OR, Exclusive OR, AND NOT (This or NOT this) condition_2
--

- Timing

This tab is used to configure specific parameters that determine how this promotion works with physical calendar plans.

- Groups

This tab has parameters that specify the user groups that the promotion addresses. These groups can be ACL groups of our CMS or Geographical as specified in the CBSubs Tax icon area.

- Display

This tab is used to define how the promotion should influence the plan price displayed by **CBSubs™**.

7.17.2.1 Basic Tab Promotion parameter settings

The “Basic” tab area of the Promotion settings icon area contains a number of parameter settings that are used to define basic elements concerning the promotion.

The “Promotion Calculation” frame has the following parameters:

- Promotion type

This drop-down field has the following options:

- Coupon code (default value)

Use this setting to specify that a coupon code is needed to trigger the promotion. If this setting is chosen then the “Coupon Code (enter ‘=’ for equal to CB field):” and a “Hinting description ...” parameters will automatically appear after the “Promotion type” parameter.

- Applies to all purchases

This setting instructs the system that this promotion does not need a coupon code to be entered by end user and it will automatically be applied if other advanced / conditions / groups tab parameters are satisfied.

- Coupon Code (enter ‘=’ for equal to CB field):

This setting allows you to specify the coupon code that must be entered to “authorize” this promotion. You can put any UTF-8 string here as a coupon code. Please note that when evaluating the coupon code, the system will use upper-case conversion (of coupon code and entered code) when comparing. You can also just enter the ‘=’ character and a new ‘CB Field containing coupon code:’ parameter will dynamically appear. This drop-down field parameter is used to select the CB field that should be used as the coupon code. This mechanism is used to create personalized coupon codes (placed in CB fields of users). See Promotions PUC-04 (**Chapter 8.4**) as an example illustrating this powerful concept.

- Hinting description for possible coupon code to display below the coupon field in basket:

This text field setting is used to place a hint message that should be displayed just below the coupon entry field during the checkout process. E.g., A promotion is currently applicable for this basket and you have been emailed a coupon code.

- The promotion is:

This drop-down parameter setting is used to specify the type of promotional action that is to be applied. Available options are:

- A percentage of the item price

Use this setting to give a percentage discount. Additional 'Discount Rate in PERCENT (%):' and 'Discount priority:' parameters will appear for population.

- A fixed amount

This setting is used to specify a fixed amount discount (subtracted from regular price). Once selected two additional parameter fields will dynamically appear: 'Currency:' parameter and 'Fixed Discount Amount in currency above:' parameter.

- A fixed amount subtracted/added from the item price plus a percentage
- A percentage of the item price, subtracted/added by a fixed amount
- A fixed amount or percentage depending on the corresponding items price
- A percentage of the items price from a CB field
- A fixed amount from a CB field

- Discount Rate in PERCENT (%):

This is the discount rate expressed as a decimal number but without the percentage symbol. Example: 15.5 here would mean 15.5% discount on regular price.

- Currency:

This drop-down selectable field parameter is used to specify the currency of the fixed discount amount (see next parameter). You can of course leave it as its default value 'Same as global configuration'. This parameter will only appear if the relevant 'This promotion is:' parameter has been configured to a setting that supports a fixed discount amount.

- Fixed discount amount in currency above:

The fixed discount amount to be subtracted from the regular price during checkout. This parameter will only appear if the relevant 'This promotion is:' parameter has been configured to a setting that supports a fixed discount amount.

- CB Field containing ISO currency symbol:
You can use this setting to specify that the currency symbol (and the amount – see next parameter) is to be taken from a CB field of the purchaser.
- CB Field containing amount:
Use this to instruct the system to grab the discount amount from a CB field of the user. The amount can be positive (discount) or negative (surcharge).
- Discount priority:
This is the priority level of the promotion. Discount rates of same priority are added and applied. Priority levels are applied starting at '1' (highest priority level).
- Exclusive within this priority:
This setting is used to instruct the system if this promotion is to be combined with other promotions of the same priority level or not.

The “Basic Promotion Conditions” frame has the following parameters:

- Published
This is a 'Yes/No' drop-down select field parameter to activate/deactivate the promotion.
- Start date of validity of this promotion:
This date setting specifies the start of the promotion.
- End date of validity of this promotion:
This date setting specifies the ending of the promotion.
- Maximum uses in total (0=unlimited):
The number of times this promotion can be used in total (by all users). Once this limit has been reached the promotion will no longer be applicable. Use '0' to indicate that there is no limit.
- Maximum uses per customer (0=unlimited):
The number of times this promotion can be used by a single user. Use '1' to indicate that each user can only take advantage of this promotion once.
- To which plans this promotion applies:
Select the plans (one or more) from the plan selection area that are relevant for this promotion. By default all plans are applicable.
- How this promotion applies to items in a basket:
Use this drop-down select field parameter to specify how this promotion

should be applied when multiple items are in a basket. The two available options are:

- Apply full promotional amount multiple times to each applicable item line
- Apply promotion amount to all applicable items in order until amount is depleted.

7.17.2.2 Advanced Tab Promotion Parameter Settings

The “Advanced” tab area of the Promotion settings icon area contains a number of parameter settings that are optional and can be used to define advanced elements concerning the promotion. If you are content with your promotion as it has been defined according to the “Basic” tab configuration, you can leave this tab as is (with its default values), otherwise you can continue to further refine the promotion with the parameters available on this tab.

This tab has 3 framed areas containing parameter settings. The first framed area is the “Promotion applies to” frame that in turn contains 2 sub-frames: the “Orders triggered by following user actions:” frame and the “And is discounted from basket orders’ amounts for:” frame.

The “Orders triggered by the following user actions:” frame contains the following parameters:

- Applies to registrations:
This ‘Yes/No’ drop-down selectable field is used to specify if the promotion applies to purchases made during the registration process or not.
- Applies to upgrades:
This ‘Yes/No’ drop-down selectable field is used to specify if the promotion applies for upgrades or not.
- Applies to renewals:
This ‘Yes/No’ drop-down delectable field is used to specify if the promotion should be considered for renewals (as opposed to upgrades/new purchases).

The “And is discounted from basket orders’ amounts for:” frame contains the following parameters:

- Single payment (and for autorecurring payments subscriptions: First payment amount):
This 'Yes/No' drop-down selectable field is used to specify if the promotion is to apply for single payment products (or first payment of auto-recurring product) or not.
- For Autorecurring payments subscriptions only: Second and following auto-recurring payments amounts:
This 'Yes/No' drop-down selectable field is used to specify is the promotion is to apply for auto-recurring payment products or not.

The “Simultaneous purchases required” frame contains the following single parameter:

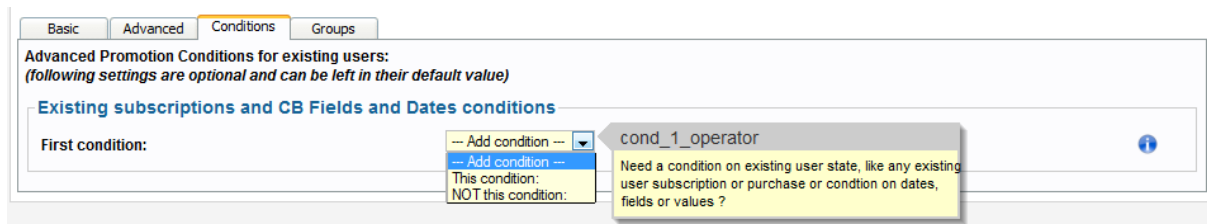
- Which plans must be purchased at same time:
Select the plans that must be purchased at the same time in order for this promotion to be valid.

The “Displaying in basket and on invoice” frame also has a single parameter as follows:

- Should promotions with zero values display in basket and invoices:
Use this parameter to specify how the system should handle zero value discount displays. Available options are:
 - No, hide promotions resulting in zero discount in basket and invoice
 - Yes, show applicable promotions even in case of zero resulting discount

7.17.2.3 Conditions Tab Promotion Parameter Settings

The Conditions tab of our Promotion configuration is used to specify conditions that must exist on subscriptions, dates and CB fields in order for promotion to apply. It is very flexible and can be used to create powerful conditional promotions.



A similar mechanism and logic as in the case of plan workflows conditions described in **Chapter 7.5.4** is also used here.

This tab initially has a single framed area titled: 'Existing subscriptions and CB Fields and Dates conditions' that contains a single drop-down field parameter field titled: 'First condition:'. Depending on this first field setting a number of additional framed areas and field parameters will dynamically appear as appropriate.

This dynamic parameter area as in the case of the plan workflows tab, can be used to specify two conditions in the following form as shown in **Figure 189**:

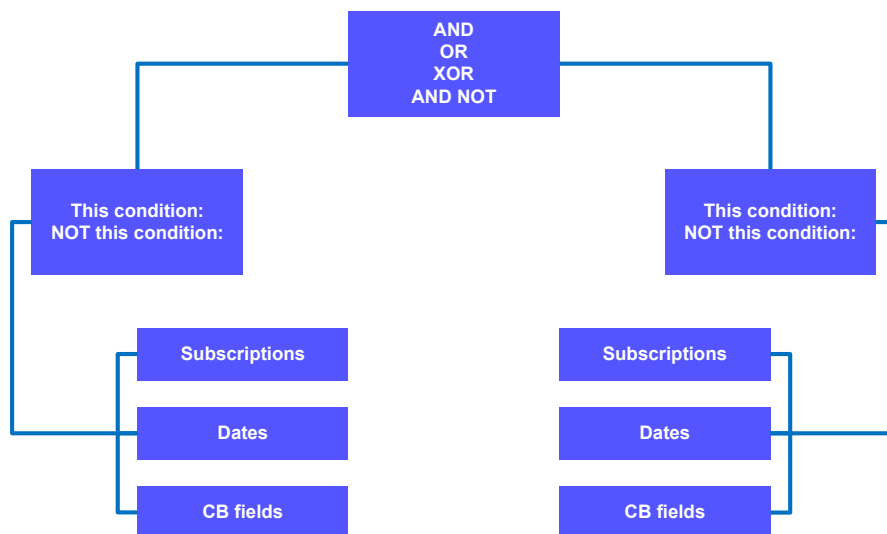


Figure 189: Promotion conditions formulation

Each of the 2 condition element groups can be evaluated in two ways: positively and negatively as specified in the drop-down field parameter shown in **Figure 188**. The two available options are: 'This condition' and 'NOT this condition'. Once one of

these options is selected new framed areas and parameters appear as illustrated in **Figure 190**.

Basic Advanced **Conditions** Groups

Advanced Promotion Conditions for existing users:
(following settings are optional and can be left in their default value)

Existing subscriptions and CB Fields and Dates conditions

First condition: This condition: [i]

Condition 1

Existing subscriptions

Any of the following plans subscriptions:

- None is needed ---
- PLAN-B
- PLAN-A
- PAR1
- CH1

Dates / CB Fields Comparisons

Date A, Field A or Value A: is not relevant [i]

Second condition And/Or: --- Add condition --- [i]

Figure 190: Promotion condition framed parameters

The 'Existing subscriptions' framed parameters are used to specify which (if any) plans need to have subscriptions in order for the promotion to be applicable during purchase checkout. Once one of the plans is selected in the 'Any of the following plans subscriptions:' parameter field area, two (2) new parameters will automatically appear: the 'Must be in state:' parameter and 'Or can be purchased same time:' as illustrated in **Figure 191**.

Existing subscriptions

Any of the following plans subscriptions:

- None is needed ---
- PLAN-B
- PLAN-A
- PAR1
- CH1

Must be in state:

- Not relevant ---
- Active
- Registered Unpaid
- Expired
- Unsubscribed
- Upgraded to other
- Invalid

Or can be purchased same time:

No: those plan(s) must already be existing [i]

cond_1_plans_required
Select the plans that must already be active for this condition to apply (CTR/CMD-click: multiple).

Figure 191: Extra Existing subscription frame parameters

We can use these parameters to require that one or more plan subscriptions must exist (in certain states) in order for the promotion to be considered. We can also use the 'or can be purchased at the same time:' parameter to specify if a subscription can be purchased at the same time (during check-out) or not.

To summarize, the 'Existing subscriptions' framed area is used to specify which plan subscription conditions are required for the promotion to be applicable. Example: promotion can be created that is only applicable for 'expired' subscribers of 'plan-A'.

The 'Dates / CB Fields Comparisons' framed area is used to specify conditions against CB and CSubs related dates and also against CB fields. The initial 'Following date, field or value:' parameter of this frame is illustrated in **Figure 192**.

The screenshot shows a web form titled 'Dates / CB Fields Comparisons'. It contains a label 'Date A, Field A or Value A:' followed by a dropdown menu. The dropdown menu is open, showing a list of options: 'is not relevant', 'is not relevant', 'Order Date of the order wanting to use this promotion', 'Subscription Date of existing user subscriptions above', 'Last renewed Date of existing user subscriptions above', 'Expiry Date of existing user subscriptions above', 'Payment Date of existing merchandises/donations above', 'Following CB field', and 'Constant Value or String (CB substitutions can be used)'. To the right of the dropdown is a text input field labeled 'cond_1_date_1'. A tooltip is visible over the text input field, containing the text: 'Select left side of conditional comparison statement. This can be a CSubs specific date, a CB field (any text, number or date field), or a string value (CB field substitutions can be used)'.

Figure 192: Dates / CB Fields Comparisons frame

This 'Date A, Field A or Value A:' parameter accepts one of the following options:

- Is not relevant
- Order Date of the order wanting to use the promotion
- Subscription Date of existing user subscriptions above
- Last renewed Date of existing user subscriptions above
- Expiry Date of existing user subscriptions above
- Payment Date of existing merchandise/donations above
- Following CB field
- Constant Value or String (CB substitutions can be used)

These options initiate comparison formulas that can be used to conditionally apply the promotion based on the comparison results.

Note: Currently date comparisons can only be made for dates after 1.1.1970.

As an example **Figure 193** illustrates a condition that could be used to apply a promotion only for popular users that have total profile views (hits field) of more than 1000.

The screenshot shows a configuration window titled "Dates / CB Fields Comparisons". It contains the following fields and values:

- Date A, Field A or Value A: Following CB field
- CB Field A: Hits
- Date B, Field B or Value B: Constant Value or String (CB substitutions can be used)
- Value B: 1000
- Condition 1 (> for Dates): A > B (Value A is larger than Value B)

Figure 193: CB field comparison is larger than example

Another example is illustrated in **Figure 194**, where we check if the email address of purchaser contains a specific string.

The screenshot shows a configuration window titled "Dates / CB Fields Comparisons". It contains the following fields and values:

- Date A, Field A or Value A: Following CB field
- CB Field A: Email
- Date B, Field B or Value B: Constant Value or String (CB substitutions can be used)
- Value B: @domain.com
- Condition 1 (> for Dates): Value A contains Value B

Figure 194: CB field comparison contains example

The proper way to check if email address of purchaser matches a specific pattern is to use the regular expression comparison formula as illustrated in **Figure 195**.

The screenshot shows a configuration window titled "Dates / CB Fields Comparisons". It contains the following fields and values:

- Date A, Field A or Value A: Following CB field
- CB Field A: Email
- Date B, Field B or Value B: Constant Value or String (CB substitutions can be used)
- Value B: /@domain\.com\$/
- Condition 1 (> for Dates): Value A matches the Regexp contained in Value B

Figure 195: Regular Expression match against CB field example

In **Figure 196** we have given an example condition that will check if the order date is after the expiry date of the specified subscriptions and that no more than 1 week has elapsed after expiration date.

Dates / CB Fields Comparisons

Date A, Field A or Value A:

Date B, Field B or Value B:

Condition 1 (> for Dates):

AND Condition 2 (< for Dates):

Figure 196: Order Date comparison against expiry date example

The example illustrated in **Figure 197** will also accomplish the same end result as it also checks if expired subscription is less than 1 week old.

Dates / CB Fields Comparisons

Date A, Field A or Value A:

Date B, Field B or Value B:

Condition 1 (> for Dates):

AND Condition 2 (< for Dates):

Figure 197: Expiry Date comparison against order date example

Hopefully, the previous examples (and the promotion use case examples in **Chapter 8**) will help you understand the concept and the user interface. Suggestions for improving user interface while maintaining the flexibility is welcomed and encouraged on our CBSubs forum areas.

Note: The current implementation has the following limitation that date comparisons can be made only for dates after 1/1/1970

7.17.2.4 Timing Tab Promotion Parameter Settings

The “Timing” tab in the promotions area is used to specify how the promotion should work with calendar based plans.

The initial setup of this tab is illustrated in Figure 198. By default the Timing tab is configured to apply this promotion ‘On full price’ meaning that it will not do anything special for calendar plans.

Basic Advanced Conditions **Timing** Groups Display

Following conditions apply only on promotions on user subscriptions

Rule for calendar-type user subscription plans only

Use the following setting different than "On full price" only if this promotion is specific for calendar user-subscription plans only. If someone subscribes during or after the validity of a calendar plan:

Apply this promotion: On full price

Figure 198: Initial Rule frame for Timing tab

If the 'Apply this promotion' parameter is set to the alternative drop-down setting of 'Prorata only on the missed period units of calendar user subscription plans only', then additional parameter settings appear as illustrated in Figure 199.

Rule for calendar-type user subscription plans only

Use the following setting different than "On full price" only if this promotion is specific for calendar user-subscription plans only. If someone subscribes during or after the validity of a calendar plan:

Apply this promotion: Prorata only on the missed period units of calendar user subscription plans only

WARNING: This promotion will apply only to calendar-type user-subscription plans, and not apply to any other types of plans or products.

INFO:

The calendar plan duration will be sub-divided into following period units, and the discount/markup value/% set in the first Basic tab of this promotion relates to the entire duration of the calendar plan. But this rule will only discount for the period units of the calendar plan duration that have been considered as missed.

Calendar plan is sub-divided in following period units: Month

Current period should be considered as: Part of the remaining calendar plan duration (Not missed)

Maximum Periods above that can be considered as missed (leave empty for no limit):

Apply this promotion for completely missed calendar periods (catchup when renewing a calendar plans with no gaps allowed): Yes too: This promotion also applies to user subscriptions which don't have any left-over periods too

Figure 199: Rule frame for calendar plan promotions

The new parameters that appear allow us to configure this promotion for calendar plan discounting. The concept is to provide entry level discounts for members joining a club in the middle of its physical year. Example: If a new member subscribes in June and the calendar plan ends on December 31st, this user will be discounted since he joined in the middle of the year.

Figure 200 contains three very detailed examples to assist in understanding the feature and how it should be configured.

How this computes and examples

The discount/markup value/% set in the first "Basic" tab of this promotion will be divided by the total number of period units contained in the plan and then multiplied by the number of period units that have been missed when subscribing for this plan.

Example 1

An astronomy club has calendar-year memberships, and discounts 1/12th (8.33%) per fully missed month to new members joining during the year.

Setup:

Set a **100%** discount in basic tab, sub-divide here into **Month** period units, and consider current period as **Not missed**. Set maximum periods that can be considered missed to **11** (or leave empty, it will have same effect in this case). In plan pricing setup, consider giving a bonus time allowing people subscribing in December to get the next year's calendar plan without having to wait for January.

Explanation:

This calendar-year plan starting January 1st is subdivided into 12 1-month period units each worth 1/12th of the 100% discount: 8.33%. A user subscribing during March will be considered to have missed 2 full Month period units (January and February), so he will be getting 2/12th of the 100% discount, which is 16.66%, making him paying effectively for 10 months.

Example 2

An basketball club has calendar-year seasons starting September 1 and ending June 30. The yearly fee is 250\$ composed of a season playing license of 150\$ and 100\$ for the club membership. New members joining during the year get 10% discount on the club membership part per month they are missing of the 10 months of the season, including the month they are joining in. Members joining in July and August join for the next season.

Setup:

Set a **120\$** discount in basic tab (100\$ discount for 10 months means 120\$ for the whole calendar year), sub-divide here into **Month** period units, and consider current period as **Missed**. Set maximum periods that can be considered missed to **10** (important, that will limit the discount to 10/12th of 120\$, which is the 100\$ we want for 10 months). In plan pricing setup, give a bonus time of 2 months allowing people subscribing in July and August to get the next season's membership.

Explanation:

This calendar-year plan starting September 1st is subdivided into 12 1-month period units each worth 1/12th of the 120\$ discount: 10\$. A user subscribing during November will be considered to have missed 3 full Month period units (September, October and November), so he will be getting 3/12th of the 120\$ discount, which is 30\$ or 30% of the playing season club membership part, making him paying effectively for 8 months playing and the playing license.

Example 3

An online services agency has calendar-year memberships, and asks new members joining during the year to pay only for the exact amount of time left.

Setup:

Set a **100%** discount in basic tab, sub-divide here into **Second** period units, and consider current period as **Not missed**. Leave empty the maximum periods that can be considered missed. In plan pricing setup, consider giving a bonus time allowing people subscribing end of December to get the next year's calendar plan without having to pay only a few cents to join in the last days of the year.

Explanation:

This calendar-year plan starting January 1st is subdivided into seconds period units, with the whole year missed giving 100% discount. A user subscribing during the year will be considered to have missed all the seconds since the begin of the year, so he will be getting the exact corresponding discount, which makes him paying exactly for the remaining time.

Figure 200: Rule frame examples for calendar plan discounting

7.17.2.5 Groups Tab Promotion Parameter Settings

The "Groups" tab in the promotions area is used to specify the "Group" related conditions that must be satisfied in order for the promotion to be applicable. The tab has two framed areas as illustrated in **Figure 201**.

Basic Advanced Conditions **Groups**

User group and Users condition:
(following settings are optional and can be left in their default value)

Buyer geographic and business conditions

Geographic Zone of Buyer: To Buyers everywhere

Applies to orders invoiced to: Businesses and Consumers

Buyer usergroup conditions

Applicable for Group (and above this group):

- Select Access Level (CTR/CMD-click: multiple) --
- Public
- Manager
- Administrator
- Registered
- Author
- Editor
- Publisher
- Super Users

Users (Users ids, comma-separated if needed):

Figure 201: Groups tab in Promotions setting icon area

The first framed area is titled “Buyer geographic and business conditions” and contains two (2) drop-down field parameters that are used to specify which Geographic zone the buyer must be situated in and what type of entity (business, consumer) the buyer is considered as, in order for the promotion to be considered.

The second frame titled “Buyer usergroup conditions” contains two parameters, the ‘Applicable for Group (and above this group):’ parameter and the ‘Users (Users ids, coma-separated if needed):’.

7.17.2.6 Display Tab Promotion Parameter Settings

The “Display” tab in the promotions area is used to specify how the promotion affects the plan price display. Basically, you can override the regular plan price and display the discounted price (in case of automatic promotions).

CB Paid Subscriptions: New Promotion

Save Apply Back Close

Promotion

A Promotion is applied to products and can depend on a number of conditions.

Name of promotion:

Basic Advanced Conditions Timing Groups **Display**

The promotion can be displayed with the applicable plans and with subscriptions to the applicable plans

Override plans display: No, keep plans display as is

Figure 202: Initial view of Display tab in Promotion

By default the Display tab of a promotion is configured not to override the displaying of the plan as shown in Figure 202.

To instruct the promotion to override the plan name and description being displayed you need to edit the 'Display name and description' parameter shown in Figure 203.

Basic Advanced Conditions Timing Groups **Display**

The promotion can be displayed with the applicable plans and with subscriptions to the applicable plans

Override plans display: Yes, display plans differently as follows: ⓘ

Plan name and description display

Display name and description: Unchanged original text ⓘ

Plan price and duration display

Display price: Unchanged original text ⓘ

Substitutions

You can include following automatically computed dynamic prices to replace the default "[NORMAL_PRICE]" as substitutions:

Pricing substitutions: [NORMAL_PRICE] is the normal full display of normal pricing and duration with all upgrades-prorating indications, [NORMAL_PRICE_WITH_DURATION] is the normal full display of normal pricing and duration, [NORMAL_PRICE_NO_DURATION] is same but without duration, just one price (in selected currencies), [DISCOUNTED_PRICE] is the full indication of price and period, taking in account potentially applicable promotions. [DISCOUNT_PERCENTS] (integer without the % sign included) is the discount in percent.

User fields substitutions: [USERNAME], [NAME], [EMAIL], [cb_anycbfieldname]

Plan/Product substitutions: [PLAN_NAME], [PLAN_ALIAS], [PLAN_DESCRIPTION], [PLAN_REGISTRATION_PRICE] and [PLAN_UPGRADE_PRICE] (both display period and price), [PLAN_PRICE] (display generic period and price for plan, or amount donated for donation with currency, or price with currency of product for a merchandise), [PLAN_RATE] and [PLAN_FIRST_RATE] are numeric values, and in case of donations, the donation amount converted into the donation plan's currency

CMS Content plugins: If the plan allows to "Prepare content using CMS Content plugins" (Setting in Presentation tab of plan), the above overrides will be triggering CMS Content plugins

Figure 203: Display tab configured to display plans differently

You can choose to override by appending text to the normally displayed plan name and description by configuring the appropriate parameters as shown in Figure 204.

Override plans display: Yes, display plans differently as follows: ⓘ

Plan name and description display

Display name and description: Append following text to plan name and description: ⓘ

Plan name override: ⓘ

Plan description override: ⓘ

Path: ⓘ

Article Image Page Break Read More Toggle editor

Figure 204: Display tab configured to append to plan name and description

You can also completely replace (instead of appending) plan name and description by configuring the parameters as illustrated in Figure 205. You can also use the

substitutions [NORMAL_NAME] and [NORMAL_DESCRIPTION] to grab the original values and use them in your replacement areas.

The promotion can be displayed with the applicable plans and with subscriptions to the applicable plans

Override plans display: Yes, display plans differently as follows: ▾

Plan name and description display

Display name and description: Custom as follows (replacing normal plan name and description: ▾)

Plan name override:

Plan name and description substitutions: [NORMAL_NAME] is the substitution for normal plan name (title) and [NORMAL_DESCRIPTION] the substitution for the normal plan description.

Plan description override:

Rich Text Editor:

Path: p

Article

There are no parameters for this item

Figure 205: Display tab configured to replace plan name and description

You can configure to override price display by selecting the strike-through setting as illustrated in Figure 206. This is a great way to automatically show new discounted prices compared with normal pricing.

Plan price and duration display

Display price: Automatic sale display: Strike-through regular price with "SALE!" display of new price ▾

Automatic sale display: Displays (struck-through greyed) regular price of plan, then a text defined below in red (CSS styleable) then the promotional price in bold (CSS styleable).
E.g. ~~499\$~~ **SALE! 50\$**

Text to highlight promotion on plan (e.g. SALE!):

Styling help

CSS classes used: cpayPromotionPrice cpayPromotionId (id of this promotion) cpayPromotionPlan (id of the plan) (these 3 around everything), cpayPromotionRegularPrice (for regular price), cpayPromotionSaleText (for the highlighting text), cpayPromotionSpecialPrice (for the promotion discounted price)

Substitutions

You can include following automatically computed dynamic prices to replace the default "[NORMAL_PRICE]" as substitutions:

Pricing substitutions: [NORMAL_PRICE] is the normal full display of normal pricing and duration with all upgrades-prorating indications. [NORMAL_PRICE_WITH_DURATION] is the normal full display of normal pricing and duration, [NORMAL_PRICE_NO_DURATION] is same but without duration, just one price (in selected currencies), [DISCOUNTED_PRICE] is the full indication of price and period, taking in account potentially applicable promotions. [DISCOUNT_PERCENTS] (integer without the % sign included) is the discount in percent.

User fields substitutions: [USERNAME], [NAME], [EMAIL], [cb_anycbfieldname]

Plan/Product substitutions: [PLAN_NAME], [PLAN_ALIAS], [PLAN_DESCRIPTION], [PLAN_REGISTRATION_PRICE] and [PLAN_UPGRADE_PRICE] (both display period and price), [PLAN_PRICE] (display generic period and price for plan, or amount donated for donation with currency, or price with currency of product for a merchandise), [PLAN_RATE] and [PLAN_FIRST_RATE] are numeric values, and in case of donations, the donation amount converted into the donation plan's currency

CMS Content plugins: If the plan allows to "Prepare content using CMS Content plugins" (Setting in Presentation tab of plan), the above overrides will be triggering CMS Content plugins

Figure 206: Display tab configured to strike-through plan price display

Instead of the strike-through pricing override setting you can completely replace the pricing displayed by configuring your parameters as shown in Figure 207.

There are many substitution strings that you can use to grab previous price and show new pricing elements.

Plan price and duration display

Display price: Custom as follows: [dropdown]

Plan price display text (default: [NORMAL_PRICE]):

[NORMAL_PRICE]

Path: p

Article [icon] Image [icon] Page Break [icon] Read More [icon] Toggle editor [icon]

Substitutions

You can include following automatically computed dynamic prices to replace the default "[NORMAL_PRICE]" as substitutions:

Pricing substitutions: [NORMAL_PRICE] is the normal full display of normal pricing and duration with all upgrades-prorating indications. [NORMAL_PRICE_WITH_DURATION] is the normal full display of normal pricing and duration, [NORMAL_PRICE_NO_DURATION] is same but without duration, just one price (in selected currencies), [DISCOUNTED_PRICE] is the full indication of price and period, taking in account potentially applicable promotions. [DISCOUNT_PERCENTS] (integer without the % sign included) is the discount in percent.

User fields substitutions: [USERNAME], [NAME], [EMAIL], [cb_anycbfieldname]

Plan/Product substitutions: [PLAN_NAME], [PLAN_ALIAS], [PLAN_DESCRIPTION], [PLAN_REGISTRATION_PRICE] and [PLAN_UPGRADE_PRICE] (both display period and price), [PLAN_PRICE] (display generic period and price for plan, or amount donated for donation with currency, or price with currency of product for a merchandise), [PLAN_RATE] and [PLAN_FIRST_RATE] are numeric values, and in case of donations, the donation amount converted into the donation plan's currency

CMS Content plugins: If the plan allows to "Prepare content using CMS Content plugins" (Setting in Presentation tab of plan), the above overrides will be triggering CMS Content plugins

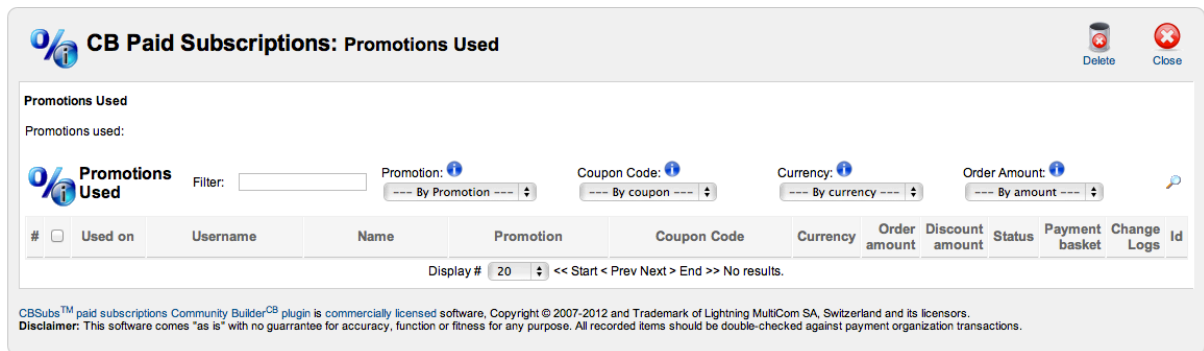
Figure 207: Display tab configured to replace plan price display

7.17.3 Promotions Used



The “Promotions Used” icon area is accessible from the “Promotions” main icon area and is used to monitor the usage / success of the promotion. A summary message is displayed in the lower part of the icon itself with the count of used promotions. Once you select the icon you will see the “Promotions Used” Summary area as illustrated in **Figure 208**.

On this summary area you can use one of the many filters to focus on the specific promotions of interest. Each row also has linkable items to take you back to the user profile of the promotions user and the promotion itself.



CB Paid Subscriptions: Promotions Used

Promotions Used

Promotions used:

Filter:

Promotion:

Coupon Code:

Currency:

Order Amount:

#	Used on	Username	Name	Promotion	Coupon Code	Currency	Order amount	Discount amount	Status	Payment basket	Change Logs	Id
Display # 20 << Start < Prev Next > End >> No results.												

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Figure 208: Promotions Used Summary page

This area is used to monitor the usage of promotions.

7.17.4 Promotion Statistics



The “Promotions Statistics” icon area is accessible from the “Promotions” main icon area and is used to reveal various statistics related to promotion usage. A summary message is displayed in the lower part of the icon itself with the number of promotion sales during the last 7 days and the previous week before this also.

Once you select the icon you will see the “Promotions Used” Statistics area as illustrated in **Figure 209**.

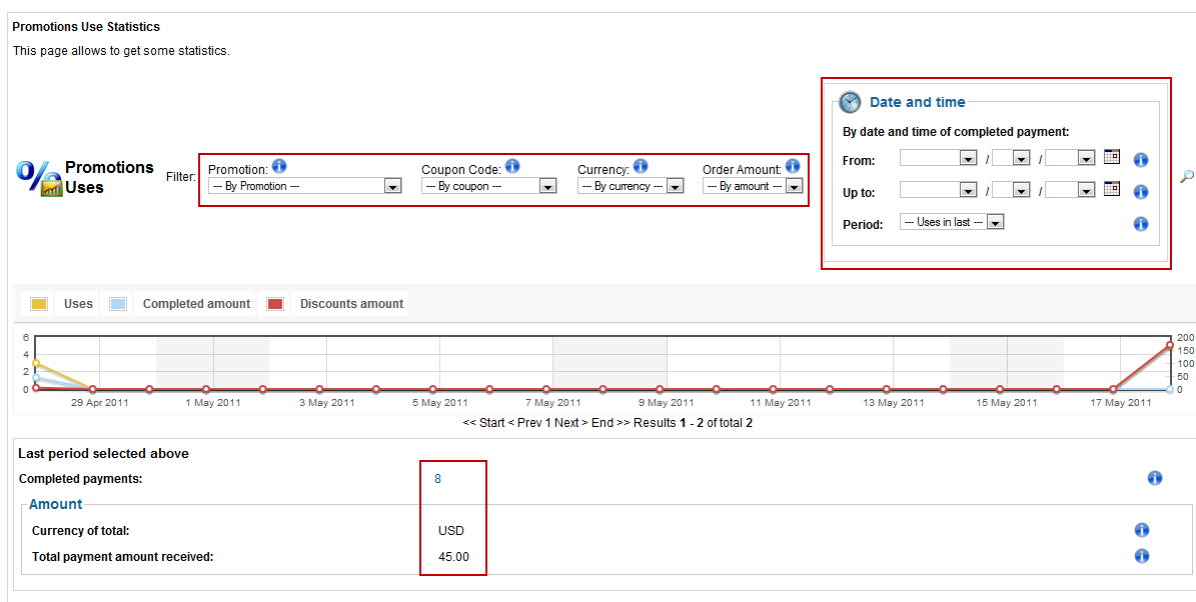


Figure 209: Promotion Use Statistics area

On this page you can select any one of the existing filters (drop-down fields) and get a nice graphical presentation of the results along with total related completed payments and total amount received.

7.18 Mailer Icon Area



The **Mailer** icon area of the **CBSubs™** system contains all relevant settings and entities that define how **CBSubs™** Mailer features are configured.

In the lower part of the Mailer icon, **CBSubs™** displays two summary counts for the number of active auto-messages (mailer tasks) and the total number of messages that have been sent so far.

The icon when selected will reveal 4 more promotions related icons that are used to further configure and manage mailer features. These extra icon areas are illustrated in **Figure 210**.

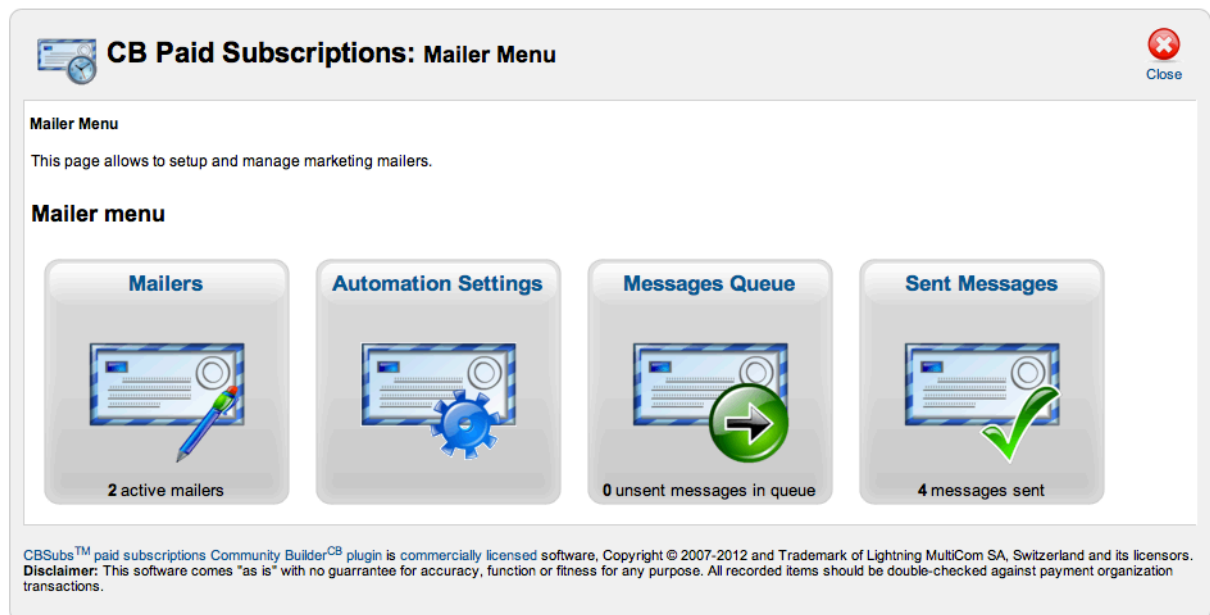


Figure 210: Extra Mailer icon areas

The mailer functionality concept is a simple one. You configure one or more mailer tasks using the Mailer icon area of **Figure 210**. Each task can be configured to send personalized emails or private messages to specific users based on criteria that can be formulated using a combination of subscription event happenings, registration events and CB field values.

Once active mailer mailer tasks are created, we need to trigger them by visiting the Automation Settings area and manually select the relevant URL to evaluate all active

mailer tasks and populate the Message Queue area. The URLs given in the Automation Settings area can also be placed in a CRON job service (consult your hosting helpdesk) to be executed periodically in an automated fashion.

A URL given in the Automation Settings area can also process Mailer messages placed in the Message Queue. This can also be automated in a CRON job.

Finally, all sent messages are recorded in the Sent Messages icon area.

7.18.1 Mailer Settings



The Mailer Settings icon area is used to create and configure mailer tasks. Think of a mailer task as a unique conditional query that is performed on your userbase and generates a set of personalized messages that should be delivered to relevant users that have met mailer specified criteria.

Selecting the “New” icon or the “Create New” link creates a mailer task in the Mailers page area as illustrated in **Figure 211** and **Figure 212**.

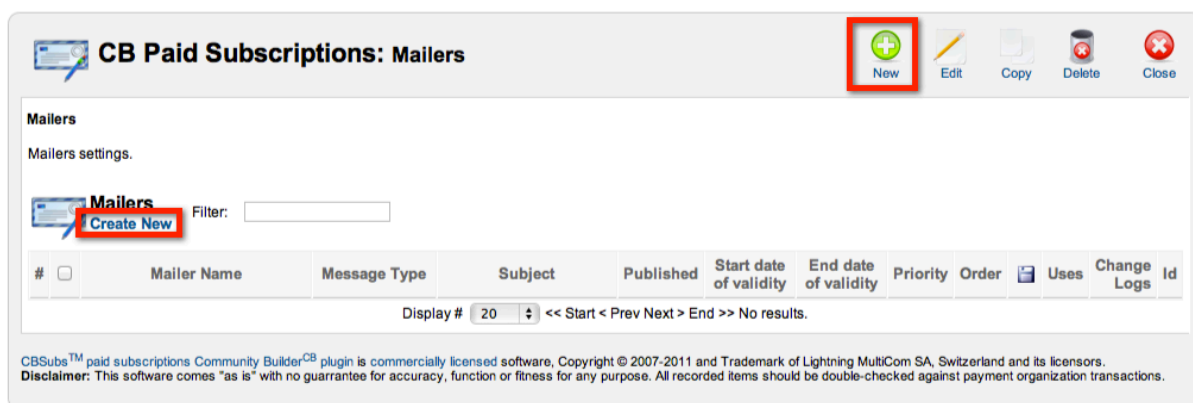


Figure 211: Mailer Settings tasks empty summary page

CB Paid Subscriptions: Mailers

New Edit Copy Delete Close

Mailers
Mailers settings.

Mailers Filter:
Create New

#	<input type="checkbox"/>	Mailer Name	Message Type	Subject	Published	Start date of validity	End date of validity	Priority	Order	<input type="checkbox"/>	Uses	Change Logs	Id
1	<input type="checkbox"/>	Welcome message sent 1 week after registration	Email	[[firstname]: Welcome to our community!]	✓			3	<input type="checkbox"/>	<input type="text" value="1"/>	—	4	101
2	<input type="checkbox"/>	Birthday Wishes	Email	Happy Birthday [[firstname]]	✓			3	<input type="checkbox"/>	<input type="text" value="2"/>	—	5	104
3	<input type="checkbox"/>	Personalized message 1 month after last online date	Email	[[firstname]: Last month news	✓			3	<input type="checkbox"/>	<input type="text" value="3"/>	—	3	103
4	<input type="checkbox"/>	Subscription benefits reminder sent 3 months after subscription	Email	Your membership benefits reminder	✓			3	<input type="checkbox"/>	<input type="text" value="4"/>	—	1	106
5	<input type="checkbox"/>	3 days before subscription expiration	Email	[[firstname]: Your subscription is about to en...	✓			3	<input type="checkbox"/>	<input type="text" value="5"/>	—	1	102
6	<input type="checkbox"/>	Subscription expiration follow-up message 10 days after expirati	Email	Your membership has expired 10 days ago	✓			3	<input type="checkbox"/>	<input type="text" value="6"/>	—	2	107
7	<input type="checkbox"/>	Merchandise purchase 10 days after message	Email	You purchased our product - here is a discoun...	✓			3	<input type="checkbox"/>	<input type="text" value="7"/>	—	1	105

Display # 20 << Start < Prev 1 Next > End >> Results 1 - 7 of total 7

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Figure 212: Mailer Tasks Summary page

As you can see from **Figure 213**, a mailer task is given a name (mandatory) and is defined using parameters grouped into 3 tabs:

- Basic
- Conditions and
- Groups

CB Paid Subscriptions: New Mailer

Save Apply Back Close

Mailer

A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.

Name of Mailer:

Basic

Conditions

Groups

Basic mailer settings:

Message

Message Type: Email

Message subject:

Message body:

Send email in: Text (recommended)

Apply email/PM template: Yes

Email attachments (absolute server paths):

From name:

From email addresses:

CC email to addresses:

BCC email to addresses:

Mailer priority: 3

Main Mailer Triggering Conditions

Here you can set precisely when and depending on what this mailer sends emails.

Automatically send message at following date: --- choose main timing condition ---

Relative to this date of the plans below: --- choose reference date ---

But do not send message if it's later than: And no other date condition

Maximum uses in total (0=unlimited):

Maximum uses per customer (0=unlimited):

Publishing

Publishing state and start and stop dates: this allows to automatically activate and deactivate mailers.

Published: Yes

Start date of validity of this mailer: / /

End date of validity of this mailer: / /

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Figure 213: Creating a new mailer task

The Basic tab is organized in three framed areas. The first frame is titled 'Message' and is used to define the actual message that will be sent to relevant users. The settings in the frame are:

- Message Type: [initial setting: Email]

This drop-down field parameter can be set to one of the following:

- Email
Specifies that the mailer task should produce email message for end users
- Private Message
Specifies that the mailer task should produce private messages (needs third-party PMS extension – uddelM recommended)

- Message subject: [initial setting: empty]

This mandatory text parameter field should be populated with the subject of your mailer message. You can use CB field substitutions to personalize this field (e.g., [firstname]: this is your mailer message subject)

- Message body: [initial setting: empty]

This mandatory text parameter field should be populated with the body of the message you want. CB Field substitutions can be used. This area can also contain HTML tags if email setting has been selected (see previous parameter) and HTML option is selected (see next parameter)

- Send email in: [initial value: Text (recommended)]

This drop-down field parameter only appears if Email was specified earlier and can be set to one of the following 2 values:

- Text (recommended)
Use this setting to specify that email is to be sent as text message
- HTML (not recommended)
Use this setting to specify that email is to be sent as an HTML message. This means that the Mailer body field can have HTML tags specified in it.

- Apply email/PM template: [initial value: Yes]

This drop-down field parameter setting can be set to:

- Yes
Use this option to specify that message body content is to be sent using the Mailer template settings specified in your Settings icon → Mailer tab area as described in **Chapter 7.3.7**.
- No
Do not use Mailer template for this task.

- Email attachments (absolute server paths): [initial value: empty]
Use this text field parameter to attach one or more (comma separated) files to your email message. You must specify absolute server path to file (see tooltip for example).
- From name: [initial value: empty]
Specify the from name your email messages should contain for this mailer task.
- From email address: [initial value: empty]
Specify the email address that should be used for this email mailer tasks.
- CC email to addresses: [initial value: empty]
Specify one or more email addresses (comma separated) that should be carbon copied on each email generated from this mailer task.
- BCC email to addresses: [initial value: empty]
Specify one or more email addresses (comma separated) that should be blind carbon copied on each email generated from this mailer task.
- Mailer priority: [initial value: 3]
Specify the priority level for this mailer task. Priority 3 is considered as medium priority. Higher priorities compared to priority 3 are 0,1,2.

The 'Main Mailer Triggering Conditions' frame follows with the following parameters:

- Automatically send message at following date: [initial value: --- choose main timing condition ---]
This drop-down field parameter has many timing values that are to be used with the next parameter.
- Relative to this date of the plans below: [initial value: --- choose reference date ---]
This setting is used to set the reference date to be used with the main timing condition parameter (see previous drop-down field) and can be set to one of the following values:
 - Subscription's subscription Date
Selecting this will automatically present additional fields to populate the specific subscription plan settings needed

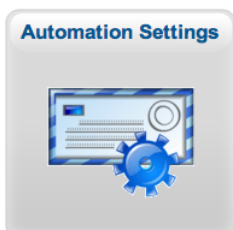
- Subscription's Last renewal Date
Selecting this will automatically present additional fields to populate the specific subscription plan settings needed
- Subscription's Expiry Date
Selecting this will automatically present additional fields to populate the specific subscription plan settings needed
- Merchandise's or Donation's Payment Date
Selecting this will automatically present additional fields to populate the specific subscription plan settings needed
- Member's Sign-up Registration Date
- Member's Last Online Date
- Member's Last Profile Update Date
- But do not send message if it's later than: [initial value: And no other condition]
This drop-down field parameter has many timing values that are to be used with the previous parameter
- Maximum uses in total (0=unlimited): [initial value: 0]
- Maximum uses per customer (0=unlimited) [initial value: 0]

The 'Publishing' frame contains the following:

- Published: [initial value: Yes]
Use this to enable or disable this mailer task. You can also toggle the setting from the Mailer summary page as illustrated on **Figure 212**.
- Start date of validity of this mailer: [initial value: empty date field]
- End date of validity of this mailer: [initial value: empty date field]

You can see examples of all above settings in **Chapter 9**.

7.18.2 Automation Settings



The Automation Settings icon area is used to either manually trigger filling of Messages Queue (see next chapter) or to trigger sending of all messages already placed in Message Queue.

The Automation Settings icon area gives you 3 URLs specific to your **CBSubs™** installation that will perform mailer related actions.

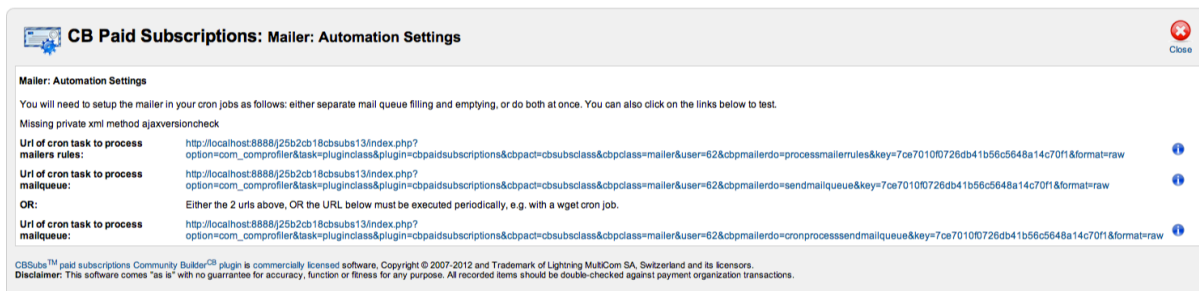
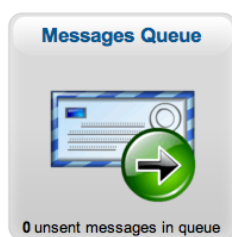


Figure 214: Mailer Automation Settings icon area

You should consult your hosting helpdesk to see how these URLs can be used to schedule automated CRON jobs in your environment.

7.18.3 Message Queue



The Message Queue icon area keeps track of mailer task generated individual messages that have been queued for delivery.

This area is populated if you click on the relevant URL in the Automation Settings icon area (described in previous Chapter).

You can also configure a server CRON job to do this for you.

At any given time, the Message Queue may contain mailer task items that have been placed there for the delivery process to take care of as illustrated in Figure 215.

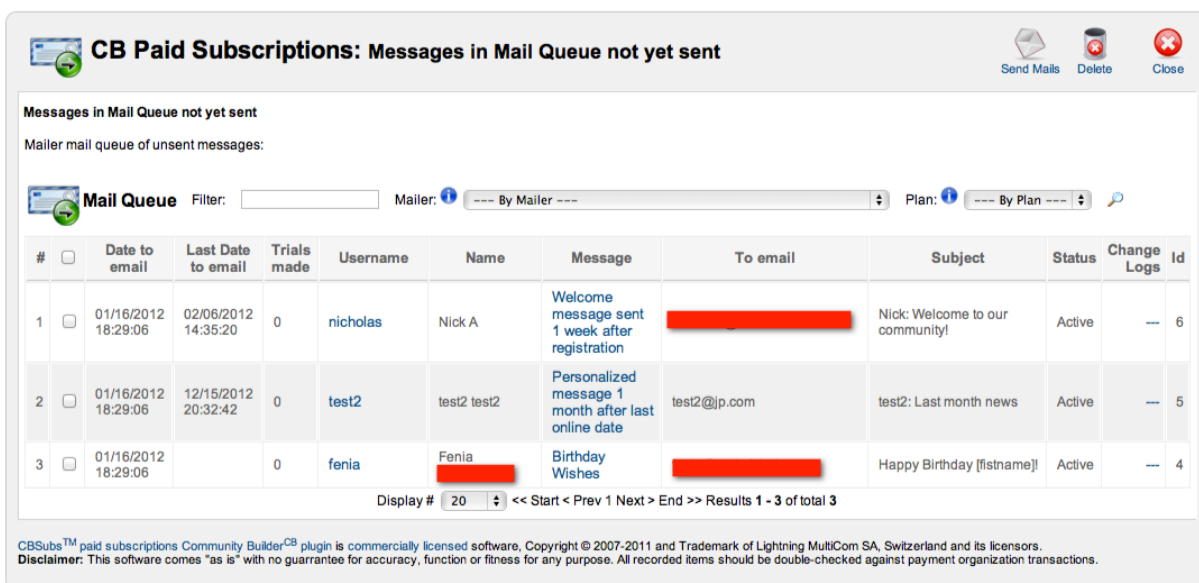
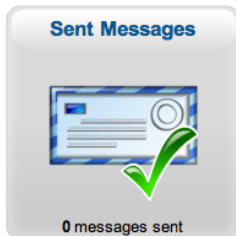


Figure 215: Mailer Message Queue with items ready for delivery

As you can see, you can manually select and remove items from the queue.

7.18.4 Sent Messages



The Sent Messages icon area contains mailer task items that have been processed and sent. It is used as a history repository of sent items.

This area is used to inspect final results of your mailer activities and you can delete items from the repository once you are satisfied with review. The Sent Messages icon area is illustrated in **Figure 216**.

CB Paid Subscriptions: Messages sent

Messages sent

Mailer messages sent:

Messages sent Filter: Mailer: By Mailer Plan: By Plan

#	Used on	Username	Name	Message	To email	Subject	Status	Change Logs	Id
1	01/15/2012 22:10:50	paulina				Hello [firstname] - test mailer #1	Active	1	3
2	01/15/2012 22:10:50	nantimis				Hello [firstname] - test mailer #1	Active	1	2
3	01/15/2012 22:10:50	fenia				Hello [firstname] - test mailer #1	Active	1	1

Display # 20 << Start < Prev 1 Next > End >> Results 1 - 3 of total 3

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Figure 216: Mailer Message Sent icon area

8 Working with Smart Promotions

The smart promotions implementation included in **CBSubs™** is extremely powerful and very flexible. You can create very personalized promotions for your **CBSubs™** products (subscriptions and merchandise items) and your membership.

In order to kick-start your imagination and perhaps better illustrate the tremendous flexibility and capabilities of this feature, we have compiled a list of “promotion use cases”. You are free of course to adapt or use one of these examples in your environment or create your own promotion ideas and share them on our CBSubs use case forums here:

<http://www.joomlapolis.com/forum/89-use-cases>

We have prepared the following Promotion Use Cases for your consideration:

- PUC-01 Coupon code for 20% Discount
- PUC-02 Automatic 15% discount to renew before plan expiration
- PUC-03 100 Euro Gift Certificate with wallet field
- PUC-04 Personalized discounts for individual members based on CB field values
- PUC-05 Membership anniversary discount promotion
- PUC-06 EU members discount promotion
- PUC-07 Buy 2 at same time for discount promotion

8.1 PUC-01 Coupon Code for 20% Discount

The following promotion example illustrated in **Figure 217** will give a 20% discount on selected CBSubs subscription plans or merchandise plans.

The screenshot shows the 'Basic' tab of a coupon configuration interface. At the top, there are four tabs: 'Basic', 'Advanced', 'Conditions', and 'Groups'. Below the tabs, the section 'Basic promotion settings:' is followed by a sub-section 'Promotion Calculation'. A text box states: 'Here you can set precisely how this promotion is applied:'. The 'Promotion Type:' is set to 'Coupon code' with a dropdown arrow. The 'Coupon Code (enter '=' for equal to CB field):' is 'EΛΛΑΔΑ-2011'. The 'Hinting description for possible coupon code to display below the coupon field in basket:' is empty. A 'Note:' section explains that a coupon entry field will appear on checkout only if the promotion's conditions allow, and that users need to be allowed to use a coupon. The 'The promotion is:' is set to 'A percentage of the item price'. The 'Discount Rate in PERCENT (%)' is '20'. The 'Discount priority:' is '1'. The 'Exclusive within this priority:' is 'Yes, no other promotions with same priority and lower ordering can apply same time'. Below this is the 'Basic Promotion Conditions' section. It states: 'Here you can set precisely when and to what this promotion applies: this allows to automatically activate and deactivate promotions.' The 'Published:' status is 'No'. The 'Start date of validity of this promotion:' is empty. The 'End date of validity of this promotion:' is empty. The 'Maximum uses in total (0=unlimited):' is '0'. The 'Maximum uses per customer (0=unlimited):' is '0'. The 'To which plans this promotion applies:' is a list box showing a selection of plans: '--- Applies to ALL Present AND Future Plans ---', 'Free', 'Advanced', 'Professional', 'Donation', 'MyCommunity', 'Coolness', 'FunLite', 'MyCommunity and Coolness templates', 'MyCommunity+Coolness+FunLite', 'CBSubs', and 'Installation'. The 'CBSubs' plan is currently selected.

Figure 217: PUC-01 Basic tab of 20% off discount coupon

The coupon code in this figure is a Greek string illustrating that utf-8 strings will also work just fine as coupon codes. The Advanced, Conditions and Groups tabs of this example contain default settings and are not shown.

8.2 PUC-02 Automatic 15% Discount to Renew before Expiration

This example illustrates how to configure a promotion to apply a 15% automatic (no coupon needed) discount to renew a plan before it expires.

In the “Promotion Calculation” frame of the Basic tab of our promotion configuration we specify the ‘Promotion Type:’ as ‘Applies to all purchases’. This means that it is automatic and no coupon code entry is needed. We also set the 15% discount rate in the same framed area as illustrated in **Figure 218**.

The screenshot shows the 'Promotion Calculation' configuration frame. It contains the following fields and values:

- Promotion Type:** A dropdown menu set to 'Applies to all purchases'.
- The promotion is:** A dropdown menu set to 'A percentage of the item price'.
- Discount Rate in PERCENT (%):** A text input field containing '15.00000000'.
- Discount priority:** A text input field containing '1' followed by an asterisk (*).
- Exclusive within this priority:** A dropdown menu set to 'No, other promotions with same priority can apply same time'.

On the right side of the frame, there are four blue circular icons with an 'i' inside, representing information or help links.

Figure 218: Promotion Calculation frame for renew before expiration promotion

In the “Basic Promotion Conditions” framed area we have set the ‘Published:’ parameter to ‘Yes’ and have selected that this promotion applies to ‘PLAN-A’ as illustrated in **Figure 219**.

The screenshot shows the 'Basic Promotion Conditions' configuration frame. It contains the following fields and values:

- Published:** A dropdown menu set to 'Yes'.
- Start date of validity of this promotion:** A date picker field.
- End date of validity of this promotion:** A date picker field.
- Maximum uses in total (0=unlimited):** A text input field containing '0'.
- Maximum uses per customer (0=unlimited):** A text input field containing '0'.
- To which plans this promotion applies:** A list box containing the following options: '--- Applies to ALL Present AND Future Plans ---', 'MER2', 'MER1', 'PLAN-B', 'PLAN-A' (which is highlighted in blue), 'PAR1', and 'CH1'.

On the right side of the frame, there are four blue circular icons with an 'i' inside, representing information or help links.

Figure 219: Basic Promotion Conditions frame for renew before expiration promotion

Since we want this promotion to only apply for renewal actions we have configured the “Promotion applies to” framed area of our Advanced tab as illustrated in **Figure 220**.

Promotion applies to

Orders triggered by following user actions:

Applies to registrations: No

Applies to upgrades: No

Applies to renewals: Yes

And is discounted from basket orders' amounts for:

Single payment (and for autorecurring payments subscriptions: First payment amount): Yes

For Autorecurring payments subscriptions only: Second and following auto-recurring payments amounts: Yes

Figure 220: Advanced tab for renew before expiration promotion

Finally, we need to configure that the order date must be before the expiration date as illustrated in **Figure 221**.

Condition 1

Existing subscriptions

Any of the following plans subscriptions: PLAN-A

Must be in state: Active

Or can be purchased same time: No: those plan(s) must already be existing

Dates / CB Fields Comparisons

Date A, Field A or Value A: Expiry Date of existing user subscriptions above

Date B, Field B or Value B: Order Date of the order wanting to use this promotion

Condition 1 (> for Dates): For dates: Date A > Date B (Date A must be later than Date B)


AND Condition 2 (< for Dates): And no other date condition 2

Figure 221: Conditions tab for renew before expiration promotion

8.3 PUC-03 Gift Certificate of 100 Euro with leftover wallet

This smart promotions use case is actually two promotion configurations integrating with each other. Well, actually the first promotion feeds the second one. The two summary promotion rows are illustrated in **Figure 222**.

Promotions
Promotions settings.

 **Promotions** Create New Filter:

#	<input type="checkbox"/>	Promotion Name	Promotion Type	Coupon Code	Discount Type	Rate %	Amount	Published	Start date of validity	End date of validity	Priority	Order	<input type="checkbox"/>	Uses	Change Logs	Id
1	<input type="checkbox"/>	100 Gift Certificate	Coupon code	MYGIFTVERTIFICATE	Fixed Amount	0.0	100	✓			1	<input type="button" value="v"/>	<input type="button" value="v"/>	3	4	103
2	<input type="checkbox"/>	Leftover from last Gift Certificate	Applies to all purchases		Fixed Amount in CB field	0.0	0	✓			1	<input type="button" value="v"/>	<input type="button" value="v"/>	2	2	104

Figure 222: Gift Certificate with leftover wallet promotions

The first promotion named “100 Gift Certificate” basically gives each user a once time 100 euro amount discount (can only be used once per user). After this first (and only) usage for each user, the remaining amount (if purchased items are less than 100 euro) will be stored in a CB text field named ‘Wallet’.

The “Promotion Calculation” frame for the Basic tab for this promotion setup is illustrated in **Figure 223**.

Promotion Calculation

Here you can set precisely how this promotion is applied:

Promotion Type:

Coupon Code (enter '-' for equal to CB field):

Hinting description for possible coupon code to display below the coupon field in basket:

Note: Note: A coupon entry field will appear below the order and invoicing address on check-out **only** if the promotions' conditions allow to use a coupon for that order. So you need to test **with a user allowed to use a coupon** to even see a coupon entry field on checkout.

The promotion is:

Currency:

Fixed Discount Amount in currency above:

Gift Card function: If a field for value (and if needed for currency too) is selected below, and the promotion amount above is larger than basket value, the remaining available discount will be added to this field once payment is completed, allowing implementation of gift card certificate function in conjunction with another discount using that field as wallet.

CB Field containing ISO currency symbol:

CB Field containing amount:

Discount priority: *

Exclusive within this priority:

Figure 223: Gift Certificate Promotion Calculation frame

We have specified a coupon code of ‘MYGIFTVERTIFICATE’ and have also specified that left-over amount is to be stored in the CB field ‘Wallet’.

In **Figure 224** we see that in the “Basic Promotion Conditions” framed area of our promotion Basic tab, we have specified that each user can only use this promotion once.

The screenshot shows the 'Basic Promotion Conditions' configuration frame. It includes the following fields and options:

- Published:** A dropdown menu set to 'Yes'.
- Start date of validity of this promotion:** A date picker.
- End date of validity of this promotion:** A date picker.
- Maximum uses in total (0=unlimited):** A text input field containing '0'.
- Maximum uses per customer (0=unlimited):** A text input field containing '1', which is highlighted with a red box.
- To which plans this promotion applies:** A list box containing the following items: MER2, MER1, PLAN-B, PLAN-A, PAR1, and CH1.
- How this promotion applies to items in a basket:** A dropdown menu set to 'Apply full promotion amount multiple times to each applicable item line'.

Figure 224: Basic Promotion Conditions frame of Gift Certificate Promotion

The second promotion configuration for this use case has not specified a coupon code (although it could have) and will be automatically applied if/when applicable.

The screenshot shows the 'Promotion Calculation' configuration frame. It includes the following fields and options:

- Promotion Type:** A dropdown menu set to 'Applies to all purchases'.
- The promotion is:** A dropdown menu set to 'A fixed amount from a CB field'.
- CB Field containing ISO currency symbol:** A dropdown menu set to 'Use default currency'.
- CB Field containing amount:** A dropdown menu set to 'Wallet'.
- Deduct used amount from CB field once payment is completed:** A dropdown menu set to 'Yes, remove amount from CB field after payment is completed'.
- Discount priority:** A text input field containing '1'.
- Exclusive within this priority:** A dropdown menu set to 'No, other promotions with same priority can apply same time'.

Figure 225: Promotion Calculation frame of Wallet Promotion

The “Basic Promotion Conditions” frame of this promotion configuration allows unlimited number of user usage for this promotion as illustrated in **Figure 226**. Well, practically as long as Wallet amount is more than 0.

Basic Promotion Conditions

Here you can set precisely when and to what this promotion applies: this allows to automatically activate and deactivate promotions.

Published:

Yes

Start date of validity of this promotion:

 / /

End date of validity of this promotion:

 / /

Maximum uses in total (0=unlimited):

0

Maximum uses per customer (0=unlimited):

0

To which plans this promotion applies:

Applies to ALL Present AND Future Plans --

MER2

MER1

PLAN-B

PLAN-A

PAR1

CH1

How this promotion applies to items in a basket:

Apply promotion amount to all applicable items in order until promotion amount is depleted

Figure 226: Basic Promotion Conditions frame of Wallet Promotion

Hopefully, this smart promotions use case will inspire you to create your own combinations. Feel free to share these with the CBSubs community on our use cases forum area.

8.4 PUC-04 Personalized discounts based on CB field values

In this smart promotions use case we will setup a promotion that can be used to give selective one-time discounts to any specific member we wish.

The concept uses two CB text fields that will hold a personalized coupon code and a personalized percentage discount rate. The field titles are 'Coupon' and 'Discount'. We should place these fields in a backed only tab (published for Admins) so our users cannot see these items in their frontend profiles.

The “Promotions Calculation” frame of our promotion Basic tab is illustrated in **Figure 227**.

Promotion Calculation

Here you can set precisely how this promotion is applied:

Promotion Type:

Coupon Code (enter '=' for equal to CB field):

CB Field containing coupon code:

Hinting description for possible coupon code to display below the coupon field in basket:

Note:
Note: A coupon entry field will appear below the order and invoicing address on check-out **only** if the promotions' conditions allow to use a coupon for that order. So you need to test **with a user allowed to use a coupon** to even see a coupon entry field on checkout.

The promotion is:

CB Field containing percentage:

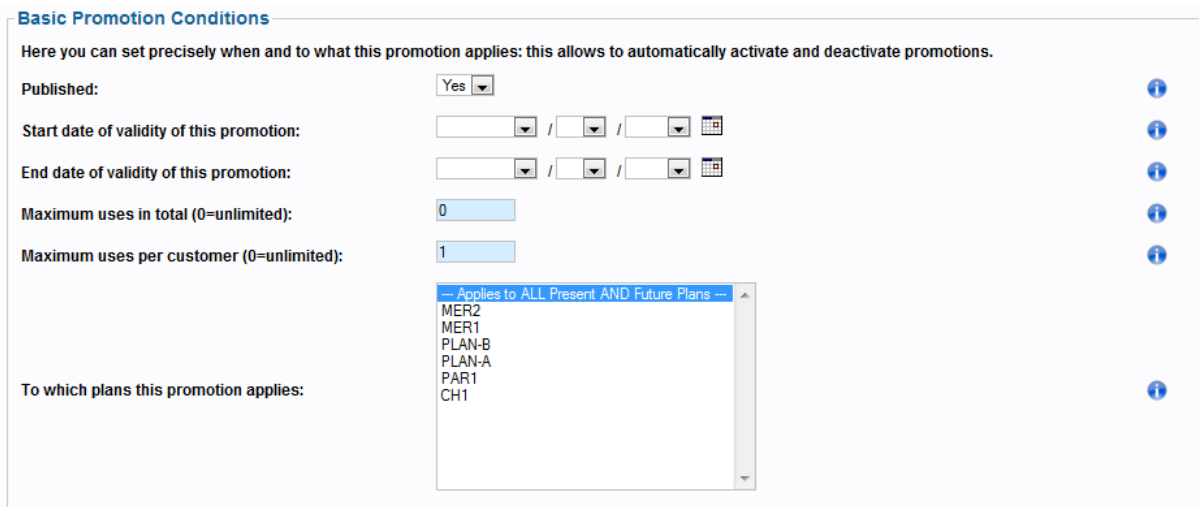
Discount priority: *

Exclusive within this priority:

Figure 227: Promotion Calculation frame of personalized promotion

In this frame we see that we have specified that the coupon code entered should be checked against the CB field titled “Coupon” for the specific user and that the discount percentage is to be taken from the CB field titled “Discount”. To “activate” this promotion for a specific user, we need to edit the user’s profile (from backend) and populate values for the two (2) CB fields. Let’s assume that we have used the values: ‘secret-coupon’ and ‘12’. Then we need to communicate privately to the user that he/she can use the ‘secret-coupon’ code to get a 12 percent discount.

In **Figure 228**, we have specified that a user may only use this promotion once (as a one-time deal).



Basic Promotion Conditions

Here you can set precisely when and to what this promotion applies: this allows to automatically activate and deactivate promotions.

Published:

Start date of validity of this promotion: / /

End date of validity of this promotion: / /

Maximum uses in total (0=unlimited):

Maximum uses per customer (0=unlimited):

To which plans this promotion applies:

- Applies to ALL Present AND Future Plans
- MER2
- MER1
- PLAN-B
- PLAN-A
- PAR1
- CH1

Figure 228: Basic Promotion Conditions of personalized promotion

The beauty of this setup is that everything is personalized and that even if a user communicates the coupon code to other users, the code will not be usable by them, because the system will try to match the entered code against the 'Coupon' field value of their profile!

8.5 PUC-05 Membership anniversary discount promotion

In the smart promotions use case example we will be offering a one-time discount for each user on their membership anniversary. The “Conditions” tab of this promotion is shown in **Figure 229**.

The screenshot displays the configuration interface for a promotion's conditions. It is titled "Existing subscriptions and CB Fields and Dates conditions".

First condition: A dropdown menu labeled "This condition:" is set to "Condition 1".

Condition 1:

- Existing subscriptions:** A section with the text "Any of the following plans subscriptions:" and a list box containing the following options: "None is needed", "PLAN-B", "PLAN-A", "PAR1", and "CH1".
- Dates / CB Fields Comparisons:** A section with four rows of configuration:
 - Date A, Field A or Value A:** Set to "Following CB field".
 - CB Field A:** Set to "Member Since".
 - Date B, Field B or Value B:** Set to "Order Date of the order wanting to use this promotion".
 - Condition 1 (> for Dates):** Set to "Birthday function: Date A Matches Month and Day but not Year of Date B".

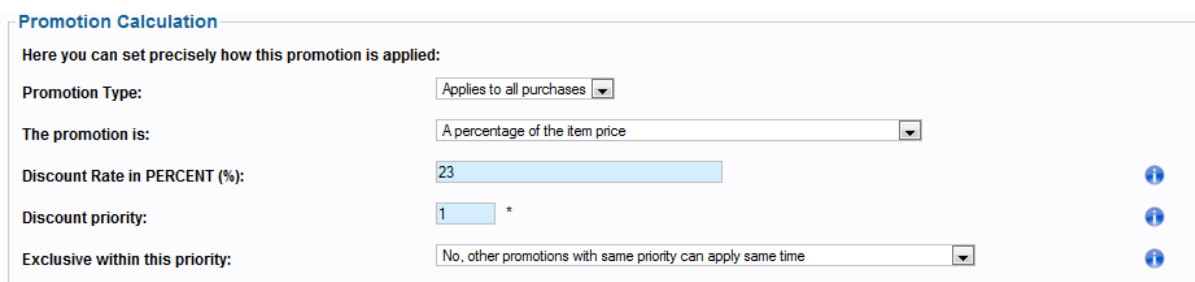
Second condition And/Or: A dropdown menu labeled "Add condition" is currently empty.

Figure 229: Anniversary Promotion Conditions tab

8.6 PUC-06 EU Members Discount Promotion

This smart promotions use case will build upon the geographical zones available in the CBSubs Tax icon area. We will automatically apply a 23% discount to all buyers from the European Union region.

This setup is illustrated in **Figure 230** and **Figure 231**.



Promotion Calculation

Here you can set precisely how this promotion is applied:

Promotion Type:

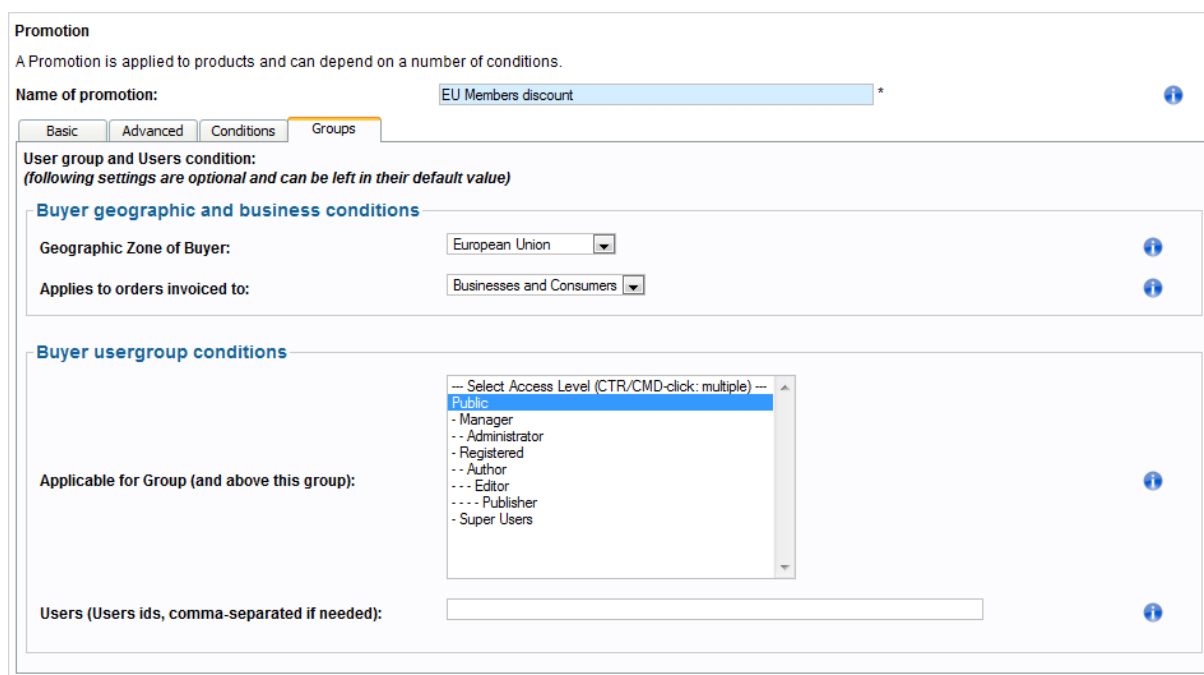
The promotion is:

Discount Rate in PERCENT (%):

Discount priority: *

Exclusive within this priority:

Figure 230: Promotion Calculation frame for EU Member Promotion



Promotion

A Promotion is applied to products and can depend on a number of conditions.

Name of promotion:

Basic Advanced Conditions **Groups**

User group and Users condition:
(following settings are optional and can be left in their default value)

Buyer geographic and business conditions

Geographic Zone of Buyer:

Applies to orders invoiced to:

Buyer usergroup conditions

Applicable for Group (and above this group):

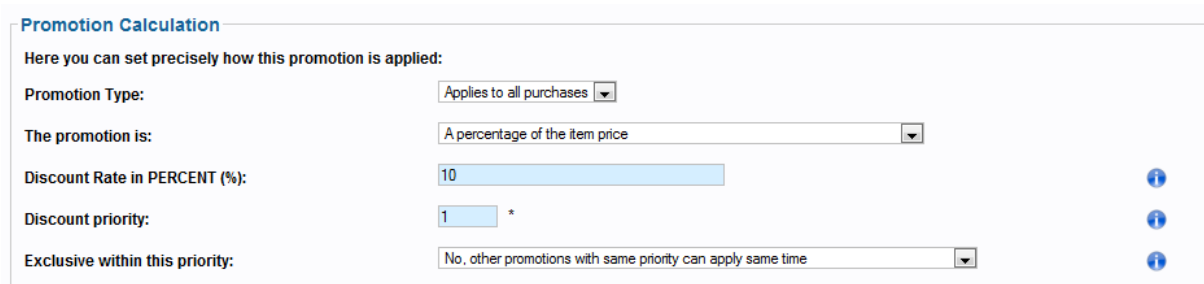
Users (Users ids, comma-separated if needed):

Figure 231: Groups tab settings for EU Member Promotion

8.7 PUC-07 Buy 2 at same time discount promotion

This smart promotion use case will give a discount on an item only if it is purchased with another item at the same time. Specifically we have two merchandise items: MER1 and MER2. We want to give a 10% discount on MER2 only if MER1 is purchased as the same time.

This setup is illustrated in **Figure 232**, **Figure 233** and **Figure 234**.



Promotion Calculation

Here you can set precisely how this promotion is applied:

Promotion Type:

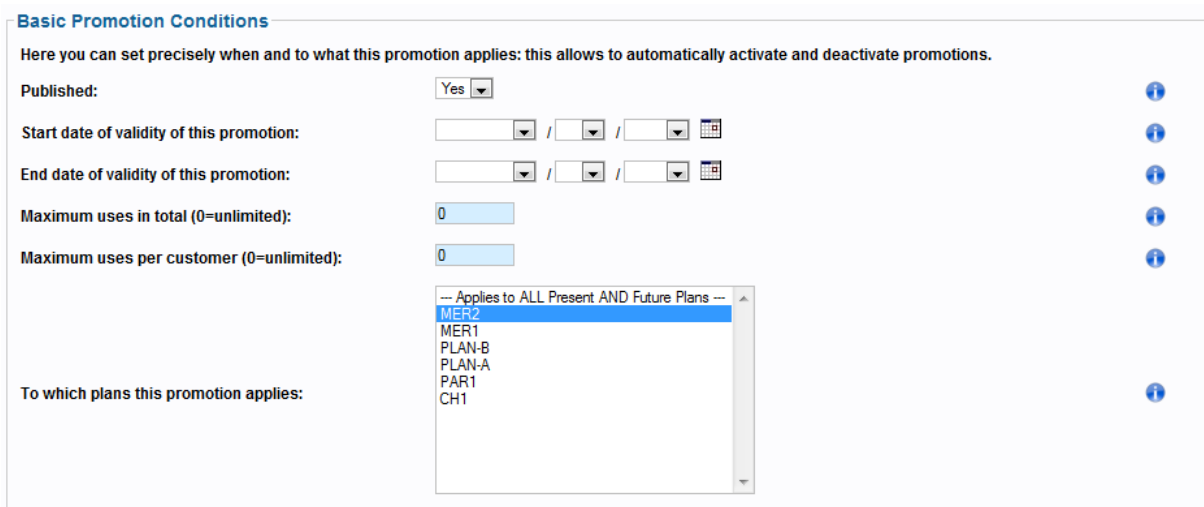
The promotion is:

Discount Rate in PERCENT (%):

Discount priority: *

Exclusive within this priority:

Figure 232: Promotion Calculation frame of Basic tab for Buy 2 Discount Promotion



Basic Promotion Conditions

Here you can set precisely when and to what this promotion applies: this allows to automatically activate and deactivate promotions.

Published:

Start date of validity of this promotion: / /

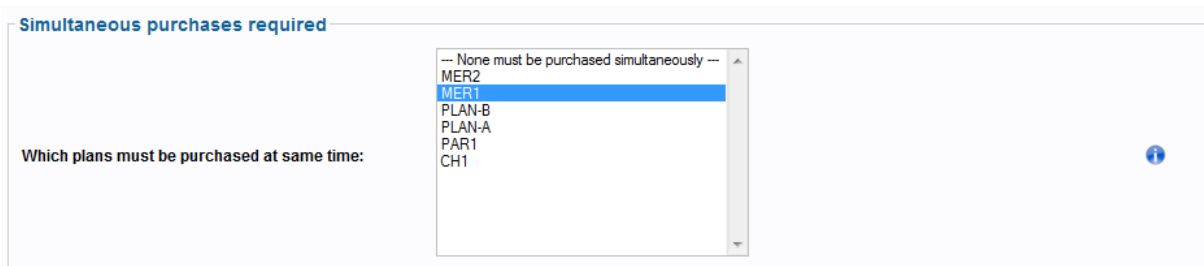
End date of validity of this promotion: / /

Maximum uses in total (0=unlimited):

Maximum uses per customer (0=unlimited):

To which plans this promotion applies:
MER2
MER1
PLAN-B
PLAN-A
PAR1
CH1

Figure 233: Basic Promotion Conditions for Buy 2 Discount Promotion



Simultaneous purchases required

Which plans must be purchased at same time:
MER2
MER1
PLAN-B
PLAN-A
PAR1
CH1

Figure 234: Simultaneous purchases required frame for Buy 2 Discount Promotion

9 Working with Mailer

The Mailer functionality supported by the CBSubs Mailer integration plugin described in **Chapter 6.22**, **Chapter 7.3.7** and **Chapter 7.18** enables you to configure many powerful automated marketing messages.

To motivate and inspire you we have included 7 Mailer use case examples with relevant settings screen shots. The summary mailer tasks for these use case examples are shown in **Figure 235**.

#	Mailer Name	Message Type	Subject	Published	Start date of validity	End date of validity	Priority	Order	Uses	Change Logs	Id
1	Welcome message sent 1 week after registration	Email	[firstname]: Welcome to our community!	✓			3	1	---	4	101
2	Birthday Wishes	Email	Happy Birthday [firstname]!	✓			3	2	---	5	104
3	Personalized message 1 month after last online date	Email	[firstname]: Last month news	✓			3	3	---	3	103
4	Subscription benefits reminder sent 3 months after subscription	Email	Your membership benefits reminder	✓			3	4	---	1	106
5	3 days before subscription expiration	Email	[firstname]: Your subscription is about to en...	✓			3	5	---	1	102
6	Subscription expiration follow-up message 10 days after expiration	Email	Your membership has expired 10 days ago	✓			3	6	---	2	107
7	Merchandise purchase 10 days after message	Email	You purchased our product - here is a discount...	✓			3	7	---	1	105

Display # 20 << Start < Prev 1 Next > End >> Results 1 - 7 of total 7

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Figure 235: Mailer Use Case Examples Summary Tasks

Mailer Use Case example #1 (MUC1) is based on the following concept idea:

- **Welcome message sent 1 week after registration**

Send your new users a followup message (in addition to CB welcome message) one week after their registration date.

The main settings for MUC1 are illustrated in **Figure 236**, **Figure 237** and **Figure 238**.

Mailer

A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.

Name of Mailer:

Welcome message sent 1 week after registration *

Basic

Conditions

Groups

Basic mailer settings:**Message****Message Type:**

Email ▾

Message subject:

[firstname]: Welcome to our community! *

Message body:

Hi [firstname],
Welcome to our family of Community Builders!
All together we can improve the best extension available for Joomla!

Send email in:

Text (recommended) ▾

Apply email/PM template:

Yes ▾

Figure 236: MUC1 - One week after registration welcome mailer message

Main Mailer Triggering Conditions

Here you can set precisely when and depending on what this mailer sends emails.

Automatically send message at following date:

1 week (7 days) after ▾ *

Relative to this date of the plans below:

Member's Sign-up Registration Date ▾ *

But do not send message if it's later than:

1 month after ▾

Maximum uses in total (0=unlimited):

0

Maximum uses per customer (0=unlimited):

0

Figure 237: MUC1 - One week after registration welcome mailer triggering

Mailer

A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.

Name of Mailer: Welcome message sent 1 week after registration

Basic | **Conditions** | Groups

Advanced Mailer Conditions for existing users:
(following settings are optional and can be left in their default value)

Existing subscriptions and CB Fields and Dates conditions

First condition: This condition:

Condition 1

Existing subscriptions

Any of the following plans subscriptions:

- None is needed
- P1
- ETP

Dates / CB Fields Comparisons

Date A, Field A or Value A: Following CB field

CB Field A: Don't send promo emails

Date B, Field B or Value B: Constant Value or String (CB substitutions can be used)

Value B: 1

Condition 1 (> for Dates): A <> B (Value A is different from Value B)

Second condition And/Or: Add condition

Figure 238: MUC1 - One week after registration welcome mailer conditions

Mailer Use Case example #2 (MUC2) is based on the following concept idea:

- **Send personalized message 1 month after last online date of user**
The concept is to identify members that appear to be away from your site and rekindle their interest to visit again.

The main settings for MUC2 are illustrated in **Figure 239**, **Figure 240** and **Figure 241**.

Mailer

A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.

Name of Mailer: Birthday Wishes *

Basic Conditions Groups

Basic mailer settings:

Message

Message Type: Email ▾

Message subject: Happy Birthday [firstname]! *

Message body:

Hi [firstname],

Our community wishes you the very best for your birthday today!

Have fun!

Birthday committee

Send email in: Text (recommended) ▾

Apply email/PM template: Yes ▾

Email attachments (absolute server paths):

From name: Party Committee

From email addresses: nant@joomlapolis.com

CC email to addresses:

BCC email to addresses:

Mailer priority: 3 *

Figure 239: MUC2 - Birthday wishes mailer message

Main Mailer Triggering Conditions

Here you can set precisely when and depending on what this mailer sends emails.

Automatically send message at following date: 5 minutes after ▾ *

Relative to this date of the plans below: Member's Sign-up Registration Date ▾ *

But do not send message if it's later than: 5 years after ▾ *

Maximum messages in total (0=unlimited): 0

Maximum messages per customer (0=unlimited): 0

Figure 240: MUC2 - Birthday wishes mailer triggering

Mailer

A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.

Name of Mailer: Birthday Wishes *

Basic **Conditions** Groups

Advanced Mailer Conditions for existing users:
(following settings are optional and can be left in their default value)

Existing subscriptions and CB Fields and Dates conditions

First condition: This condition: ⓘ

Condition 1

Existing subscriptions

Any of the following plans subscriptions: ⓘ

--- None is needed ---
P1
ETP

Dates / CB Fields Comparisons

Date A, Field A or Value A: Following CB field ⓘ

CB Field A: Birthdate ⓘ

Date B, Field B or Value B: Order Date of the order wanting to use this promotion ⓘ

Condition 1 (> for Dates): Birthday function: Date A Matches Month and Day but not Year of Date B ⓘ

Second condition And/OR: --- Add condition --- ⓘ

Figure 241: MUC2 - Birthday wishes conditions

Mailer Use Case example #3 (MUC3) is based on the following concept idea:

- **Send personalized message 1 month after last online date of user**
The concept is to identify members that appear to be away from your site and rekindle their interest to visit again.

The main settings for MUC3 are illustrated in **Figure 242** and **Figure 243**.

Mailer

A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.

Name of Mailer: Personalized message 1 month after last online date

Basic Conditions Groups

Basic mailer settings:

Message

Message Type: Email

Message subject: [firstname]: Last month news

Message body:

Hi [firstname],
As it appears you have not been able to visit us for awhile, we have compiled a summary of new developments that have happened while your were away.

Best Regards and hurry back,
Website Team

Send email in: Text (recommended)

Apply email/PM template: Yes

Figure 242: MUC3 - Personalized message 1 month after last online mailer message

Main Mailer Triggering Conditions

Here you can set precisely when and depending on what this mailer sends emails.

Automatically send message at following date: 1 month after

Relative to this date of the plans below: Member's Last Online Date

But do not send message if it's later than: 1 year after

Maximum uses in total (0=unlimited): 0

Maximum uses per customer (0=unlimited): 0

Figure 243: MUC3 - Personalized message 1 month after last online mailer triggering

Mailer Use Case example #4 (MUC4) is based on the following concept idea:

- **Subscription expiration early notification message**
Send users an early expiration notice three days before a specific CBSubs plan subscription is scheduled to end. Once again this message can be combined with a CBSubs renew before expiration discount coupon concept.

The main settings for MUC4 are illustrated in **Figure 244** and **Figure 245**.

Mailer

A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.

Name of Mailer: *

Basic | Conditions | Groups

Basic mailer settings:

Message

Message Type: *

Message subject: *

Message body:

Hi [firstname],

As your membership subscription is currently 3 months old, we would like to remind you of all the benefits and services you are entitled to ...

Send email in: *

Apply email/PM template: *

Figure 244: MUC4 - Subscription benefits reminder mailer message

Main Mailer Triggering Conditions

Here you can set precisely when and depending on what this mailer sends emails.

Automatically send message at following date: *

Relative to this date of the plans below: *

To which plans this date condition applies:

--- Applies to ALL Present AND Future Plans ---

P1
ETP
MP1

Must be in state:

--- Not relevant ---

Active
Registered Unpaid
Expired
Unsubscribed
Upgraded to other
Invalid

But do not send message if it's later than: *

Maximum uses in total (0=unlimited):

Maximum uses per customer (0=unlimited):

Figure 245: MUC4 - Subscription benefits reminder mailer triggering

Mailer Use Case example #5 (MUC5) is based on the following concept idea:

- **Subscription expiration follow-up message**

A CBSubs membership subscription has recently ended and user appear to have chosen not to renew. Send a message to such users 10 days after

expiration and thank them for their past membership, give them a gift perhaps and make another last offer attempt to get them to renew.

The main settings for MUC5 are illustrated in **Figure 246** and **Figure 247**.

Mailer

A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.

Name of Mailer: 3 days before subscription expiration *

Basic Conditions Groups

Basic mailer settings:

Message

Message Type: Email ▾

Message subject: [firstname]: Your subscription is about to end *

Message body:

Hi [firstname],
Your membership subscription is about to end.
This is your chance to renew early and save.
Just use the "RENEW-EARLY" coupon code now and save 25% off regular membership renewal price.

Coupon is only valid before your subscription ends, so act now!

Sincerely,
website membership team

Send email in: Text (recommended) ▾

Apply email/PM template: Yes ▾

Figure 246: MUC5 - Just before expiration notification mailer message

Main Mailer Triggering Conditions

Here you can set precisely when and depending on what this mailer sends emails.

Automatically send message at following date: 3 days before ▾ *

Relative to this date of the plans below: Subscription's subscription Date ▾ *

To which plans this date condition applies:

--- Applies to ALL Present AND Future Plans ---
P1
ETP
MP1

Must be in state:

--- Not relevant ---
Active
Registered Unpaid
Expired
Unsubscribed
Upgraded to other
Invalid

But do not send message if it's later than: And no other date condition ▾

Maximum uses in total (0=unlimited): 0

Maximum uses per customer (0=unlimited): 0

Figure 247: MUC5 - Just before expiration notification mailer triggering

Mailer Use Case example #6 (MUC6) is based on the following concept idea:

- **Subscription expiration follow-up message**

A CBSubs membership subscription has recently ended and user appear to have chosen not to renew. Send a message to such users 10 days after expiration and thank them for their past membership, give them a gift perhaps and make another last offer attempt to get them to renew.

The main settings for MUC6 are illustrated in **Figure 248** and **Figure 249**.

Mailer

A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.

Name of Mailer: Subscription expiration follow-up message 10 days after expir *

Basic Conditions Groups

Basic mailer settings:

Message

Message Type: Email

Message subject: Your membership has expired 10 days ago *

Message body:

Hi [firstname],

Your membership has expired 10 days ago and you have chosen not to renew.

We do value your past support and thank you for it.

Here is a free gift for you and a coupon just in case you want to reconsider.

Send email in: Text (recommended)

Apply email/PM template: Yes

Figure 248: MUC6 - Expiration follow-up mailer message

Main Mailer Triggering Conditions

Here you can set precisely when and depending on what this mailer sends emails.

Automatically send message at following date: 10 days after *

Relative to this date of the plans below: Subscription's Expiry Date *

To which plans this date condition applies:

--- Applies to ALL Present AND Future Plans ---

P1
ETP
MP1

Must be in state:

--- Not relevant ---

Active
Registered Unpaid
Expired
Unsubscribed
Upgraded to other
Invalid

But do not send message if it's later than: 30 days after

Maximum uses in total (0=unlimited): 0

Maximum uses per customer (0=unlimited): 0

Figure 249: MUC6 - Expiration follow-up mailer triggering

Mailer Use Case example #7 (MUC7) is based on the following concept idea:

- **Merchandise sale follow-up message**

Some CBSubs membership sites also offer product sales (as CBSubs merchandise plans). These are paying customers that you can target and send them a message 10 days after their purchase with upgrade offer discount for one of your subscription plans (once again using CBSubs Smart Promotions).

The main settings for MUC7 are illustrated in **Figure 250** and **Figure 251**.

The screenshot shows the 'Mailer' configuration interface. At the top, it states: 'A Mailer sends automated timed emails or PMs depending on a given registration, subscription, renewal or expiration date for plans and can depend on a number of conditions.' Below this, the 'Name of Mailer:' field is set to 'Merchandise purchase 10 days after message'. The interface has three tabs: 'Basic', 'Conditions', and 'Groups'. The 'Basic' tab is active, showing 'Basic mailer settings:'. Under this, the 'Message' section is expanded. The 'Message Type:' is set to 'Email'. The 'Message subject:' is 'You purchased our product - here is a discount to'. The 'Message body:' contains the text: 'Hi [firstname],
You have recently bought a product from our site.
Did you know that the same product is included in our membership subscription?
Upgrade now and get 20% off.' The 'Send email in:' is set to 'Text (recommended)'. The 'Apply email/PM template:' is set to 'Yes'. There are information icons (i) next to the subject, body, and template settings.

Figure 250: MUC7 - Merchandise purchase after sales mailer message

Main Mailer Triggering Conditions
Here you can set precisely when and depending on what this mailer sends emails.

Automatically send message at following date:

10 days after

*

Relative to this date of the plans below:

Merchandise's or Donation's Payment Date

*

--- Applies to ALL Present AND Future Plans ---
P1
ETP
MP1

To which plans this date condition applies:

Must be in state:

Active
Registered Unpaid
Expired
Unsubscribed
Upgraded to other
Invalid

Not relevant

But do not send message if it's later than:

1 month after

Maximum uses in total (0=unlimited):

0

Maximum uses per customer (0=unlimited):

0

Figure 251: MUC7 - Merchandise purchase after sales mailer triggering

10 Working with the CBSubs™ Fields Integration Plugin

The **CBSubs CB Field** plugin described in **Chapter 6.4** and **Chapter 7.5.6.6** allows you to perform various operations on CB Fields triggered by **CBSubs™** subscription events. Should you need to learn more about CB in general and CB Fields in particular, you should subscribe to the CB Documentation by following the process described in **Chapter 1.7**.

As illustrated in **Figure 252**, you can select any CB field on your site (via a drop-down selection mechanism) and perform one of the following operations (also selectable using a drop-down mechanism):

- Give the CB field of a subscriber to a **CBSubs™** plan a specific value (thus over-writing any previous field contents)
- Add a specific value to the existing contents of a CB field. This has meaning if the CB field being manipulated is an integer field.
- Subtract a specific value from existing field value (also applicable for integer fields)
- Multiply a specific value with the value of an existing field and place product as new field value (applicable for integer fields)
- Divide field value by a specified value and place results in field.

CB fields changing on plan activation and deactivation:

Field 1	Field:	df90		
	Value:			cbfields_increment1
	Remove value on plan deactivation:	Yes		
	Operator:			
		Set: Field = Value		
		Add: Field = Field + Value		
		Subtract: Field = Field - Value		
		Multiply: Field = Field x Value		
		Divide: Field = Field / Value		
Field 2	Field:			

Set how the new value is handled. Only applies to integer field types. All other field types assumed Set.

Figure 252: CB Field Operations

In order to take advantage of this integration you need to be aware of the actual type of CB field you will be operating on. For example a CB single checkbox field is in fact a binary field that is set to 1 for true (checked) and 0 for false (unchecked).

Some of the use cases that can be implemented using this integration include:

- Setting the value of a CB text field when a user subscribes to a **CBSubs™** plan and removing it when subscription ends
- Adding a value to a CB integer field when a user subscribes to a **CBSubs™** plan

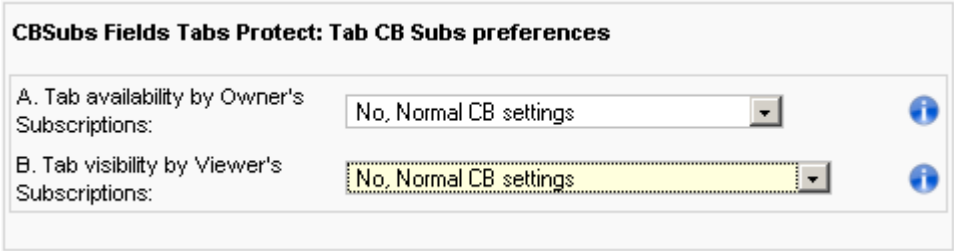
11 Working with the CB Fields and Tabs Protection Plugin

The **CBSubs Fields Tabs Protect** plugin we installed back in **Chapter 6.10** operates in a different manner compared with other **CBSubs™** integration plugins. This plugin appears from a user interface perspective as extra parameters available in CB Fields management and CB Tabs management areas when editing CB fields and CB Tabs. All CB fields and Tabs (even core CB ones and Tabs created by third party CB plugins) will inherit these parameters. We will be discussing these parameters in the remaining part of this chapter focusing on CB Tabs but everything is also applicable for CB fields.

Before we start describing this rather difficult concept we need to understand right off the bat that by default CB Tabs and CB Fields are automatically available to all user profiles. Correction: if a user is in the same CMS ACL group (or above) as the restriction placed on the CB Tab (*'User Group to allow access to:'*), then by default the CB Tab (and all CB Fields in it) are available for this user. This is our starting point.

Once again: Remember all CB Tabs (and the CB Fields placed in them) are by default available to all users in the same CMS ACL group (or above).

All CB fields and tabs will initially inherit 2 extra parameters which in essence turn-off any **CBSubs Fields Tabs Protect** integration plugin involvement leaving things as they were.



CBSubs Fields Tabs Protect: Tab CB Subs preferences

A. Tab availability by Owner's Subscriptions: No, Normal CB settings

B. Tab visibility by Viewer's Subscriptions: No, Normal CB settings

Figure 253: CBSubs™ Fields Tabs Protect default tab availability and visibility parameters

These 2 extra parameters are shown in **Figure 253** for CB tabs are:

- **A. Tab availability by Owner's Subscriptions:**

Available options via drop-down setting are:

- *No, Normal CB settings (default)*
- *Yes, CB subs control tab availability*
- *Yes, CB subs control detailed tab access*

- **B. Tab visibility by Viewer's Subscriptions:**

Available options via drop-down setting are:

- *No, Normal CB settings (default)*
- *Yes, viewer's CB subs control tab visibility*
- *Yes, viewer's CB subs control detailed visibility*

Once again we need to understand some basic concepts. The first parameter above (A) controls the availability of a CB Tab/Field on a CB profile. By default it is specified that No **CBSubs™** interference will take place and CB settings prevail. We can specify that **CBSubs™** controls the availability (provisioning) of a CB Tab/Field and we can also specify a more detailed level of control. This is an extremely powerful mechanism to basically create different user profiles based on **CBSubs™** plans the profile owner is subscribed to and also the **CBSubs™** plans the profile viewer is subscribed to. It is best to keep some potential use cases in mind as we continue describing the various parameter settings available. So, as we continue try to envision using the parameters to configure the following potential cases:

- Configure a CB Tab/Field that is only available for subscribed members
- Configure a CB Tab/Field that is only available for subscribed members of Plan A and that only members of Plan B can see on other user profiles (example paid agency plan subscribers can see the model availability tab)

Figure 254: CBSubs™ Fields Tabs Protect tab availability controls

If in **Figure 253** we select the option 'Yes, *CB subs control tab availability*' for the **A. Tab availability by Owner's Subscriptions:** parameter we will see a new '**A. Availability depending on profile Owner's subscriptions**' frame automatically appear. This new situation is illustrated in **Figure 254**. This new frame has two field sets in it titled: '**1) For other viewers:**' and '**2) For Profile owner himself:**'.

The '**1) For other viewers:**' field set has the following one parameter:

- **Negative access message to owner:**
Message to show tab owner when tab is controlled and user has no access.
- **Positive access message to visitor:**
Message to show to visitor (viewer not owner) when tab is controlled and user has access.
- **Negative access message to visitor:**
Message to show to visitor (viewer not owner) when tab is controlled and user does not have access.
- **Owner Plans controlling tab availability in profile:**
This setting is controlled by a multi-select area box that contains all **CBSubs™**

plans available and applicable (published). This option allows us to specify which **CBSubs™** plan membership permits the availability of this tab in their profile.

The **'2) For Profile owner himself:'** field set has the following parameters:

- **Still Available for Profile owner himself:**

This setting specifies if the plan protection settings should be overridden for the actual profile owner (this is the profile owner provisioned with a tab can have tab availability privileges even if the owner is not subscribed in the plan specified in **'Owner Plans controlling tab availability in profile:'** parameter. Remember our initial statement in the beginning of this chapter. By default all CB Tabs are available to all users. So this parameter basically says, that even if we specify to protect this CB Tab making it available only for specific **CBSubs™** subscribers, it will still be available for all profile owners (even those not subscribed to the specific plan). Think of a CB Tab that we can see in our profile, but we cannot see in other profiles of users (also) not subscribed to the specific plan. And vice versa: users viewing our profile cannot see this CB Tab, because we are not subscribers in the specific plan.

- **Positive access message to Owner:**

This parameter accepts a text string that will be displayed during edit mode and profile view mode to remind the editor that this Tab is available because of a plan subscription.

CBSubs Fields Tabs Protect: Tab CB Subs preferences

A. Tab availability by Owner's Subscriptions: Yes, CB subs control detailed tab access

A. Availability depending on profile Owner's subscriptions

1) For other viewers:

Negative access message to Owner:

Positive access message to Visitor:

Negative access message to Visitor:

Owner Plans controlling tab available in profile:
 --- Select Plans/Products (CTR/CMD-click: multiple) ---
 Plan-A
 Plan-B
 P1
 P2

2) For Profile owner himself:

Still Available for Profile Owner himself: Yes: owner's tab available for profile owner

Owner plans controlling tab editable (none means not controlled):
 --- Select Plans/Products (CTR/CMD-click: multiple) ---
 Plan-A
 Plan-B
 P1
 P2

Positive access message to Owner (CB 1.2 : Edit mode only, CB 1.2.1: Profile view mode too):

3) For Moderators:

Still Visible for Moderators: No: moderators can see tab

Still Editable for Moderators: No: moderators can edit tab

B. Tab visibility by Viewer's Subscriptions: No, Normal CB settings

Figure 255: CBSubs™ Fields Tabs Protect tab detailed availability control

If in **Figure 253** we select the option 'Yes, CB subs control detailed tab access' for the **A. Tab availability by Owner's Subscriptions:** parameter we will see a new **A. Availability depending on profile Owner's subscriptions** frame automatically appear. This new situation is illustrated in **Figure 255**. This new frame has three field sets in it (instead of 2 that were present in **Figure 254**) titled: '**1) For other viewers:**' and '**2) For Profile owner himself:**' and '**3) For Moderators:**'.

This new situation is illustrated in **Figure 255**. Thus, when we specify a value of 'Yes, CB subs control detailed tab access' for the **A. Tab availability by Owner's**

Subscriptions: parameter we have three field sets and parameters available for our CB tab configuration:

The **'1) For other viewers:'** field set contains the following field parameter:

- **Owner Plans controlling tab availability in profile:**

This setting is controlled by a multi-select area box that contains all **CBSubs™** plans available and applicable (published). This option allows us to specify which **CBSubs™** plan membership permits the availability of this tab in their profile.

The **'2) For Profile owner himself:'** field set contains the following field parameters:

- **Still Available for Profile Owner himself:**

This parameter accepts one of two options selectable from a drop-down list field containing the following values:

- *Yes: owner's tab available for profile owner*
- *No: profile owner himself also restricted*

- **Owner plans controlling tab editable (none means not controlled):**

This setting is controlled by a multi-select area box that contains all **CBSubs™** plans available and applicable (published). This option allows us to specify that even though a CB tab is available for someone (see previous parameter) another membership might be needed to actually edit CB Tab contents.

- **Positive access message to Owner:**

This parameter accepts a text string that will be displayed during edit mode and front-end profile view mode also to remind the editor that this Tab is available because of a plan subscription.

The **'3) For Moderators:'** field set contains the following field parameter:

- **Still Visible for Moderators:**

This setting is controlled by a drop-down select field which can be set to one of the following options:

- *No: moderators can see tab (default)*
- *Yes: moderators are also restricted*

- **Still Editable for Moderators:**

- *No: moderators can edit tab (default)*
- *Yes: moderators are also restricted*

The settings discussed up to now in this section were used to configure the availability of a CB Tab based on active membership to specific **CBSubs™** plans. The rest of the settings to be discussed are used to configure the visibility thanks to viewer's subscriptions.

CBSubs Fields Tabs Protect: Tab CB Subs preferences

A. Tab availability by Owner's Subscriptions: No, Normal CB settings

B. Tab visibility by Viewer's Subscriptions: Yes, viewer's CB subs control tab visibility

B. Visibility depending on Viewer's subscriptions

1) For other viewers:

Viewer Plans controlling tab visibility by viewer (none means not controlled):

--- Select Plans/Products (CTR/CMD-click: multiple) ---

Plan-A

Plan-B

P1

P2

2) For Profile owner himself:

Still Viewable for Profile Owner himself: Yes: profile owner can still view his own tab

Figure 256: CBSubs™ Fields Tabs Protect tab visibility controls

If in **Figure 253** we select the option '*Yes, viewer's CB subs controls tab visibility*' for the **B. Tab visibility by Viewer's Subscriptions:** parameter we will see a new **B. Visibility depending on Viewer subscriptions** frame automatically appear along with two field sets in it. This new situation is illustrated in **Figure 256**. This new frame and the two field sets are:

The '**1) For other viewers:**' field set contains the following field parameter:

- **Viewer Plans controlling tab visibility by viewer (none means not controlled):**

This setting is controlled by a multi-select area box that contains all **CBSubs™** plans available and applicable (published). This option allows us to specify which **CBSubs™** plan memberships are permitted to view this tab when viewing ***other*** user profiles. This means that one plan can control the availability of a CB tab and another can control by whom this tab is viewable!

The '**2) For Profile owner himself:**' field set contains the following field parameter:

- **Still Viewable for Profile Owner himself:**

This parameter accepts one of two options selectable from a drop-down list field containing the following values:

- *Yes: profile owner can still view his own tab*
- *No: profile owner himself is also restricted*

With these settings we can actually control which members can see a provisioned CB Tab/Field (this was discussed earlier) based on their membership subscription. Think of a situation where we have given all users a gallery tab but charge members to actually see other user's gallery tabs.

We will now continue with the detailed control of CB Tab/Field visibility settings description.

CBSubs Fields Tabs Protect: Tab CB Subs preferences

A. Tab availability by Owner's Subscriptions:

B. Tab visibility by Viewer's Subscriptions:

B. Visibility depending on Viewer's subscriptions

1) For other viewers:

Viewer Plans controlling tab visibility by viewer (none means not controlled):
 Plan-A
 Plan-B
 P1
 P2

Viewer Plans controlling tab searchable (none means not controlled):
 Plan-A
 Plan-B
 P1
 P2

2) For Profile owner himself:

Still Viewable for Profile Owner himself:

3) For Moderators:

Still Viewable for Moderators:

Figure 257: CBSubs™ Fields Tabs Protect tab detailed visibility controls

If in **Figure 253** we select the option 'Yes, viewer CB subs controls detailed visibility' for the **B. Visibility depending on Viewer's subscriptions:** frame, we will see that the three new field sets will appear. This new situation is illustrated in **Figure 257**.

The '**1) For other viewers:**' field set contains the following field parameters:

- **Viewer Plans controlling tab visibility by viewer (non means not controlled):**

This setting is controlled by a multi-select area box that contains all **CBSubs™** plans available and applicable (published). This option allows us to specify which **CBSubs™** plan membership is permitted to view this CB tab when viewing *other* user profiles. This means that one plan can control the availability of a CB tab and another can control by whom this tab is viewable!

- **Viewer Pans controlling tab searchable (none means not controlled):**

This setting is controlled by a multi-select area box that contains all **CBSubs™**

plans available and applicable (published). This option allows us to specify which members can perform CB list searches on contents of this tab.

The '**2) For Profile owner himself:**' field set contains the following field parameter:

- **Still Viewable for Profile Owner himself:**

This parameter accepts one of two options selectable from a drop-down list field containing the following values:

- *Yes: profile owner can still view his own tab*
- *No: profile owner himself is also restricted*

The '**3) For Moderators:**' field set contains the following field parameter:

- **Still Viewable for Moderators:**

This setting is controlled by a drop-down select field which can be set to one of the following options:

- *No: moderators are also restricted (default)*
- *Yes: moderators can still view tabs*

As you can see this **CBSubs Fields Tabs Protect** integration plugin is very powerful and allows you to use **CBSubs™** to provision CB tabs and CB fields based on **CBSubs™** plans. You can also further specify which plan members can actually see these CB tabs and/or CB fields. You can use this method to indirectly create different profiles for specific member groups.

Some ideas and possibilities include:

- Students and Teachers. Some tabs or fields should be available only for students while other tabs/fields should be available only for teachers. Also some student tabs/fields should not be viewable by other students but should be viewable by all teachers.

- Models and Agencies. Free model membership may give models limited tabs. Upgrading to a paid plan might be used to provision extra tabs to make models more “marketable” for Agency viewers.

Hopefully the above will trigger your imagination and help you realize your specific business scenario.

This is a very important concept, so let’s give as many examples as possible to help us understand better. Let’s assume that we have 2 **CBSubs™** subscription plans, **PLAN-A** and **PLAN-B**. Also, let’s assume that **Jack** and **Jill** are subscribers of **PLAN-A** and **Adam** and **Eve** are subscribers of **PLAN-B**. Based on this concept and color coding we have prepared a number of TAB protection parameter combinations for a fictitious CB Tab (Tab-X) along with the expected results.

A. Tab availability by Owner's Subscriptions:	<ul style="list-style-type: none"> Jack and Jill and Adam and Eve all have Tab-X in their profiles and can see Tab-X when viewing each other’s profiles
No, Normal CB Settings	
B. Tab visibility by Viewer's Subscriptions:	
No, Normal CB Settings	

Figure 258: Tab Protection default case

A. Tab availability by Owner's Subscriptions:	<ul style="list-style-type: none"> Jack and Jill can see Tab-X in their profiles and in each others profiles Adam and Eve cannot see Tab-X in their profiles or each others profiles Adam and Eve can see Tab-X in the profiles of Jack and Jill Jack and Jill cannot see Tab-X in the profiles of Adam and Eve
Yes, CB subs control tab availability	
1) For other viewers:	
Owner Plans controlling tab available in profile:	
PLAN-A	
1) For Profile owner himself:	
Still Available for Profile Owner himself:	
No, profile owner himself is also restricted	
B. Tab visibility by Viewer's Subscriptions:	
No, Normal CB Settings	

Figure 259: Tab Protection PLAN-A get tab

A. Tab availability by Owner's Subscriptions:	<ul style="list-style-type: none"> Jack and Jill and can see Tab-X in their profiles and in each others profiles
Yes, CB subs control tab availability	
1) For other viewers:	<ul style="list-style-type: none"> Adam and Eve can see Tab-X in their

Community Builder Paid Subscriptions System

Owner Plans controlling tab available in profile:	profiles but not in each others profiles
PLAN-A	
2) For Profile owner himself:	<ul style="list-style-type: none"> • Adam and Eve can see Tab-X in the profiles of Jack and Jill
Still Available for Profile Owner himself:	
Yes, owner's tab available for profile owner	<ul style="list-style-type: none"> • Jack and Jill cannot see Tab-X in the profiles of Adam and Eve
B. Tab visibility by Viewer's Subscriptions:	
No, Normal CB Settings	

Figure 260: Tab Protection PLAN-A get tab and also owners see their own

A. Tab availability by Owner's Subscriptions:	
Yes, CB subs control tab availability	
1) For other viewers:	
Owner Plans controlling tab available in profile:	
PLAN-A	<ul style="list-style-type: none"> • Jack and Jill and can see Tab-X in their profiles but not in each others profiles
1) For Profile owner himself:	
Still Available for Profile Owner himself:	<ul style="list-style-type: none"> • Adam and Eve can see Tab-X in their profiles but not in each others profiles
Yes, owner's tab available for profile owner	
B. Tab visibility by Viewer's Subscriptions:	<ul style="list-style-type: none"> • Adam and Eve can see Tab-X in the profiles of Jack and Jill
Yes, viewer's CB subs control tab visibility	
1) For other viewers:	<ul style="list-style-type: none"> • Jack and Jill cannot see Tab-X in the profiles of Adam and Eve
Viewer Plans controlling tab visibility by viewer:	
PLAN-B	
2) For Profile owner himself:	
Still Viewable for Profile Owner himself:	
Yes, profile owner can still view his own tab	

Figure 261: Tab Protection PLAN-A get tab and PLAN-B can see it

As you can see there are many possibilities and permutations that create an extremely powerful result. Hopefully, you can configure things to support your specific use case.

12 Protecting CMS Content with CBSubs™

As described in **Chapter 6.15**, **Chapter 7.3.8.1** and **Chapter 7.5.6.3**, CBSubs™ has mechanisms to protect your CMS content (articles, extensions, menus, modules etc.) and make these content items accessible only to specific CBSubs™ plan subscribers.

There are a number of parameters that control the actual content protection mechanism. Also, these parameters are introduced in CBSubs™ administration panels with the installation of the **CBSubs Content** Integration plugin (see **Chapter 6.15**).

One of the first parameters we would need to configure is the:

- ‘**Still show intro text for articles:**’ parameter is located in the ‘Content/Extension’ integration sub-tab of the General settings icon area as described in Chapter **7.3.8.1**. The most common use case would be to set this parameter to show the introductory part of the article (before the Read more... part) and redirect the viewer to the needed plan subscription area (registration or upgrade) if insufficient privileges exist.

When creating a Joomla 1.5.x article, you can use the Read More... button in the lower part of the editor window (next to the Image and Pagebreak buttons) to instruct Joomla to put a Read more... link separating the article in two. The first part is typically referred to as the introductory part. This concept is illustrated in **Figure 262** where we see the red line (generated by clicking on the Read more... button) separating the article in two. In Joomla 1.0.x and Mambo, a similar concept exists but is implemented as a separate editor for each section (so no Read more button exists).

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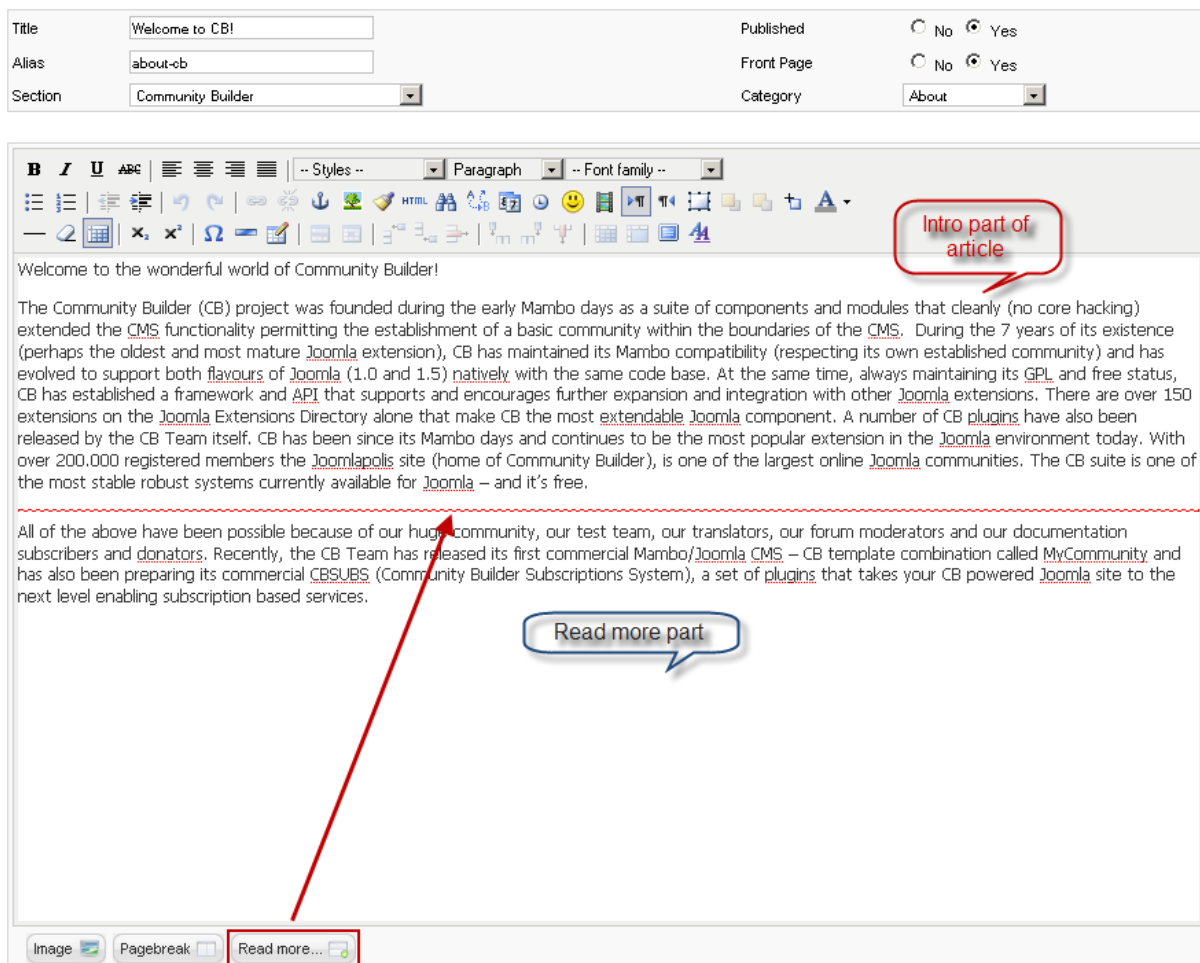


Figure 262: Article with Read more ... portion

Now, in order to protect the article illustrated in **Figure 262** we need to specify it in the plan integration content sub-tab READ: By Content area as illustrated in **Figure 263**.

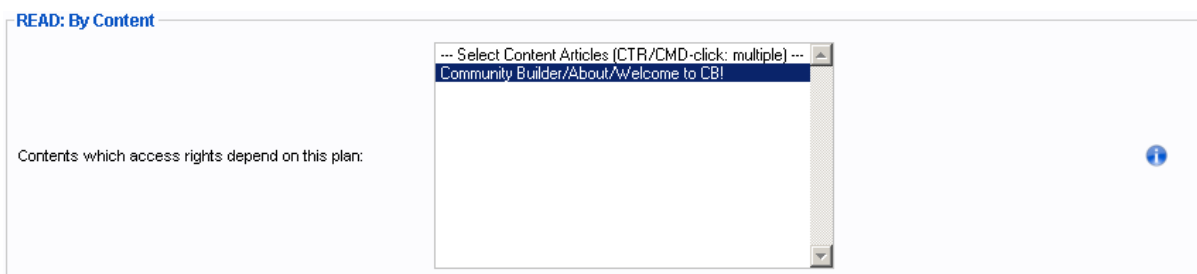


Figure 263: Protecting specific article

These settings will produce the result illustrated in **Figure 264**, where we see that the Joomla 'read more' link has changed to:

'To read more, a subscription is needed: Click here to subscribe >>'. By clicking on this link, the user is taken to the registration or upgrade plan area in order to be able to apply for plan (or plans) that grant the necessary privileges to see the article. The actual wording used in this link is controlled by the **CBSubs™** language plugin and can be modified to suite your specific website. See **Chapter 16** for language plugin modifications.

Welcome to CBI

Written by Administrator

Friday, 01 May 2009 21:01



Welcome to the wonderful world of Community Builder!

The Community Builder (CB) project was founded during the early Mambo days as a suite of components and modules that cleanly (no core hacking) extended the CMS functionality permitting the establishment of a basic community within the boundaries of the CMS. During the 7 years of its existence (perhaps the oldest and most mature Joomla extension), CB has maintained its Mambo compatibility (respecting its own established community) and has evolved to support both flavours of Joomla (1.0 and 1.5) natively with the same code base. At the same time, always maintaining its GPL and free status, CB has established a framework and API that supports and encourages further expansion and integration with other Joomla extensions. There are over 150 extensions on the Joomla Extensions Directory alone that make CB the most extendable Joomla component. A number of CB plugins have also been released by the CB Team itself. CB has been since its Mambo days and continues to be the most popular extension in the Joomla environment today. With over 200.000 registered members the JoomlaPolis site (home of Community Builder), is one of the largest online Joomla communities. The CB suite is one of the most stable robust systems currently available for Joomla – and it's free.

To read more, a subscription is needed: Click here to subscribe >>

Figure 264: Appearance of protected article

Another content control mechanism available in **CBSubs™** is the '**By Menu**' protection concept that allows you to select menu items that are protected by a **CBSubs™** plan. This is illustrated in **Figure 265** where we have protected the Download menu item of our topmenu.

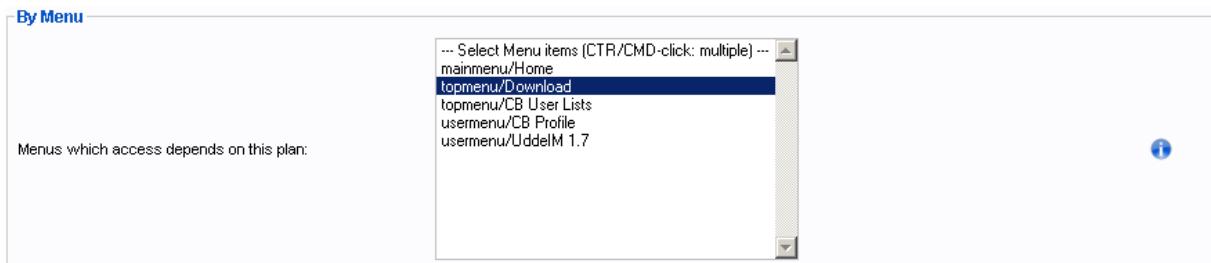


Figure 265: Protecting a CMS menu

The end result of this menu protection is illustrated in **Figure 266** where we see that if a non authorized user (meaning a user not subscribed in the proper **CBSubs™**

plan) clicks on this protected menu item, then a Warning message is displayed and the proper Registration (or plan upgrade) form is displayed prompting the user to upgrade in order to gain access to the restricted item.

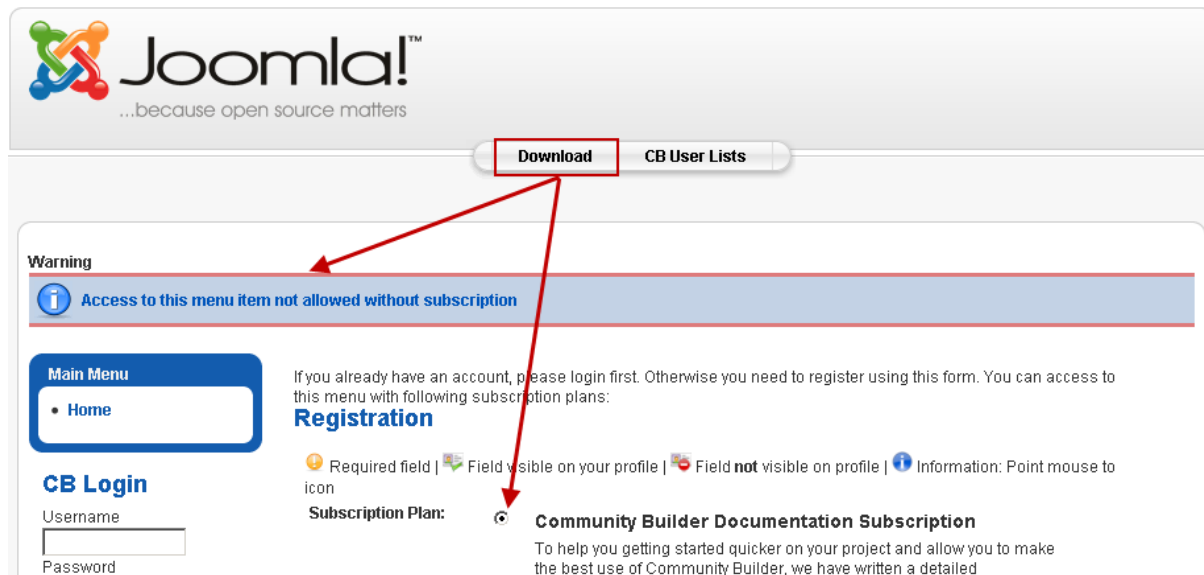


Figure 266: Appearance of protected menu access attempt

The '**By Module**' protection concept, located in the 'Extensions' Integration sub-tab of a plan, has a slightly different behaviour in the sense that the **CBSubs™** system actually hides the module from non authorized viewers. So, if for example we choose to protect the uddelM Mailbox module as illustrated in **Figure 267**, we will notice that the module is not displayed at all if the user viewing is not subscribed to the proper **CBSubs™** plan.

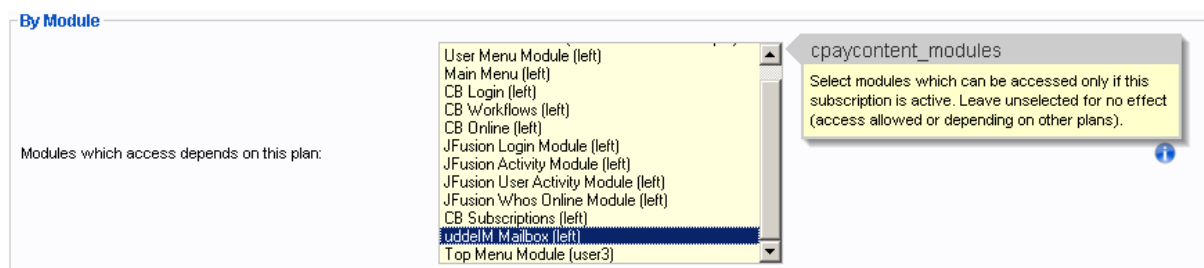


Figure 267: Protecting a module

This is illustrated in **Figure 268**, where we have placed side by side the left column of our website and we see that one user sees the **uddeIM Mailbox** module and the other see no trace of this module.

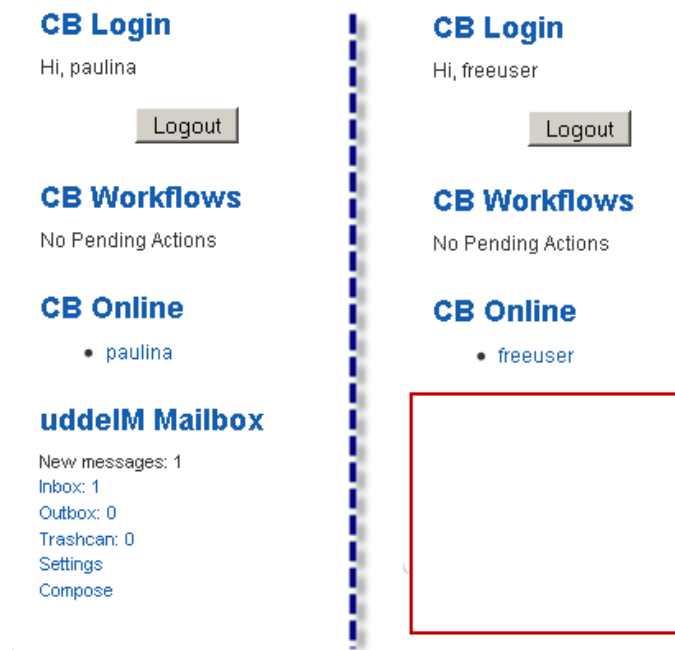


Figure 268: Protected module not displayed

Another powerful protection concept also located in the 'Extensions' sub-tab right after the '**By Module**' mechanism is the '**By URL parts**' mechanism. This concept allows us to restrict specific functions of CMS extensions by restricting access to them using the URL portion that leads us to this functionality. A simple example is illustrated in **Figure 269** where we have created a menu item pointing to the CB User Lists functionality of CB. The actual URL that appears in the status bar when hovering over the CB User Lists menu item in this figure has the portion '`option=com_comprofiler&task=userslist`' in it. This URL portion is used as a URL part line in **Figure 270**.

This way, when an unauthorized member clicks on the CB User Lists menu item **CBSubs™** will redirect the user to upgrade in order to view. *We should note that (in this specific example) the same end result could be accomplished by protecting the actual menu item, instead of using the URL protection.*



Figure 269: CB User List URL part

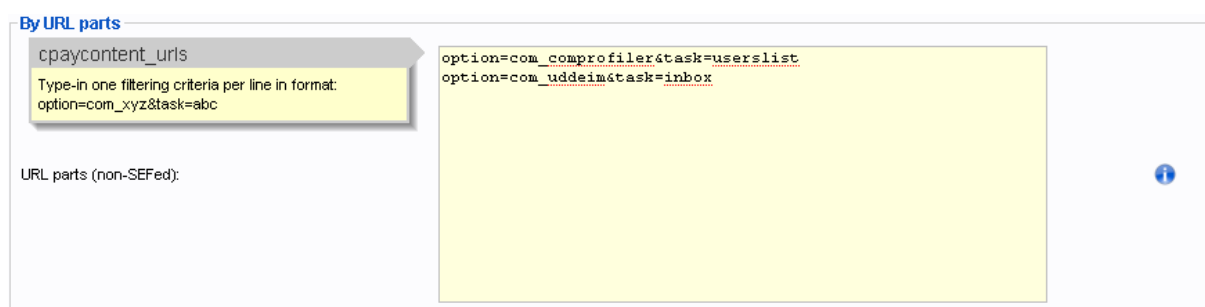


Figure 270: By URL parts protection

In **Figure 270** we also protect the inbox URL of an installed uddelM (private messaging) component.

As you can see the entire system gives us incredible control over our website content in a very clean and hack-free manor.

13 Handling Off-line Payments

Some use cases will call for handling of off-line payments. All payments that are not made via online payment gateways like PayPal, Authorize.net or YellowPay are considered as off-line. An 'Off-line' payment gateway must be configured in your Payment Gateway panel (see **Chapter 7.4.6**).

Assuming that an offline payment gateway has been properly configured (see **Chapter 7.4.6**) and we have one merchandise plan and one donation plan (see **Chapter 7.5**), we could easily have a CB subscription profile tab that looks like the case illustrated in **Figure 271**.

The screenshot shows a user profile interface with a navigation bar at the top containing tabs: Contact Info, Connections, Personal, Privacy Tab, Profile Gallery, ProfileBook, ProfileBlog, ProfileWall, and Subscription. The 'Subscription' tab is active. Below the navigation bar, the heading 'Your Subscriptions' is displayed. Underneath, the text 'Your current subscription upgrade possibilities:' is followed by two items, each with a checkbox:

- ☐ **Merchandise #001**
This merchandise item can be purchased and immediately downloaded from our site.
USD 100.00 for item
- ☐ **Donation Plan**
Donate for the cause!
Donation **USD 10.00** - You can donate as many times as you want!

Below these items is a button labeled 'BUY / DONATE'. Under the button, the heading 'Your invoices of last 6 months' is shown, followed by a link: [Click here to view the list of invoices](#).

Figure 271: Subscription tab with donation and merchandise items

As you can see, in this example we have configured a product named 'Merchandise #001' that is priced at \$100 and a fixed amount donation plan priced at \$10.

Assuming that we select both items (since they were configured as non-exclusive plans check-boxes are presented instead of radio circles) and click on the **BUY / DONATE** button we should see something similar to what is illustrated in **Figure 272**.

Your membership for payment:	
Item	Price
Merchandise #001 for nikos	USD 100.00
Donation Plan for nikos	USD 10.00
Total	USD 110.00




Invoicing address

This is your invoicing address:

First Name: Nicholas
Last Name: Antimisiaris
Company:
Address:
City:
State: -
Zipcode:
Country: -
Phone:

[Click here to modify invoicing address](#)

Please click now on this button to pay:



[Cancel payment and subscription](#)

Figure 272: Offline Payment Presentation

If we select the PAY OFFLINE icon in **Figure 272**, we will see a page that contains the information we configured during the offline payment gateway configuration. This is illustrated in **Figure 273**.

Your membership for payment:	
Item	Price
Merchandise #001 for nikos	USD 100.00
Donation Plan for nikos	USD 10.00
Total	USD 110.00

You can pay us with a check using regular post. Please print out and enclose also the payment slip by clicking on the button below and then selecting print. Please allow 3-10 days for the post and to cash-in the check. Our postal address is as follows:

BestSite
Address
Town

Alternatively, you can wire-transfer us the payment (all bank charges to your cost). Our account:

Account #:
SWIFT:
BIC:

[Click here to confirm that you are paying off-line and to display the Payment slip to print](#)

Figure 273: Offline Payment Page

By clicking on the red framed button/URL shown in **Figure 273** a JavaScript popup will appear to notify us that an offline transaction will be posted. This is illustrated in **Figure 274**.

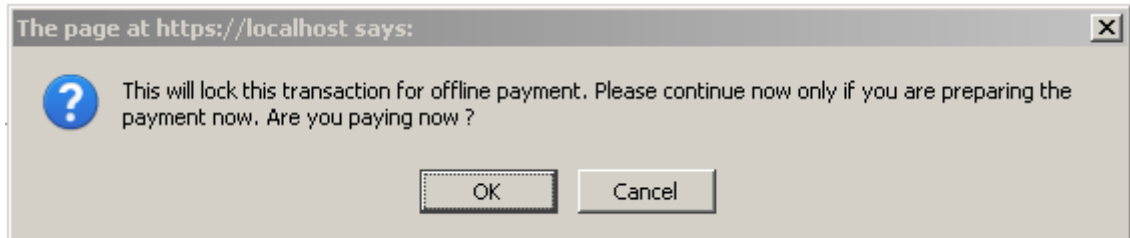


Figure 274: Offline Payment Transaction popup

By selecting OK on the JavaScript popup in **Figure 274** a new popup window appears with the payment slip as illustrated in **Figure 275**.

Payment Slip No. 8
For website: Community Builder Startup
For user: M3-63-1,D8-63-2
https://localhost/cb

Your membership for payment:	
Item	Price
Merchandise #001 for nikos	USD 100.00
Donation Plan for nikos	USD 10.00
Total	USD 110.00

Important: include our reference with your payment: Number 8 / localhost/cb

If you pay by check, please print and enclose this page with your check.

[PRINT](#)
[CLOSE](#)

Thank you for initiating the payment of USD 110.00 for the Merchandise #001, Donation Plan for nikos using an offline payment method . Your offline payment is currently on its way to being processed.

Figure 275: Offline Payment Slip

This payment slip should be printed and included with the actual offline payment. For example if our offline payment options include personnel checks in the post, then our

users should enclose the payment slip information along with their check in the envelope.

This action of clicking OK in the JavaScript popup results in a new pending payment basket created in our **Baskets** icon area (see **Chapter 7.7**). The actual **Baskets** icon should show this as illustrated in **Figure 276** where we see that 2 payments are pending (one of them was created by our last JavaScript popup activity)



Figure 276: Pending Offline Payments in Baskets area

By clicking on the **Baskets** icon in **Figure 276**, we are taken to the Baskets area summary page where we see our pending payments as illustrated in **Figure 277**. You will also see that now, since we have pending payments, the Baskets Summary page also has an extra **Pay icon** and a **Delete icon** in the top right corner next to the **Close icon** that is normally there.

We can record a completed offline payment by selecting the appropriate checkbox in **Figure 277** and clicking on the **Pay icon**.

CB Paid Subscriptions: Baskets

Baskets
A Payment basket is an invoice to the user, which status and content can be seen here.

Payment Baskets
Filter:

Subscriptions
Plan: By plan

Payments
Currency: currency
Gross amount: gross amount
Gateway account: gateway account
Payment using: payment using
Payment type: payment type
Payment status: payment status

Date and time
By date and time of completed payment:
From: / /
Up to: / /
Period: Turnover in last

#	<input type="checkbox"/>	Username	Full name	Currency	Amount: single	first	recurring	Gateway account	Status	Initiated on	Completed on	IP address	Items	Payments	Notifications	Change Logs	Owner	Id
1	<input checked="" type="checkbox"/>	nikos	Nicholas Antimisiaris	USD	100.00	-	-	Off-line Gateway	Pending	04/04/2009 20:42:44		127.0.0.1	Merchandise #001 for nikos	---	4	3	System	7
2	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	USD	110.00	-	-	Off-line Gateway	Completed	04/04/2009 20:08:50	04/04/2009 20:17:37	127.0.0.1	Merchandise #001, Donation Plan for nikos	1	2	4	System	6
3	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	USD	10.00	-	-	Test Gateway	Completed	04/04/2009 20:06:29	04/04/2009 20:08:32	127.0.0.1	Donation Plan for nikos	1	1	2	System	5
4	<input type="checkbox"/>	nikos	Nicholas Antimisiaris	USD	10.00	-	-	Test Gateway	Completed	04/04/2009 20:01:23	04/04/2009 20:03:54	127.0.0.1	Donation Plan for nikos	1	1	2	System	4
5	<input type="checkbox"/>	paulina	Paulina Antimisiaris	USD	10.00	-	-	Test Gateway	Completed	04/04/2009 18:30:04	04/04/2009 18:30:31	127.0.0.1	Donation Plan for paulina	1	1	2	System	3
6	<input type="checkbox"/>	paulina	Paulina Antimisiaris	USD	10.00	-	-	Test Gateway	Completed	04/04/2009 18:12:16	04/04/2009 18:12:45	127.0.0.1	Donation Plan for paulina	1	1	2	System	2
7	<input checked="" type="checkbox"/>	paulina	Paulina Antimisiaris	USD	10.00	-	-	Test Gateway	Completed	04/04/2009 18:09:49	04/04/2009 18:11:28	127.0.0.1	Donation Plan for paulina	1	1	4	System	1

Display # 15 << Start < Prev 1 Next > End >> Results 1 - 7 of total 7

Total payments completed with criterias above
This is the total of payments completed, converted into main currency at current currency exchange rates.
Paid baskets: 6
Amount
Currency of total: USD
Total payment amount received: 160.00




Total payments pending completion with criterias above
This is the total of payments pending completion, converted into main currency at current currency exchange rates.
Pending baskets: 1
Amount
Currency of total: USD
Total payment amount pending: 100.00

Figure 277: Baskets Summary Page with Pending Payments

Once we select the offline payment we want to process by ticking the checkbox, then by clicking on the Pay icon button we will be presented with the **Edit Pay the basket manually** page as illustrated in **Figure 278**.

At this point we should notice that that the item number in the payment basket shown in **Figure 278** matches the number given to the user on the payment slip shown in **Figure 275**.

CB Paid Subscriptions: Edit Pay the basket manually



Pay the basket manually

Payment basket details

Basket Id: 8
Invoice number: U33350677429050
Item number: M3-63-1_D8-63-2

User details

Username: nikos
Full name: Nicholas Antimisiris
User Id: 63

Payment basket Content

Your membership for payment:

Item	Price
Merchandise #001 for nikos	USD 100.00
Donation Plan for nikos	USD 10.00
Total	USD 110.00

Basket:

Quantity: 1
Item name: Merchandise #001, Donation Plan for nikos
Time initiated: 04/04/2009 22:06:39
Currency: USD
Amount: 110.00000

Payment details of payment to register

Payment date:

Currency:

US Dollar






Amount:

110.00000

Payment type:

Bank transfer

Transaction id (optional):



CB paid subscriptions plugin is commercial software released to customers only under its [commercial license](#).

Figure 278: Edit Pay the basket manually page

In the **Edit Pay the basket manually** page we can now record the received offline payment by filling in the following information:

- **Payment date:**
To be completed by selecting day, month and year values from three drop-down fields.
- **Currency:**
To be completed by selecting the appropriate currency from a drop-down field.
- **Amount:**
To be completed by filling in the value in the text field box.

- **Payment type:**

To be completed by selecting the appropriate type from the drop-down field.

Available options include:

- Bank transfer
- Post transfer
- Cash
- Phone payment
- Fax payment
- Credit note
- Coupon
- Gift
- Online by other means

- **Transaction id (optional):**

To be optionally completed with a transaction id relevant to the payment method used.

Note: Even though you can record different currency and amount for an offline payment, the actual basket will be considered closed and the products will be considered paid-in-full. Recording different amounts is just meant for accounting purposes at the moment.

13.1 Frontend Ordering and Payment Recording

As of **CBSubs™ 1.3** all superadmin users and authorized users (see **Chapter 7.3.6** on Permissions) can make an order on behalf of a user from the frontend by simply visiting a user's profile and making the appropriate choice from the Subscriptions tab.

If an off-line payment method is enabled, the authorized user can also complete the payment recording in the same frontend process.

This feature is very convenient for membership clubs that tend to receive many off-line payments for membership subscriptions. This way authorized users can record the subscription ordering and payment without any further involvement from end-user.

14 General Use Cases

As you can see there are many parameters that when combined properly will enable the implementation of many different payment subscription scenarios. In order to somewhat explore these possibilities we will present a series of use cases that will hopefully trigger your imagination and possibly even provide you with a “close to your need” example.

The use cases that will be presented can be summarized as follows:

- GUC1** **Download club:** This use case covers the situation of building a website that contains downloadable items that members have to pay a fee to be able to access for a certain period of time. We will be using the Remository component to handle our download protection and the *Error! Reference source not found.* integration plugin.
- GUC2** **Donation site:** This use case involves setting up a website that accepts donations.
- GUC3** **Community club:** This use case tries to replicate activities encountered in real life clubs. Usually, the membership fee is calendar yearly (means that the fee is based on a physical year and is applicable in full) and paid members get certain privileges (voting, access to facilities, cheaper fees with affiliates, etc). Also, there can be special lists that contain paid members (role call) and a list of expired members.
- GUC4** **Content club:** This use case will cover situations where specific content in the form of Joomla CMS content articles are accessible for a fee based on a periodic membership. This case will demonstrate the CB Paid Subscription built in ACL functionality. Content teasers are built-in where non-paid members can see the article titles and a brief intro, but cannot read more.

- GUC5** **Joomlapolis case:** This use case represents the environment used on our Joomlapolis website where we offer 2 member types: Free membership and also CB Documentation Subscribers. CB Documentation subscribers are given access to a special download area that contains the detailed CB documentation PDF file and also bonus documents and other special CB Team released plugins (e.g., Captcha plugin and release candidate pre-releases. CB Documentation subscribers are also acknowledged as such in their CB user profile. Joomlapolis also offers the MyCommunity template system for purchased download and licensing. Finally, all members are able to make donations as often as they desire.
- GUC6** **Account Expiration case:** This use case describes the situation where we have a FREE limited time plan that expires after a given period. Once this membership plan expires users that were subscribed to it must either renew the FREE plan for another period or must select an alternative paid plan offered by the website. Users subscribed to expired plans have access only to subscribe to another plan (FREE or paid) – no other access is allowed. This scenario is meant to indirectly give the opportunity to FREE members to reconsider their membership options. This use case is not further analyzed but it should be easy to implement based on the reader's understanding of the contents of this guide.

Feel free to visit the special **CBSubs™** use cases forum area and share your specific scenarios with the rest of the **CBSubs™** community.

14.1 GUC1 Download Club

The first use case we will be exploring is a simple download club. The idea is to create a download area that only subscribed members can download from. To better illustrate the use case, we will have three download areas: one for guests/public downloads, one for registered member downloads (this public cannot download from here) and one for subscribed members only (means that even registered members cannot download). We will be preparing a single 'subscription' plan that grants access for 1 month charging 10 USD.

We will configure this scenario using the following ingredients:

- **Joomla 1.5.10 CMS**
- **CB 1.8+** (prerequisite, remember?)
- **CBSubs™ 4.1** Core plugin (see **Chapter 6.3**)
- **Remository** component version 3472J or better (we could just as easily use **DOCman**)
- *Error! Reference source not found.* plugin (see **Chapter** *Error! Reference source not found.* and **Chapter 7.5.6.2**)

14.1.1 GUC1 Remository Configuration

First step is to configure our Remository component to create a new Remository Group called '**Download Club Group**'. You do this from the Remository component Group Manager page as illustrated in **Figure 279**.

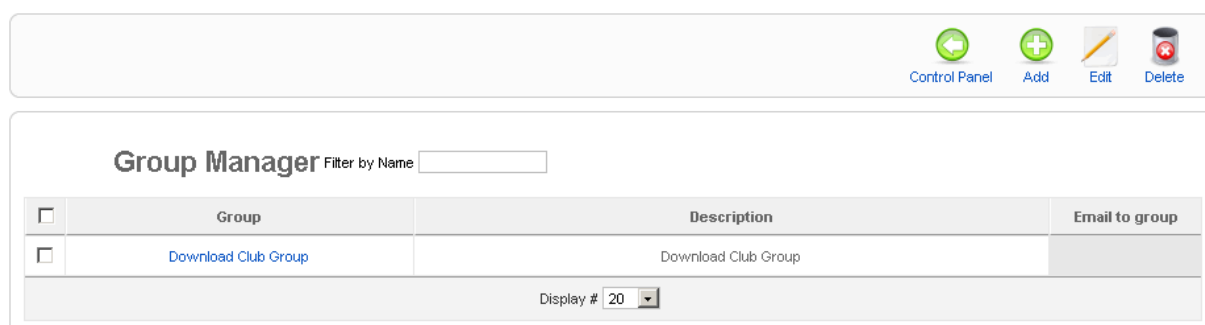









Figure 279: GUC1 Remository Group Manager

Next step is to configure our Remository component to create 3 'containers' (term used by Remository to denote download area or category):

- Free Downloads for Guests
- Free Downloads for Registered Members
- Download Club

These three 'containers' are shown in **Figure 280**. We have even place one file in each container as shown by the -1- in the **Records** column.








 Control Panel
  Publish
  Unpublish
  Add
  Edit
  Delete



Remository Containers


Search: Show descendants: ☐

No parent - top level ** ▼

<input type="checkbox"/>	Name	Visit	Edit	ID	Parent Category	Parent Folder	Published	Records	Visitors	Registered Users	Other Users	Storage Status
<input type="checkbox"/>	Download Club		Edit	2	*	-		1	-/-	-/-		Database
<input type="checkbox"/>	Free Downloads for Guests		Edit	4	*	-		1			-/-	Database
<input type="checkbox"/>	Free Downloads for Registered Members		Edit	3	*	-		1	-/-		-/-	Database

Display # 20

Figure 280: GUC1 Remository Containers

We should also notice that the Download Club container in the figure has a  download icon in the **Other Users** column. This is configured in the Remository Edit Container page illustrated in **Figure 281**.

Remository Edit Container (ID=2)

Suggest Location:
No parent - top level

Folder Name:
Download Club

Alias:
Download Club

Description:
Max: 300 Chars
This area contains packages that are only available for paid subscription members in the Download Club plan.
Please visit your subscription tab in your profile to subscribe to Download Club plan.

Icon:
folder_green.gif

Publishing
Published: ☒

Metadata
Keywords:
Window Title:

Storage
Absolute path (optional):
Files are suitable for storage as plain text? ☐

Access Control
Download Roles
Download Club Group
Registered
Visitor
Nobody
None of these
Add new role:
Upload Roles
Download Club Group
Registered
Visitor
Nobody
None of these
Add new role:
Edit Roles
Download Club Group
Registered
Visitor
Nobody
None of these
Add new role:

Descendant containers to inherit? ☐ Yes ☒ No

Figure 281: GUC1 Remository Download Club Container

In this figure we see that we have selected (red frame) that the Download Club Group be the applicable item in the **Download Roles**.

At the same time we do not allow any front-end uploading or editing for the Download Club container (see **Upload Roles** and **Edit Roles** in **Figure 281**).

Now assuming that we have created a Joomla menu item pointing to the Remository component (standard practice when installing any Joomla component) we would see something similar to the page illustrated in **Figure 282**.




Containers	Folders/Files
 <u>Download Club</u>	(0/1)
<p>This area contains packages that are only available for paid subscription members in the Download Club plan.</p> <p>Please visit your subscription tab in your profile to subscribe to Download Club plan.</p>	
 <u>Free Downloads for Guests</u>	(0/1)
<p>This area contains free downloads for guests!</p>	
 <u>Free Downloads for Registered Members</u>	(0/1)
<p>This area contains free download packages for all registered members!</p>	

Figure 282: GUC1 Remository Containers front-end view

The three containers we created and published in **Figure 280** are shown along with the fact that we have one (1) download package placed in each container.

If we try to download the item in the Download Club container we should see the notice illustrated in **Figure 283**.

Download Club Package #1

**This location is for Group Members Only.
Please refer to administrator about groups that can access
Download Club**

Description:	This download package is only available for Download Club Members!	
Submitted By:	Site Administrator (admin)	
Submitted On:	06 Apr 2009	
File Size:	899.65 Kb	
Downloads:	1	
Rating:	☆☆☆☆☆	Total Votes:0
	<input data-bbox="614 1713 694 1758" type="button" value="?"/> <input data-bbox="702 1713 782 1758" type="button" value="RATE"/>	
Be the first to comment on this file!		
Your Comment:	<input data-bbox="614 1803 1037 1904" type="text"/>	
<i>Max: 150 Chars</i>	<input data-bbox="1045 1870 1236 1915" type="button" value="LEAVE COMMENT"/>	

Figure 283: GUC1 Remository Download blocking message

At this point let's sit back and ponder on what we have done and what remains to be configured. We have configured our Remository component to protect a specific download area by specifying that only users in the Remository Download Club Group be permitted to download. At this moment the only user in the Remository Download Club Group is the 'admin' user as illustrated in **Figure 284**.

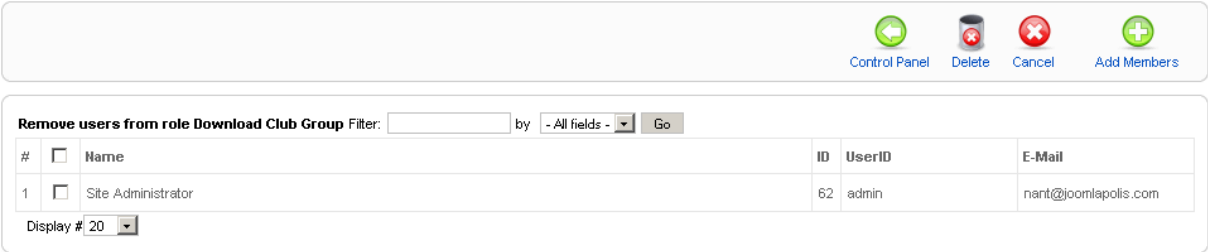


Figure 284: GUC1 Remository Download Club Group initial membership

14.1.2 GUC1 Download Club Plan Configuration

Now we need to configure a **CBSubs™** Subscription plan that has the following characteristics:

- Plan is of type Subscription
- Name of plan is **Download Club**
- Cost of plan is **10 USD**
- Duration of plan is 1 month
- No plan grace period
- No renewals in advance (plan has to expire first)
- Unlimited reoccurrences of future plan subscriptions
- Membership in this plan should add member to Remository Download Club Group upon subscription activation and remove user from this group when subscription expires or is terminated (by user voluntarily un-subscribing or backend administrator action)

In **Figure 285** we see the summary line for the download club plan as would be shown in the **Plan** icon summary area.

4	<input type="checkbox"/>	Download Club	DL-Club		USD 10.00	1 month	unlimited	-	No initial validity		4					Public Frontend	
---	--------------------------	---------------	---------	--	-----------	---------	-----------	---	---------------------	--	---	--	--	--	--	-----------------	--

Figure 285: GUC1 Download Club Plan summary view

In **Figure 285**, we see what the Pricing tab of our Download Club plan would look like. Notice the ‘**Regular Price of plan**’, the ‘**Regular Validity duration**’ and the ‘**Renewable in advanced by**’ parameter values.

The screenshot shows the 'Pricing' tab of the 'GUC1 Download Club Plan' configuration. The interface includes tabs for 'Presentation', 'Pricing', 'Workflows', 'Access', and 'Integrations'. The 'Pricing' tab is active, showing 'Plan settings: Pricing and validity:'. The 'Currency' is set to 'Same as global configuration'. Under 'Pricing and validity', there is a section 'Regular Plan pricing and validity' with fields for 'Regular Price of plan' (10.00000), 'Regular Validity duration' (1 month), and 'Total number of occurrences of regular validity/price (0=unlimited):' (0). Below this, 'Prorate remaining value of this plan when upgrading:' is set to 'No', 'Renewable in advance by:' is set to 'Only after expiration', and 'Grace period before real expiration:' is set to 'none'. A section 'Auto-renewals with auto-recurring payments' explains that some payment processors allow for automatic recurring payments (ARB) or automated subscriptions payments, and offers the option 'No: single payments at a time'. The 'Payment invoice item text' section provides instructions on how to substitute text using various strings like [PREFIX_TEXT], [PLANS_TITLE], [ITEM_NAME], [VALIDITY_IF_NOT_AUTORECURRING], [EXPIRY], [EXPIRING_IF_NOT_AUTORECURRING], [PLANS_TITLE], [SITENAME], [SITEURL], [USERNAME], [NAME], [EMAIL], and any [cb_fieldname]. It shows the 'Payment item text' and 'Payment processor item text (short)' fields with their respective substitutions. Finally, the 'Owner id (only supported: 0 for now):' is set to 0.

Presentation Pricing Workflows Access Integrations

Plan settings: Pricing and validity:

Currency: Same as global configuration

Pricing and validity

Is the first amount and period different: Always same period and price

Regular Plan pricing and validity

Regular Price of plan: 10.00000

Regular Validity duration: 1 month

Total number of occurrences of regular validity/price (0=unlimited): 0

Prorate remaining value of this plan when upgrading: No

Renewable in advance by: Only after expiration

Grace period before real expiration: none

Auto-renewals with auto-recurring payments

Some payment processors allow for automatic recurring payments (ARB) or automated subscriptions payments. If your payment processor supports this feature and it is implemented and enabled in the payment gateway settings, you can select following options:

Auto-recurring renewals (*): No: single payments at a time

Payment invoice item text

Settings for item text when presenting the invoice to the user, as well as the description text sent to the payment processor: You can substitute text using following strings: [PREFIX_TEXT] (depending on payment: can be empty for new subscriptions, or Renew, Upgrade), [ITEM_NAME], [ITEM_ALIAS], [ITEM_DESCRIPTION], [VALIDITY] (displays duration of plan, not recommended as it displays also for auto-recurring plans), [VALIDITY_IF_NOT_AUTORECURRING], [EXPIRY] (not recommended as it displays also for auto-recurring plans, displays expiry date/time (if configured), [EXPIRING_IF_NOT_AUTORECURRING] (displays expiring on date +time if configured to display time, formatted by CB date format), [PLANS_TITLE], [SITENAME], [SITEURL], [USERNAME], [NAME], [EMAIL] and any [cb_fieldname].


Payment item text: [PREFIX_TEXT] [PLANS_TITLE] [ITEM_NAME] [VALIDITY_IF_NOT_AUTORECURRING]





Payment processor item text (short): [PREFIX_TEXT] [ITEM_ALIAS] [VALIDITY_IF_NOT_AUTORECURRING]

Owner id (only supported: 0 for now): 0

Figure 286: GUC1 Download Club Plan Pricing tab configuration

Figure 287 depicts what the Remository integration sub-tab would look like for our Download Club plan. Notice that we have selected the Remository Club Group we created earlier on in our Remository component.


CB Paid Subscriptions: Edit Subscription Plan

Subscription Plan
 A Subscription Plan includes the settings for that plan, which can be set here.
 Item_type:
 Type of product: User Subscription Plan
 Subscriptions with this plan: 2
 Active subscriptions with this plan: 1
 Expired subscriptions with this plan: 0
 Subscriptions with this plan that have been upgraded to another plan: 0
 Url of plan to display only this plan (';' to display multiple plans): index.php?option=com_comprofiler&task=pluginclass&plugin=cbpaysubscriptions&do=displayplans&plans=4
 Warning: Changing a plan with existing subscriptions will change these subscriptions, except for the current expiry date of active ones. If you need to make changes, it's better to create a new plan, and not allow new subscriptions to the old plan.

Presentation Pricing Workflows Access **Integrations**

Integrations settings (if integrating plugins are loaded):
 Following CBSubs integration CB plugins are installed but not published:

VirtueMart Remository PostAfPro jAwards iDevAff GoogleAnalytic Email Docman CB Fields Content Extensions SQL actions

Folder Access Plan Image

Remository groups of user changing on plan activation and deactivation:
 Subscription groups:

... Select (CTR/CMD-click: multiple) ...
 Download Club Group
 Nobody
 Registered

 Remove groups on plan deactivation: Yes

Figure 287: GUC1 CBSubs™ Remository Integration Configuration

The key plan parameter settings for our Download Club plan are summarized in a table format in **Figure 292** at the end of this section. Once we have finished with all plan parameters and have enabled the plan we should notice its presence in our website.

We will see that from now on, the Download Club Subscription plan will appear on our registration form as illustrated in **Figure 288**.

Registration

🔴 Required field | 🟢 Field visible on your profile | 🔴 Field **not** visible on profile | ⓘ Information: Point mouse to icon

Subscription Plan:

☐

Download Club

Our Download Club subscription will give you access to download area for club members!

1 month for USD 10.00.

First Name:



Last Name:



Email:



Username:



Password:



Verify Password:



Security Code:



Enter Security Code:



REGISTER

🔴 Required field | 🟢 Field visible on your profile | 🔴 Field **not** visible on profile | ⓘ Information: Point mouse to icon

Figure 288: GUC1 Download Club Registration Form

We should also see that our existing membership will see the Download Club as a valid upgrade option in their CB Profile Subscription tab as illustrated in **Figure 289**.

Subscription

Your Subscriptions

Your current subscription upgrade possibility:

☐ **Download Club**

Our Download Club subscription will give you access to download area for club members!

1 month for USD 10.00.

UPGRADE

Figure 289: GUC1 Front-end Subscription Profile tab of a registered user

Also in **Figure 290** we see a situation where a user has an expired subscription and is able to select the **RESUBSCRIBE: 1 MONTH FOR USD 10.00** button that is presented in his/her profile subscription tab.

Subscription

Your Subscriptions

Your current subscription:

Download Club

Our Download Club subscription will give you access to download area for club members!

1 month Unsubscribed on 07/04/2009

RESUBSCRIBE: 1 MONTH FOR USD 10.00.

Your invoices of last 6 months

[Click here to view the list of invoices](#)

Figure 290: GUC1 Front-end Subscription Profile tab with RESUBSCRIBE possibility

Finally, just to check if our Remository integration works properly, we should notice that all active Download Club subscribed members will appear as members of the Download Club Group we created in our Remository component early in the chapter. This is illustrated in **Figure 291**.

Control Panel
Delete
Cancel
Add Members

Remove users from role Download Club Group Filter: by - All fields - Go

#	<input type="checkbox"/>	Name	ID	UserID	E-Mail
1	<input type="checkbox"/>	Site Administrator	62	admin	nant@joomlapolis.com
2	<input type="checkbox"/>	Paulina Antimisiaris	65	paulina	paulina@antimisiaris.com

Display # 20

Figure 291: GUC1 Remository Download Club Group members after new subscription

GUC1: Download Club Plan (product-type: user subscription)		
Presentation tab		
Presentation	Name of plan:	Download Club
	Alias of plan:	DL-Club
	Description of plan:	Our Download Club subscription will give you access to download area for club members!
	Price display of plan:	[AUTOMATIC]
Pricing tab		
Pricing	Currency:	Same as global configuration
	Is the first amount and period different:	Always same period and price
	Regular price of plan:	10
	Regular validity duration:	1 month
	Total number of occurrences of regular validity/price:	0 (unlimited)
	Prorate remaining value of this plan when upgrading:	No
	Renewable in advance by:	Only after expiration
	Grace period before real expiration:	None
Workflows		
Workflows	Selected by default:	No
	Allow registration:	Yes
	Propose spontaneously plan at registration:	Yes, show automatically plan for normal registrations (recommended)
	User Email Confirmation:	Default (CB settings)
	User Approval by Moderator:	Default (CB settings)
	Allow upgrades to this:	Yes
	Propose spontaneously plan for upgrades	Yes, show automatically plan for normal upgrades (recommended)
	Multiple subscriptions per user	Only one at a time

Figure 292: Key Plan Parameters for GUC1

14.2 GUC2: Donation Site

This use case will be exploring is a donations site. The idea is to create a donation plans that accept donations. To make things even more interesting, let's add a read-only CB field of type text to the CB profile and when a user donates we can have this field show 'I believe in donating and I have!'.

We will configure this scenario using the following ingredients:

- **Joomla 1.5.20 CMS**
- **CB 1.3+** (prerequisite, remember?)
- **CBSubs™ 4.1** Core plugin (see **Chapter 6.3**)
- **CBSubs CB Field** plugin (see **Chapter 6.4** and **Chapter 7.5.6.6**)

In **Figure 293** we see the summary row of the donation plan we have created for this use case.

6	<input type="checkbox"/>	Donation Plan (UC2)	DPUC2	✗	-	-	unlimited	-	-	▲	6		✓	✓	✓	✓	Public Frontend	✗
---	--------------------------	---------------------	-------	---	---	---	-----------	---	---	---	---	--	---	---	---	---	-----------------	---

Figure 293: GUC1 Donation Plan summary view

In **Figure 294** we see the Pricing tab of the Donation Plan we have created for this use case. As illustrated, we have specified that **CBSubs™** should suggest a list of donation amounts (5, 10, 20, 30, and 50) and also permit a free (open) amount field. This open amount field is also illustrated in **Figure 297** where we see the relevant registration form.

Presentation Pricing Workflows Access Integrations

Plan settings: Pricing and validity:

Currency: Same as global configuration

Donation amount selection

Are donation amounts given?: List of suggested amounts and a free amount field

List of suggested amounts

Suggested amounts (separated by comma ,): 5,10,20,30,50

Default (suggested) amount: 5

Minimum donation amount: 2

Maximum donation amount:

Prorate value of donation when upgrading: No

autorecurring:

Payment invoice item text

Settings for item text when presenting the invoice to the user, as well as the description text sent to the payment processor: You can substitute text using following strings: [PREFIX_TEXT] (depending on payment: can be empty for new subscriptions, or Renew, Upgrade), [ITEM_NAME], [ITEM_ALIAS], [ITEM_DESCRIPTION], [PLANS_TITLE], [SITEURL], [USERNAME], [NAME], [EMAIL] and any [cb_fieldname].

Payment item text: [PREFIX_TEXT] [ITEM_NAME] for [USERNAME]

Payment processor item text (short): [PREFIX_TEXT] [ITEM_ALIAS]

Owner id (only supported: 0 for now): 0

Figure 294: GUC2 Donation Plan Pricing tab configuration

In **Figure 295** we see how the **CBSubs CB Field** integration sub-tab is used to assign the donation message to the read-only CB field titled 'Donation Status'. This message is automatically assigned to the read-only field when a donation is completed as illustrated in **Figure 299** as opposed to those that have never donated as illustrated in **Figure 298**.

Subscription Plan

A Subscription Plan includes the settings for that plan, which can be set here.

Type of product: Donation

Donation records with this plan: 1

Completed donations with this plan: 1

Warning: Changing a donation plan with existing donations will change these donations-descriptions too. If you need to make changes, it's better to create a new plan, and not allow new donations with the old plan.

Presentation Pricing Workflows Access Integrations

Integrations settings (if integrating plugins are loaded):

Following CBSubs integration CB plugins are installed but not published:

VirtueMart Remository PostAfPro jAwards iDevAff GoogleAnalytic Email Docman CB Fields Content Extensions SQL actions

Folder Access Plan Image

CB fields changing on plan activation and deactivation:

Field 1

Field: Donation Status

Value: I believe in donating and I have!

Remove value on plan deactivation: No

Operator: Set: Field = Value

Field 2

Field: ... Select Field ...

Figure 295: GUC2 Donation Plan CB Fields Integration sub-tab

Our registration form will now show our donation plan as illustrated in **Figure 296**. We could have chosen not to show this donation plan during the registration process and instead just have it appear in the user profile subscription tab illustrated in **Figure 300**.

Registration

🔴 Required field | 🟢 Field visible on your profile | 🚫 Field **not** visible on profile | ⓘ Information: Point mouse to icon

Subscription Plan: ☐ **Donation Plan (UC2)**

Please consider donating any amount. You can donate as many times as you want.
All donors will get a profile image!

USD 5.00 

First Name: 🔴 🟢 ⓘ

Last Name: 🔴 🟢 ⓘ

Email: 🔴 🟢 ⓘ

Username: 🔴 🟢 ⓘ

Password: 🔴 🟢 ⓘ

Verify Password: 🔴 🟢 ⓘ

Security Code: 

Enter Security Code: 🔴 🟢 ⓘ

REGISTER

🔴 Required field | 🟢 Field visible on your profile | 🚫 Field **not** visible on profile | ⓘ Information: Point mouse to icon

Figure 296: GUC2 Donation Plan registration form

In **Figure 296** we see that our registration form includes the donation plan and the suggested amount of **USD 5.00** as specified in the Pricing tab shown in **Figure 294**. The drop-down field shown in the registration form will contain the values specified (5, 10, 20, 30, and 50).

One of the drop-down selection values is **‘Other...’** and when this is selected another field box will automatically appear and allow the applicant to fill in any alternative amount. This is illustrated in **Figure 297**.

Registration

🔴 Required field | 🟢 Field visible on your profile | 🚫 Field **not** visible on profile | ⓘ Information: Point mouse to icon

Subscription Plan:



Donation Plan (UC2)

Please consider donating any amount. You can donate as many times as you want.
All donors will get a profile image!

Other...



USD

First Name:



Last Name:



Figure 297: GUC2 Donation Plan registration form open donation value

If a user did not donate during the registration process, his/her CB user profile will have a user status section like the one illustrated in **Figure 298**. In this figure we see that the read-only 'Donation Status' CB field is empty (thus the '-' symbol).

Hits:	6
Online Status:	🟢 ONLINE
Member Since:	27 days ago
Last Online:	7 hours ago
Last Updated:	21 days ago
Connections:	2
Rating:	☆☆☆☆☆
Donation Status:	-

Figure 298: GUC2 CB Field on User Profiles that have not donated

However, once a user donates once his/her user profile will change and display an updated '**Donation Status**' CB field like the one illustrated in **Figure 299**.



Hits:	6
Online Status:	 ONLINE
Member Since:	27 days ago
Last Online:	7 hours ago
Last Updated:	21 days ago
Connections:	2
Rating:	
Donation Status:	I believe in donating and I have!

Figure 299: GUC2 CB field on Profiles of users that have donated

Every subscription tab on all user profiles (whether users have donated or not in the past) will have the Donation Plan check box as illustrated in **Figure 300**.

Subscription

Your Subscriptions

Your current subscription upgrade possibility:

☐ **Donation Plan (UC2)**

Please consider donating any amount. You can donate as many times as you want.
All donors will get a profile image!

USD 5.00

DONATE


Figure 300: GUC2 User Profile Subscriptions tab

The table illustrated in **Figure 301** provides a summary of key plan parameter settings for the Donation Plan of use case 2.

GUC2: Donation Plan (product-type: donation)		
Presentation tab		
Presentation	Name of plan:	Donation Plan (UC2)
	Alias of plan:	DPUC2
	Description of plan:	Please consider donating any amount. Donate as many times as you want. All donors will get a nice thank you message on their user profiles.
	Price display of plan:	[AUTOMATIC]
Pricing tab		
Pricing	Currency:	Same as global configuration
	Are donation amounts given ?:	List of suggested amounts and a free amount field
	Suggested amounts:	5,10,20,30,50
	Default (suggested) amount:	5
	Minimum donation amount:	2
	Maximum donation amount:	Empty
	Prorate remaining value of this plan when upgrading:	No
Workflows		
Workflows	Selected by default:	No
	Allow registration:	Yes
	Propose spontaneously plan at registration:	Yes, show automatically plan for normal registrations (recommended)
	User Email Confirmation:	Default (CB settings)
	User Approval by Moderator:	Default (CB settings)
	Allow upgrades to this:	Yes
	Propose spontaneously plan for upgrades	Yes, show automatically plan for normal upgrades (recommended)

Figure 301: GUC2 Donation Plan Key Parameters

14.3 GUC3 Society Club

This use case will demonstrate how **CBSubs™** could be used to support society related websites like churches and clubs and the paid subscription needs such organizations have. Most real-life clubs have yearly dues that are normally paid up-front. In any case even if a user has neglected to pay his/her dues no discount is given. So if someone pays in the middle of the year he/she must still pay the full year amount. These clubs need to maintain a paid-dues members list. All members on such a list maintain their privileges (e.g., allowed to vote, etc.). We will also give each 'good standing' member a  profile image.

We will configure this scenario using the following ingredients:

- **Joomla 1.5.20 CMS**
- **CB 1.3+** (prerequisite, remember?)
- **CBSubs™ 4.1** Core plugin (see **Chapter 6.3**)
- **CBSubs CB Field** plugin (see **Chapter 6.4** and **Chapter 7.5.6.6**)
- **CBSubs Plans Image** plugin (see **Chapter 6.12** and **Chapter 7.5.6.11**)






<input type="checkbox"/>	Society Club	SClub		USD 40.00	This calendar year	unlimited	-	No initial validity			5					Public Frontend	
--------------------------	--------------	-------	---	-----------	--------------------	-----------	---	---------------------	---	---	---	---	---	---	---	-----------------	---

Figure 302: GUC3 Society Plan summary view

Presentation	Pricing	Workflows	Access	Integrations
Plan settings: Pricing and validity:				
Currency: Same as global configuration				
Pricing and validity				
Is the first amount and period different: Always same period and price				
Regular Plan pricing and validity				
Regular Price of plan:		40.00000		
Regular Validity duration:		This calendar year		
Total number of occurrences of regular validity/price (0=unlimited):		0		
Prorate remaining value of this plan when upgrading:		No		
Bonus time before expiry (for calendar-based durations):		No bonus		
Renewable in advance by:		1 year		
Grace period before real expiration:		none		

Figure 303: GUC3 Society Dues Plan Pricing tab configuration

Figure 304: GUC3 Society Dues Plan CB Fields Integration sub-tab

Figure 305: GUC3 Society Dues Plan Image Integration sub-tab

Figure 306: GUC3 CB Plan Image field




Hits:	0
Online Status:	 ONLINE
Member Since:	70 minutes ago
Last Online:	4 hours ago
Last Updated:	-
Connections:	0
Rating:	
Donation Status:	-
Good standing:	Yes
plan image:	

Figure 307: GUC3 Good Standing field and Plan image field

GUC3: Society Club Plan (product-type: user subscription)		
Presentation tab		
Presentation	Name of plan:	Society Club
	Alias of plan:	Sclub
	Description of plan:	This is the Society Club dues plan. This is a physical year subscription.
	Price display of plan:	[AUTOMATIC]
Pricing tab		
Pricing	Currency:	Same as global configuration
	Is the first amount and period different:	Always same period and price
	Regular price of plan:	40
	Regular validity duration:	This calendar year
	Total number of occurrences of regular validity/price:	0 (unlimited)
	Prorate remaining value of this plan when upgrading:	No
	Renewable in advance by:	Only after expiration
	Grace period before real expiration:	None
	Auto-recurring renewals:	No, single payment at a time
Workflows		
Workflows	Selected by default:	No
	Allow registration:	Yes
	Propose spontaneously plan at registration:	Yes, show automatically plan for normal registrations (recommended)
	User Email Confirmation:	Default (CB settings)
	User Approval by Moderator:	Default (CB settings)
	Allow upgrades to this:	Yes
	Propose spontaneously plan for upgrades	Yes, show automatically plan for normal upgrades (recommended)
	Multiple subscriptions per user	Only one at a time

Figure 308: GUC3 Society Dues Plan Key Parameters

14.4 GUC4 Content Subscription Plan

This use case will demonstrate how **CBSubs™** could be used to offer paid subscription content services. Content could be anything your CMS (Joomla or Mambo) considers as content and even other services offered with the installation of extra CMS extensions (components, modules, etc).

Let's consider the following business scenario. We have a Joomla website that has content articles organized in sections and categories. These articles may have training material embedded in them and even video material. We want to restrict these content items to only those members who pay a subscription fee. Our intention is to offer this content for 35 USD per month.

We will configure this scenario using the following ingredients:

- **Joomla 1.5.20 CMS**
- **CB 1.3+** (prerequisite, remember?)
- **CBSubs™ 4.1** Core plugin (see **Chapter 6.3**)
- **CBSubs Content** plugin (see **Chapter 6.15** and **Chapter 7.5.6.3**)

For this use case we will be working off a default Joomla 1.5.10 website (with initial content) and then we will create a **CBSubs™** user subscription plan that protects the following content elements:

- About Joomla/The CMS/ *What's New in 1.5?* article (see **Figure 310**)
- About Joomla/The Community/*The Joomla! Community* article (see **Figure 310**)
- topmenu/*CB Lists* menu item (see **Figure 311**)
- *News feeds* component (see **Figure 312**)
- *Polls* (right) module (see **Figure 313**)

These content elements are highlighted in red in **Figure 309**. Once our Content Access plan has been properly configured we will see that **CBSubs™** will protect these highlighted elements.

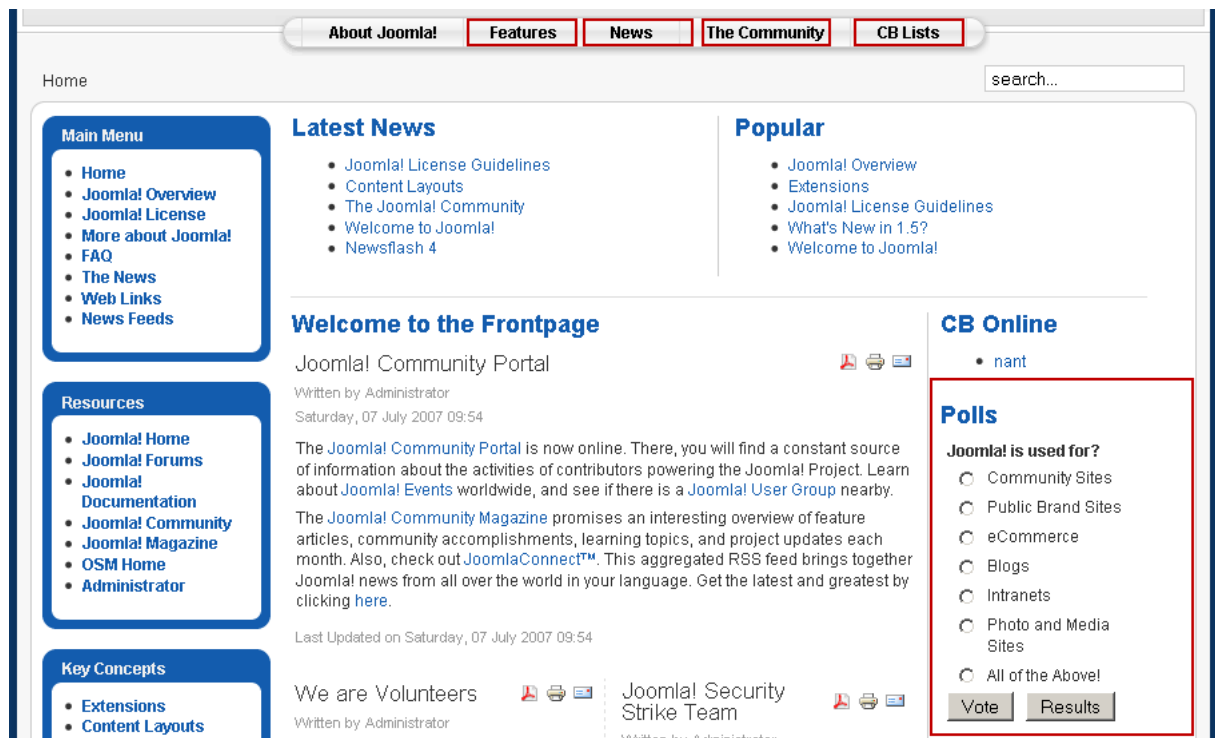


Figure 309: GUC4 Protecting Joomla Content Home Page

The highlighted **Features** menu link in Figure 309 would take us to the '*What's New in Joomla 1.5?*' article. The **News** item would take us to the News Feed component area. Similarly **The Community** item would take us to the '*The Joomla! Community*' article and the **CB Lists** item would take us to the Community Builder user lists component area.

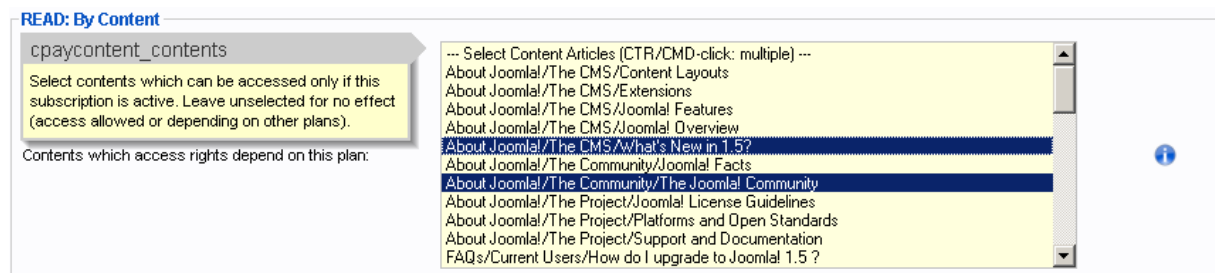


Figure 310: GUC4 Protecting Content Articles

In **Figure 310** we have selected two specific articles to be protected by the **CBSubs™** plan we are configuring. Multiple items are selected using the **Ctrl** key on a **WINDOWS** keyboard or the **Cmd** key on a **Mac** machine.

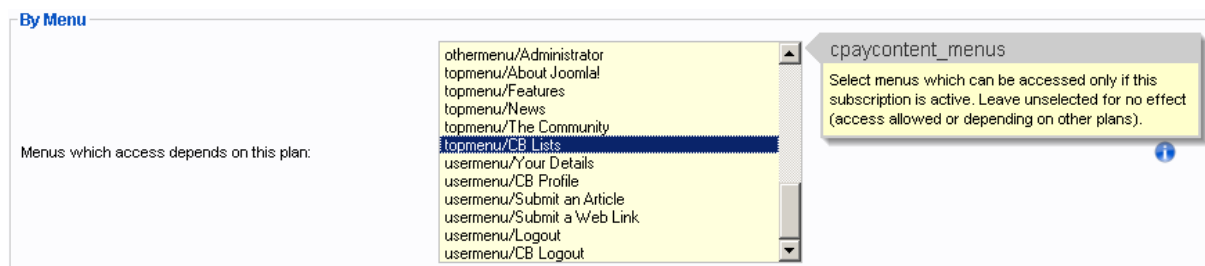


Figure 311: GUC4 Protecting CMS Menu items

In **Figure 311** we have protected the CB Lists menu item. This means that all members who are not plan subscribers will not be able to see and use the CB Lists menu item contents. Thus they will not be able to see any CB User Lists we have created. Instead they will be presented with a message informing them of this protected content and also proposing which plan(s) they need to subscribe to in order to gain access.

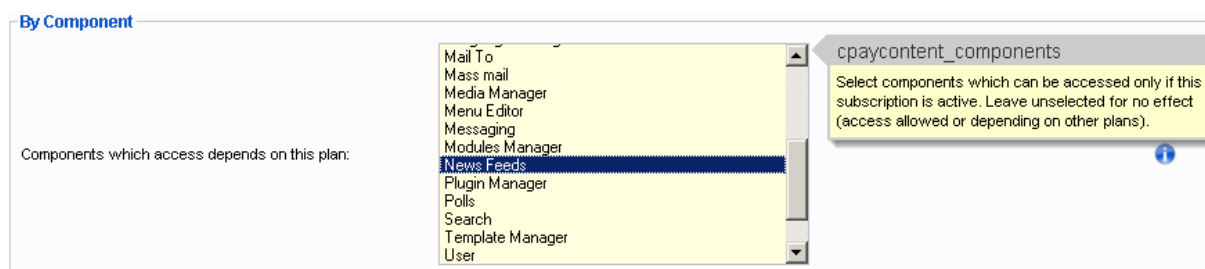


Figure 312: GUC4 Protecting CMS Components

In **Figure 312** we have protected the News Feeds Joomla component that is accessed via the **News** menu item highlighted in **Figure 309**. This means that if a member not subscribed to this plan we are configuring attempts to click on this menu item they should be blocked from accessing this content. This is the case as we will see in **Figure 314** and **Figure 315** where we see that **CBSubs™** not only blocks content viewing but also proposes which subscription plan would permit access to this content.

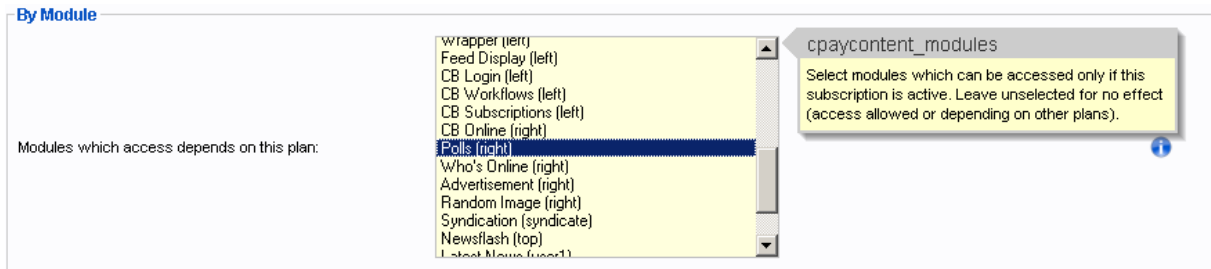


Figure 313: GUC4 Protecting CMS Modules

In **Figure 313** we have configured the **By Module** frame of the Extension sub-tab Integration tab in our plan to not show the Polls module for non subscribed members.

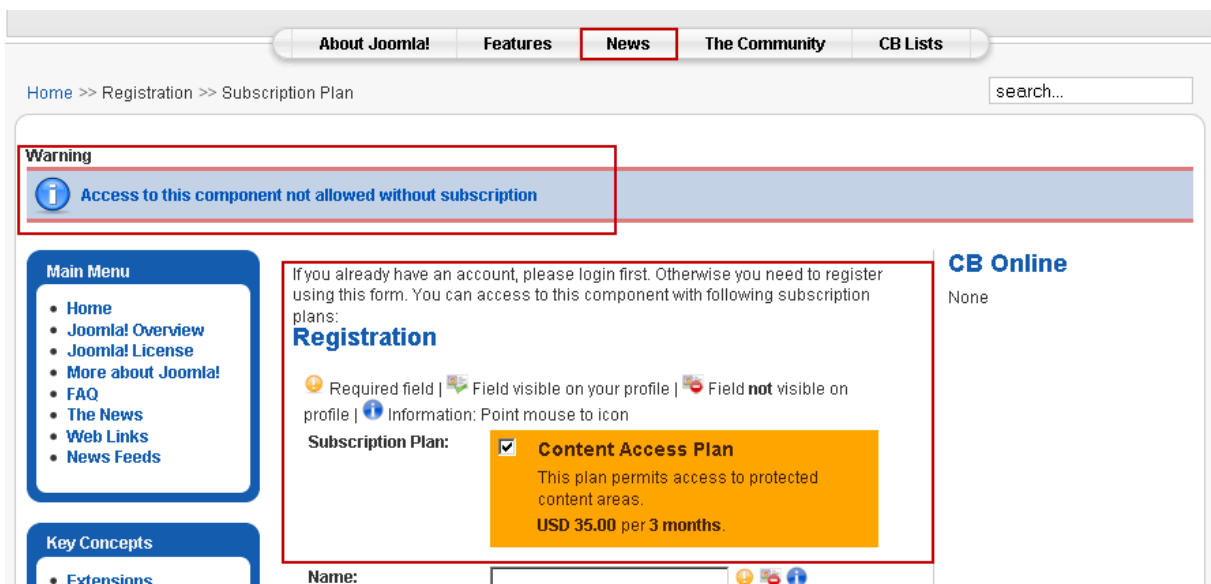


Figure 314: GUC4 CBSubs™ blocking and proposing registration form

In **Figure 314** we see all of this in action. If a public (non registered) viewer clicks on the **News** menu item in this figure a Warning message is displayed stating that “**Access to this component not allowed without subscription**” (this message is customizable via the **CBSubs™** language plugin) and our registration form is displayed and the Content Access Plan is selected (see checkbox).

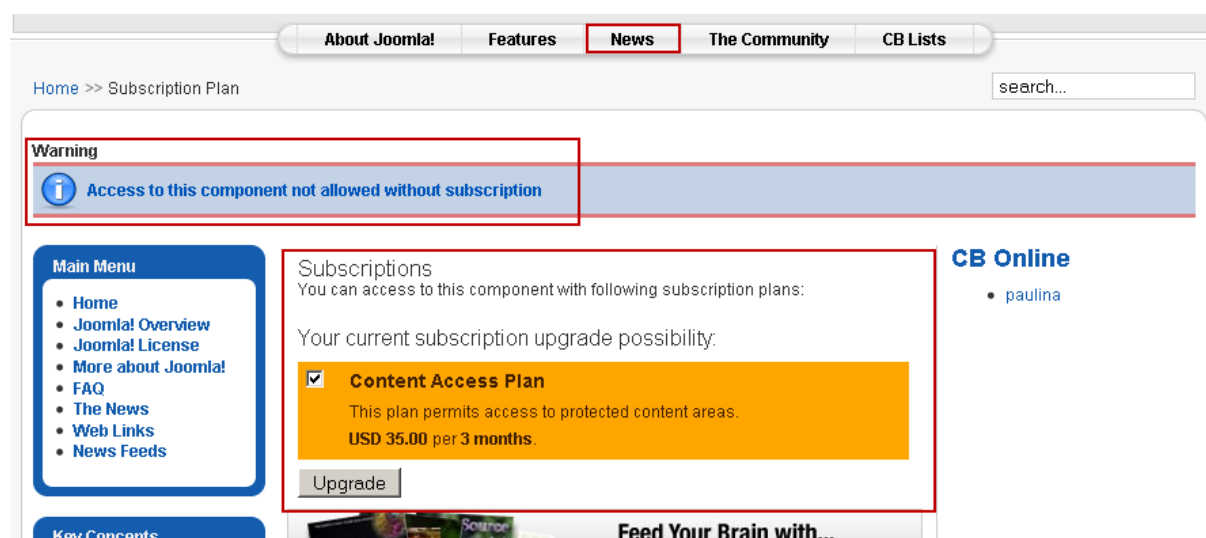


Figure 315: GUC4 CBSubs blocking and proposing upgrade

A similar scenario is illustrated in **Figure 315**, where we see that a registered member not subscribed to our plan will also be blocked when trying to view protected content but instead of a registration form, **CBSubs™** displays the warning message and a subscriptions upgrade proposal.

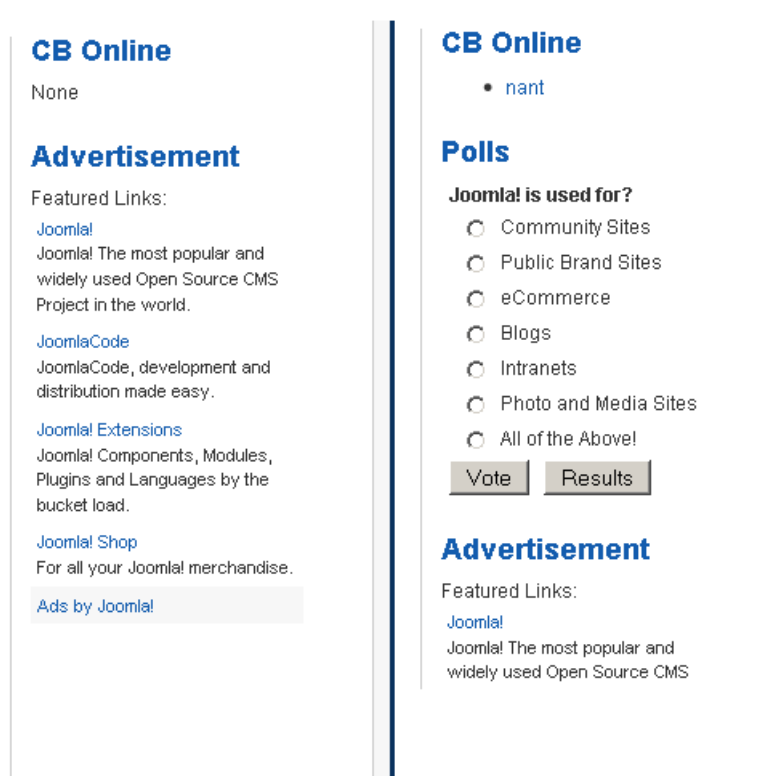


Figure 316: GUC4 Protected module viewing

In **Figure 316** we see what our website front page looks like for non-plan subscribers and for plan subscribers.

GUC4: Content Access Plan (product-type: user subscription)		
Presentation tab		
Presentation	Name of plan:	Content Access Plan
	Alias of plan:	CA-Plan
	Description of plan:	This plan permits access to protected content areas. Certain articles, components and modules are only accessible for subscribers to this plan.
	Price display of plan:	[AUTOMATIC]
Pricing tab		
Pricing	Currency:	Same as global configuration
	Is the first amount and period different:	Always same period and price
	Regular price of plan:	35
	Regular validity duration:	3 months
	Total number of occurrences of regular validity/price:	0 (unlimited)
	Prorate remaining value of this plan when upgrading:	No
	Renewable in advance by:	Only after expiration
	Grace period before real expiration:	None
Workflows		
Workflows	Auto-recurring renewals:	Users choice: leave choice to user (*)
	Selected by default:	No
	Allow registration:	Yes
	Propose spontaneously plan at registration:	Yes, show automatically plan for normal registrations (recommended)
	User Email Confirmation:	Default (CB settings)
	User Approval by Moderator:	Default (CB settings)
	Allow upgrades to this:	Yes
	Propose spontaneously plan for upgrades	Yes, show automatically plan for normal upgrades (recommended)
Multiple subscriptions per user		Only one at a time

Figure 317: GUC4 Content Access Plan Key Parameters

14.5 GUC5 Joomla!polis Use Case

This use case will focus around how the Joomla!polis website uses **CBSubs™** to manage its membership offerings. Joomla!polis membership is characterized by the following attributes:

- Website public viewers are allowed to browse content but are not permitted to download Community Builder releases (only registered members are permitted to download).
- Members can become Lifetime members of Joomla!polis for free and are granted access to free forums and are permitted to download any public CB stable releases along with selected public CB Team releases.
- Members can upgrade their Free Lifetime status and become CB Documentation subscribers for 12 months by paying 25 Euros. Documentation subscribers are permitted to download the detailed CB documentation along with other items available during their 12-month subscription period, CB Documentation subscribers are also recognized in their CB user profile by a CB field that is set appropriately.
- New applicants may also directly register as CB documentation subscribers by paying the appropriate fee directly during the initial registration process.
- Site members may also purchase a single license to download and use the MyCommunity templates (CMS and CB) on a single website. The single license fee is set to 20 euros and once paid the purchaser is granted access to download the relevant package from the protected download area. Users may purchase as many times as needed to handle multiple websites.
- Finally, website users can donate any amount at any time (during registration or later on).

We will configure this scenario using the following ingredients:

- **Joomla** 1.5.20 CMS (although Joomla!polis is currently running on Joomla 1.0 series)
- **CB 1.3+** (prerequisite, remember?)

- **CBSubs™ 4.1** Core plugin (see **Chapter 6.3**)
- **DOCman** version 1.5.7+ stable Joomla component (if working on Joomla 1.5 website or earlier version for Joomla 1.0 website) – Installation instructions and usage of **DOCman** are not provided here and familiarization with **DOCman** is assumed.
- *Error! Reference source not found.* integration plugin (see **Chapter Error! Reference source not found.** and **Chapter 7.5.6.1**)
- **CBSubs CB Field** integration plugin (see **Chapter 6.4** and **Chapter 7.5.6.6**)
- **CBSubs Fields Tabs Protect** integration plugin (see **Chapter 6.10** and **Chapter 11**) for extended use case (see below)
- **CBSubs Plans Image** integration plugin (see **Chapter 6.12** and **Chapter 7.5.6.11**) for extended use case (see below)

As an extension to the actual situation on JoomlaPolis we will also configure the following extra functions:

- Each CB Doc subscriber will get a nice profile image in his/her user status area. This way other users can see that he is a CB Doc subscriber.
- Each CB Doc subscriber will get an extra CB tab that will contain a CB delimiter field with useful information and links regarding his/her subscription. We will also use the CB substitution mechanism to display an extra message in this extra tab that will appear when non-Doc subscriber members are viewing the tab in a Doc subscriber's profile. This message will be personalized and will urge the non-Doc subscriber viewer to subscribe in order to have similar benefits.

14.5.1 GUC5 Configuring DOCman

The first thing we need to do is to setup our protected download packages using our installed **DOCman** component. We will not go into details, but we need to create 2 **DOCman** groups that will be used to protect relevant download packages for CB Documentation subscribers and for MyCommunity purchasers. We have created these 2 **DOCman** groups named: '**CB Documentation Subscribers Group**' and '**MyCommunity Template Group**'. We have also used our **DOCman** component to upload 2 initial packages and protect them as **DOCman** documents by instructing

DOCman that only member of these 2 groups are permitted to download. This is illustrated in **Figure 318**.

Figure 318: GUC5 DOCman protected documents

We can of course upload more items for both groups, but for the purpose of this use case one item in each group is sufficient to demonstrate things.

14.5.2 GUC5 Configuring CB Fields for use case

We can use CB fields to track active membership on our site. For simplicity we can create 3 CB fields, one for each case. One CB field will be used to mark if a member is currently a CB Documentation subscriber, another CB field can be used to track if a given member has purchased (one or more copies of) the MyCommunity product and finally a third CB field can be used to mark if a member has donated (one or more times). Using the CB Fields Management panel we have created 4 new CB fields:

- The '**cb_cbdoc**' field titled **CB-Doc Subscriber**. This is a Yes/No (1/0) single checkbox type field. We have made this field 'read-only' and have stated that it should not appear during the registration process (doesn't really make sense for it to appear since it is read only). We have assigned this CB field to appear in the '**Contact Info**' tab but it might just as well be placed in the '**User Status**' tab area. These attributes are illustrated in **Figure 319**.
- The '**cb_mycommunity**' field titled **MyCommunity**. This is also a Yes/No single checkbox type field with similar attributes as the '**cb_cbdoc**' field we previously created.

- Similarly, we created the '**cb_donator**' field titled **Donator**.

The screenshot shows the configuration interface for a single checkbox field. The 'Type' is set to 'Check Box (Single)'. The 'Tab' is 'Contact Info', 'Name' is 'cb_cbdoc', and 'Title' is 'CB-Doc Subscriber'. The 'Description/Tip' field contains the text: 'This Yes/No (checkbox) field is used to track if a user is currently a CB Documentation subscriber or not.' Below the description is a rich text editor toolbar. At the bottom, there are several settings: 'Pre-filled default value at registration only' (empty), 'Required?' (No), 'Show on Profile?' (Yes: on 1 Line), 'Display field title in Profile?' (Yes), 'Searchable in users-lists?' (No), 'User Read Only?' (Yes), 'Show at Registration?' (No), 'Published' (Yes), and 'Size' (0). The 'User Read Only?' and 'Show at Registration?' options are highlighted with a red box.

Figure 319: GUC5 Creating a CB single checkbox field


Finally our fourth CB field is of type Checkbox (Multiple) and we have assigned the following 3 permissible values:

- CB-Doc
- MyCommunity
- Donator

We have named this multi-select checkbox CB field '**cb_memstatus**' with a title of **Member Status** and also made it 'read-only'.

Our 4 CB fields have been created and we can now proceed with further preparations before the actual configuration of our 4 **CBSubs™** plans.

14.5.3 Plan Image for CB-Documentation Subscription plan

One of the extensions we have decided for our advanced use case is to provision a nice image on user profiles (in user status area) for our CB-Documentation subscribers. This way profile visitors will see this nice cool image-icon and perhaps also consider subscribing to the service. We could of course construct our own image if we are graphically inclined and are expert users of Photoshop. Unfortunately not everyone is. We have chosen to use the cool '80x15 Brilliant Button Maker' available at <http://www.lucazappa.com/brilliantMaker/buttonImage.php> for free. Using this nice tool we have constructed the following 80x15 image for our CB-Documentation subscribers: . We have saved this image as **-cbdocsub.png** and uploaded it to our stories folder using our CMS Media manager (in Joomla 1.5.x this is found at the Site → Media Manager menu). We must upload our image in this specific area because this is where our **CBSubs Plans Image** integration plugin will search for it (see **Chapter 7.5.6.11**).

14.5.4 GUC5 Configuring 4 CBSubs™ Plans

In order to fulfill the use case requirements we are working on, we must create four (4) **CBSubs™** plans (see **Figure 320** for plan summary view) of the following nature:

- A User Subscription plan that is a FREE lifetime plan. This plan is needed to serve as the default subscription plan for all members. See **Figure 335** for key parameters details of this plan setup.
- A CB Documentation User Subscription plan with a 1 year duration period and a 25 euro cost. Active subscribers to this plan will be awarded download privileges to the **DOCman 'CB Documentation Subscribers Group'** created in **Chapter 14.5.1**. We will also allow members to be able to renew in advance if they want (1 year advance). See **Figure 336** for key parameters of plan and **Figure 321** and **Figure 322** for integration sub-tab settings.
- A Merchandise plan that will cost 20 euros and will give access to the relevant download area protected by the DOCman '**MyCommunity Template Group**' create in **Chapter 14.5.1**. The key parameters for this plan are illustrated in **Figure 337**.

- A Donation plan that will propose specific donation amount levels but will also permit the user to enter any amount desired. The key parameters for this plan are illustrated in **Figure 338**.

#	<input type="checkbox"/>	Plan Name	Alias	Exclusive	Price per period	Validity	Maximum recurrings	Price first period	First period validity	Order		Published	Allow new subscriptions	Allow registration	Allow upgrade to this
1	<input type="checkbox"/>	Free Joomla!polis Membership subscription	Free	✓	Free	Lifetime subscription	unlimited	-	No initial validity	▼	1		✓	✓	✓
2	<input type="checkbox"/>	Community Builder Documentation Subscription	Doc Subscriber	✓	EUR 25.00	1 year	unlimited	-	No initial validity	▲ ▼	2		✓	✓	✓
3	<input type="checkbox"/>	MyCommunity template	MyCommunity	✗	EUR 20.00	-	unlimited	-	-	▲ ▼	3		✓	✗	✓
4	<input type="checkbox"/>	Donate to CB	Donation	✗	-	-	unlimited	-	-	▲ ▼	4		✓	✓	✓

Figure 320: GUC5 Plans in summary view

As mentioned, our 4 plans shown in summary view in **Figure 320** are created following the process outlined in **Chapter 7.5** taking into account the key parameters shown in **Figure 335**, **Figure 336**, **Figure 337** and **Figure 338**.

We will now concentrate on the actual integration settings that must be configured for each of our **CBSubs™** plans.

14.5.4.1 GUC5 CB Fields Integration for Doc Subscriber Plan

As mentioned earlier, we want to keep track of our CB-Doc subscribers by setting a CB checkbox field automatically when a user subscribes to the plan and deselecting it once again automatically when the CB-Doc subscription ends. Earlier, in **Chapter 14.5.2**, we created our **CB-Doc Subscriber** checkbox CB field and also a **Member Status** multi-select checkbox CB field. We now need to configure our **CBSubs™** 'Community Builder Documentation Subscription' plan and properly set desired values in the **CB Fields** sub-tab (see **Chapter 7.5.6.6** for general instructions) of the plan **Integrations** tab. This configuration is illustrated in **Figure 321**, where we see that we have assigned the value '1' to the first CB-Doc Subscription single checkbox field and the value 'CB-Doc' to the second Member Status multi-select checkbox field.

Field 1

Field: CB-Doc Subscriber

Value: 1

Remove value on plan deactivation: Yes

Operator: Set: Field = Value

Field 2

Field: Member Status

Value: CB-Doc

Remove value on plan deactivation: Yes

Operator: Set: Field = Value

Figure 321: GUC5 CB Field integration sub-tab for Doc Subscriber plan

14.5.4.2 GUC5 DOCman Integration for Doc Subscriber Plan

We must now configure our DOCman integration sub-tab in our **CBSubs™** ‘Community Builder Documentation Subscription’ plan to automatically add and remove subscribers to the relevant DOCman group we created back in **Chapter 14.5.1**. In **Figure 322** we illustrate the proper setting (see **Chapter 7.5.6.1** for general instructions).

CB Fields Docman Plan Image

Docman groups of user changing on plan activation and deactivation:

Subscription 1 groups: --- Select (CTR/CMD-click: multiple) ---
CB Documentation Subscribers Group
MyCommunity Template Group

Remove groups on plan deactivation: Yes

Figure 322: GUC5 DOCman integration sub-tab for Doc Subscriber plan

14.5.4.3 GUC5 Plan Image Integration for Doc Subscriber Plan

One of the new features we decided to add to this use case compared to the actual situation originally deployed on Joomla!polis is to add a nice plan image to all profiles of CB Documentation subscribers. We have already constructed such an image back in **Chapter 14.5.3** and have uploaded it via our CMS Media Manager to the proper Stories folder and named the image file ‘**-cbdocsb.png**’.

If everything earlier described was successfully completed, we should be able to see this image filename as a drop-down option in the Image: parameter of our plan Image

Integrations sub-tab as illustrated in **Figure 323** (see **Chapter 7.5.6.11** for general instructions).

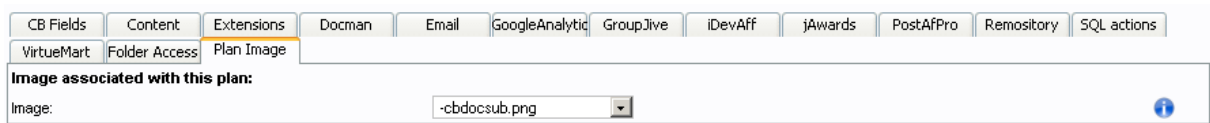
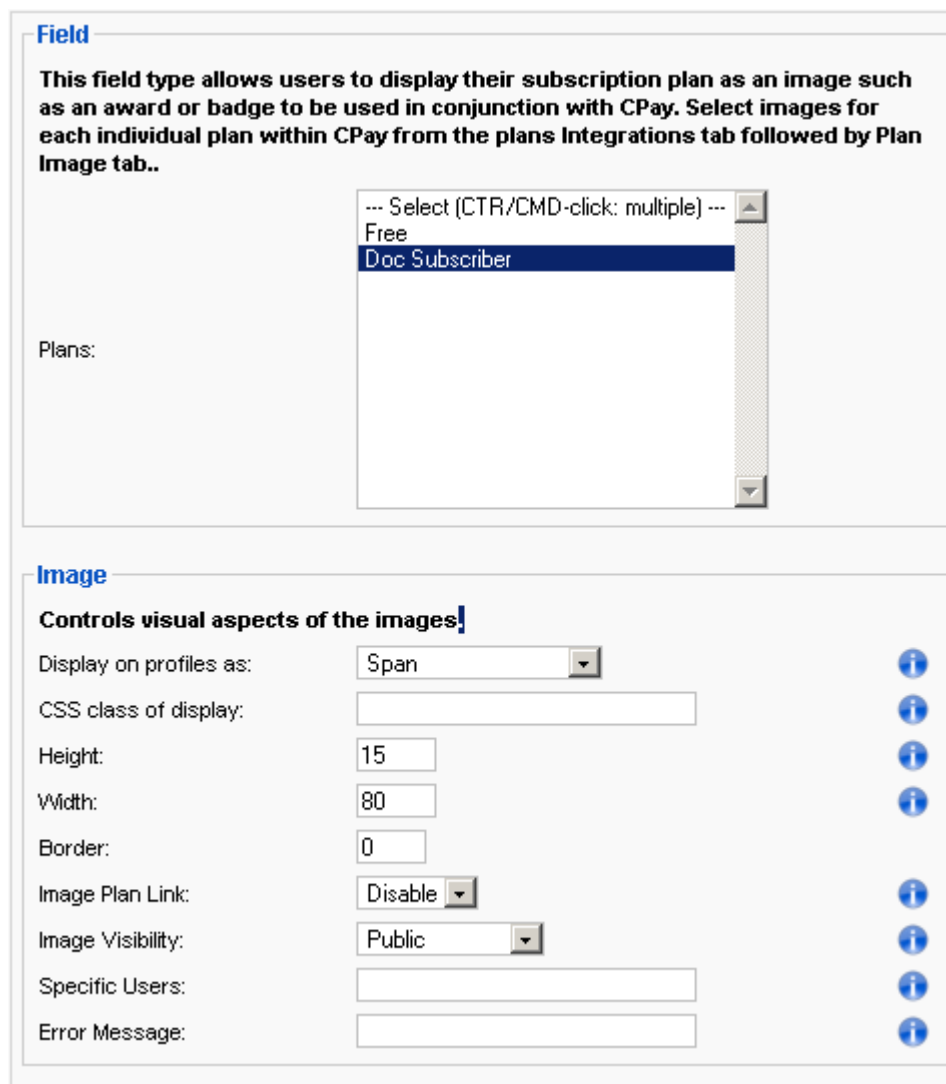


Figure 323: GUC5 Plan Image for Doc Subscriber plan

There is one more step to complete the plan image assignment task. We must of course create the CB plan image field that will actually host this image assignment. This is accomplished by creating a new CB Field of type 'Plan Image' and configuring the extra parameters illustrated in **Figure 324**.



Field

This field type allows users to display their subscription plan as an image such as an award or badge to be used in conjunction with CPay. Select images for each individual plan within CPay from the plans Integrations tab followed by Plan Image tab..

Plans:

- Select (CTR/CMD-click: multiple) ---
- Free
- Doc Subscriber

Image

Controls visual aspects of the images

Display on profiles as: Span

CSS class of display:

Height: 15

Width: 80

Border: 0

Image Plan Link: Disable

Image Visibility: Public

Specific Users:

Error Message:

Figure 324: GUC5 Plan image CB field for Doc subscriber plan

Notice that in **Figure 324** we have set the Height and Width values to match our 80x15 brilliant image button that we constructed back in **Chapter 14.5.3**.

14.5.4.4 GUC5 Doc-Sub Tab Protected for Documentation Subscribers

Another addition compared to the original Joomlapolis use case is the creation of a special CB Tab that only Documentation subscribers get on their user profile. The CB Tab will be named 'Doc-Subs' and we can see its setup in **Figure 325**.

The screenshot shows the 'Tab Details' configuration form in Joomla! Community Builder. The form is titled 'Tab Details' and contains the following fields and options:

- Title:** A text input field containing 'Doc-Subs'. To its right is the text 'Title as will appear on tab.'
- Description:** A text area containing the text 'This description appears only on user edit, not on profile (For profile text, use delimiter fields):'. Below this is a rich text editor toolbar with various icons for text formatting, alignment, and insertion. The text area itself contains the text 'This tab is provisioned only for CB documentation subscribers and contains useful information regarding the CB Documentation subscription current benefits.'
- Contact Image:** A button with a small image icon.
- Pagebreak:** A button with a small icon.
- Readmore:** A button with a small icon.
- Publish:** A dropdown menu set to 'Yes'.
- Profile ordering:** A dropdown menu set to '102 (Doc-Subs)'. To its right is the text 'Tabs and fields on profile are ordered as follows:' followed by a list:
 1. position of tab on user profile (top-down, left-right)
 2. This ordering of tab on position of user profile
 3. ordering of field within tab position of user profile.
- Registration ordering (default value: 10):** A text input field containing '10'. To its right is the text 'Tabs and fields on registration are ordered as follows:' followed by a list:
 1. This registration ordering of tab
 2. position of tab on user profile (top-down, left-right)
 3. ordering of tab on position of user profile
 4. ordering of field within tab position of user profile.
- Position:** A dropdown menu set to 'Main area (below left/middle/right)'. To its right is the text 'Position on profile and ordering on registration.'
- Display type:** A dropdown menu set to 'Tabbed pane'. To its right is the text 'In which way the content of this tab will be displayed on the profile.'
- User Group to allow access to:** A dropdown menu with a list of user groups: '- Everybody -', '- All Registered Users -', 'Public Front-end', and '- Registered'. To its right is the text 'All groups above that level will also have access to the list.'

Figure 325: GUC5 Doc-Subs CB Tab setup

This CB tab will eventually contain only one CB field in it, a delimiter field with a title of '**Doc-Subs Info**' (field name will be ***cb_docsubsd*** as we will see in the next section).


In addition to the CB Tab parameters that appear in **Figure 325**, the installation and publication of the **CBSubs Fields Tabs Protect** integration plugin (described in **Chapter 6.10** and **Chapter 11**) will enable us to set extra parameters as illustrated in **Figure 326** and **Figure 327**.

The screenshot shows a configuration window titled 'A. Tab availability by Owner's Subscriptions:'. At the top, there is a dropdown menu set to 'Yes, CB subs control tab availability'. Below this, the section 'A. Availability depending on profile Owner's subscriptions' is expanded. It contains two sub-sections: '1) For other viewers:' and '2) For Profile owner himself:'. In the first sub-section, 'Owner Plans controlling tab available in profile:' is set to 'Doc Subscriber' in a list box. In the second sub-section, 'Still Available for Profile Owner himself:' is set to 'Yes: owner's tab available for profile owner', and 'Positive access message to Owner (CB 1.2 : Edit mode only, CB 1.2.1: Profile view mode too):' is an empty text field. Information icons are present next to several settings.

Figure 326: GUC5 Protecting Doc-Subs Tab Availability


With the 'A. Tab availability by Owner's Subscriptions:' parameter set illustrated in **Figure 326**, we have specified that only 'Doc Subscribers' get this CB Tab and that they can always see it independent of how we limit the CB Tab visibility in the 'B. Tab visibility by Viewer's subscriptions:' parameter set shown in **Figure 327**.


In **Figure 327**, we have specified that 'Free' subscribers only are permitted to view this CB Tab when viewing user profiles. We have however specified that profile owners can still view their own tab and that CB moderators can also view this tab on other profiles. So basically, we have created a CB Tab and have used the extra parameters provided by the **CBSubs Fields Tabs Protect** integration plugin to give this CB Tab to profiles of Documentation subscribers but at the same time allow 'Free' plan subscribers to see this tab when viewing other profiles. So 'Free' plan subscribers will be able to see this tab on profiles of Documentation plan subscribers.

B. Tab visibility by Viewer's Subscriptions: Yes, viewer's CB subs control detailed visibility 


B. Visibility depending on Viewer's subscriptions

1) For other viewers:

Viewer Plans controlling tab visibility by viewer (none means not controlled): ... Select Plans/Products (CTR/CMD-click: multiple) ... 
Free
Doc Subscriber

Viewer Plans controlling tab searchable (none means not controlled): ... Select Plans/Products (CTR/CMD-click: multiple) ... 
Free
Doc Subscriber

2) For Profile owner himself:

Still Viewable for Profile Owner himself: Yes: profile owner can still view his own tab 

3) For Moderators:


Still Viewable for Moderators: Yes: moderators can still view tab 

Figure 327: GUC5 Protecting Doc-Subs Tab Visibility

We will see however in the next section, that the CB delimiter field that will be placed in this CB Tab will transform itself depending on the actual viewer to create a cool marketing message for 'Free' plan members when viewing user profiles of 'Documentation' plan members.

14.5.4.5 GUC5 CB Delimiter Field for Doc-Subs Tab

Now that we have create and protected our 'Doc-Subs' CB tab, we will continue with the creation of a single CB delimiter field that will appear on this tab.

The CB delimiter field definition is illustrated in **Figure 328**, where we see that the field is set to appear without a title and of course it will not appear during registration. In this figure we see that we have not marked the field as read only – delimiter field are read only by nature.

Type: Fields delimiter

Tab: Doc-Subs

Name: cb_docsubsdf

Title: Doc-Subs Info

Description/"I" field-tip: text or HTML:

B I U ABC | [List Icons] | -- Styles -- Paragraph -- Font family --

[Rich Text Editor Icons]

[cb;if user = "#me" cb_cbdoc! = "1"]Hello [cb:userdata field= "username" user = "#me" /]why are you not a doc subscriber? If you were a doc subscriber, you would also have a tab like this in your profile and it would be full of links to download many extra CB Team plugins and of course the detailed CB documentation[/cb;if] [cb;if user_id = "myid"]Thank you [username]for supporting us as a CB Documentation Subscriber!

Your [Documentation Subscription download area](#) currently contains the following:

- [CB 1.2 Stable Detailed Documentation](#)

Contact Image Pagebreak Readmore

Required?: No

Show on Profile?: Yes: on 1 Line

Display field title in Profile?: No

Searchable in users-lists?: No

User Read Only?: No

Show at Registration?: No

Published: Yes

Size: 0

Figure 328: GUC5 CB delimiter field for Doc-Subs tab

In **Figure 329**, we see that we have used CB substitution logic to control and personalize the actual data that will appear in this CB delimiter field.

```
[cb:if user="#me" cb_cbdoc!="1"]Hello \[cb:userdata field="username" user="#me" /\] why are you not a doc subscriber? If you were a doc subscriber, you would also have a tab like this in your profile and it would be full of links to download many extra CB Team plugins and of course the detailed CB documentation[/cb:if] [cb:if user_id="myid"]Thank you \[username\] for supporting us as a CB Documentation Subscriber!
```

Your [Documentation Subscription Download area](#) currently contains the following:

- [CB 1.2.3 Stable Detailed Documentation](#)
- [CB Captcha Plugin 2.2.2](#)

```
[/cb:if]
```

Figure 329: GUC5 CB substitutions in delimiter field


The `[cb:if user="#me cb_cbdoc!="1"]` construct will allow us to determine if the current viewer is a Documentation subscriber or not. Remember, back in Chapter 14.5.2, we created a CB single checkbox field with a fieldname of ***cb_cbdoc*** and we have instructed our ***CBSubs CB Field*** integration plugin to give the value of '1' (meaning True/Yes) to this field for Documentation subscribers. The `[cb:if user_id="myid"]` construct allows us to make sure that the proper message only appears when the actual profile owner is viewing the delimiter field.

The end result of all of this is illustrated in **Figure 330**, where we see the end result of this delimiter field and the protected tab when a profile owner is viewing their CB user profile. We see the Doc-Subs tab and also a nice personalized thank you message along with quick links to Documentation protected areas. In **Figure 332**, we see how the delimiter field appears when being viewed by a 'Free' plan subscriber. In these figures we also can see the nice brilliant image badge we provisioned for Documentation subscribers. Very powerful stuff indeed!

Community

Edit


Paulina Profile Page



Hits:

3

Online Status:

 ONLINE

Member Since:

19 hours ago

Last Online:

3 hours ago


Last Updated:

4 minutes ago

Connections:

-

Plan Images:



Contact Info

Subscription

Doc-Subs

Thank you [Paulina](#) for supporting us as a CB Documentation Subscriber!
Your [Documentation Subscription download area](#) currently contains the following:

- [CB 1.2 Stable Detailed Documentation](#)
- CB Captcha Plugin 2.2RC4

Figure 330: GUC5 Doc-Subs tab view by profile owner


Once again, **Figure 330** illustrates how a user profile of a Documentation subscriber would appear when viewed by the owner. Notice again the Plan images: field in the

user status area and also the personalized delimiter field in the Doc-Subs provisioned CB tab.

Community

Edit


paulina Profile Page



Hits:

3

Online Status:

 ONLINE

Member Since:

19 hours ago

Last Online:

3 hours ago


Last Updated:

15 minutes ago

Connections:

-

Plan Images:



Contact Info

Subscription

Doc-Subs

paulina

CB-Doc Subscriber:

Yes

MyCommunity:

No

Donator:

No

Member Status:

CB-Doc

Figure 331: GUC5 CB fields denoting CB-Doc subscription status

In **Figure 331**, we see the CB-Doc Subscription field value of a Documentation subscriber (set to Yes) and also we see that the Member Status: field is set to CB-Doc.


Community

View

Messages

Moderation


paulina Profile Page



Hits:

2

Online Status:

 OFFLINE

Member Since:

19 hours ago

Last Online:

3 hours ago


Last Updated:

23 seconds ago

Connections:

-

Plan Images:



Contact Info

Doc-Subs

Hello [admin](#) why are you not a doc subscriber? If you were a doc subscriber, you would also have a tab like this in your profile and it would be full of links to download many extra CB Team plugins and of course the detailed CB documentation


Figure 332: GUC5 Doc-Subs tab view by non-Doc subscriber

Comparing **Figure 333** to **Figure 331**, we see what a user profile looks like when a Documentation subscriber purchases a MyCommunity template.

Community

Edit


Paulina Profile Page



Hits:

6

Online Status:

 ONLINE

Member Since:

36 hours ago

Last Online:

3 hours ago


Last Updated:

17 hours ago

Connections:

-

Plan Images:



Contact Info

Subscription

Doc-Subs

Paulina

CB-Doc Subscriber:

Yes

MyCommunity:

Yes

Donator:

No


Member Status:

CB-Doc, MyCommunity

Figure 333: GUC5 CB fields denoting MyCommunity purchase status

The remaining of this chapter provides us with key settings of the 4 **CBSubs™** plans mentioned earlier. We have not included detailed instructions regarding the needed integration sub-tab population for the MyCommunity plan and the Donation plan. It should be easy enough to figure out based on the integration settings of the Documentation subscription plan, so consider it an exercise to be completed.

Finally, for the sake of completeness, we have included in **Figure 334** the resulting registration form. Notice that the Merchandise plan (MyCommunity) does not appear here because we selected that it should only appear as an upgrade option.


Joomla!
...because open source matters

Download
CB User Lists

Main Menu

- Home

CB Login
Username

Password

☐ Remember me

[Forgot login?](#)
No account yet? [Register](#)

CB Workflows

CB Online
None



























CB Subscriptions

Registration
Required field | Field visible on your profile | Field not visible on profile | Information: Point mouse to icon

Subscription Plan:

- ☒ **Free JoomlaPolis Membership subscription**
JoomlaPolis membership is offered free of charge. The JoomlaPolis site is the home of the open-source Community Builder, Joomla's most popular component.
As a JoomlaPolis member, you will be able to download the latest Community Builder suite (CB) stable version (CB 1.2 currently) and a PDF installation guide for CB 1.2. Also a number of CB plugins can be found on the download area of the site. In addition, you will also get free access to our forums, where community members can assist each other.
Free per Lifetime Subscription.
- ☐ **Community Builder Documentation Subscription**
To help you getting started quicker on your project and allow you to make the best use of Community Builder, we have written a detailed documentation entitled "Community Builder 1.2 - Reference Guide" (that is **for the brand new CB 1.2 Stable**, there is also one for CB 1.1). This detailed manual provides additional information regarding the installation, configuration and use of the Community Builder suite. A bonus document details private messaging integration, and other bonuses documents will follow as time permits.
This additional document is provided on a paid subscription basis (subscription fees are used towards development expenses, development tools, etc). The detailed documentation contains now over 180+ pages (140+ for CB 1.1) of Community Builder CB 1.2 specifics (2 MB pdf file), and is updated at each new CB release.
While not a prerequisite for using CB, this recommended documentation will save you valuable time and provide you with an in-depth view on CB configuration and administration possibilities. It will help you build your community web site better and faster. Of course it includes all benefits of the Free JoomlaPolis Membership as well.
This is a full year (12 months) subscription service, which you can subscribe now, or later from your user profile. This subscription also includes bonus CB documentation from the CB team, as they get available, and also as an extra-thank-you, download access to the CB Captcha 2.0 plugin for CB 1.1 and CB 1.2 and soon the announced Privacy Plugin. You will find [more information about this in this documentation description \(opens in separate window\)](#).
We hope that you will choose to subscribe to this optional plan, as your subscription is a great way to support CB and allows us to spend even more dedicated time on the next releases of Community Builder which are in the works. It really makes a big difference to us and to the new features of upcoming CB releases.
This subscription plan illustrates a new - still under development, but smoothly running - subscriptions plugin, which will give you instant download access to the documentation and extras upon payment. We use paypal as payment gateway, so your payment is secure and your data stays private. You can pay easily and securely with any major credit-card worldwide for instant download (no need to open a Paypal account).
As additional "thank-you" and to give you another good reason to subscribe now, documentation subscribers have early access to new (**tested** RC) releases of CB and of CB plugins. Right now only documentation subscribers have access to updated CB Team CB plugins which are now **native** for Joomla 1.0+1.5+mambo and have new features: CB ProfileGallery, CB ProfileBook (new with member guestbook, **blog** and **wall** tabs), new CB Captcha 2.2RC3 (will stay subscribers-only), CB member auto-welcome plugin, new CB content module allowing to place CB content in joomla/mambo modules (all natively).
Update: now the brand new **Ajax Ratings field** RC and the brand new **Ajax Text field** RC (including **awesome color bubbles coming in 14 colors**) are now available only to doc subscribers.
Now is a great time to subscribe to the documentation service. The CB Team is considering a service upgrade of 10 euros (from 25 euros to 35 euros), so this is the right time to start or to renew to extend by a full 12 months your subscription. 🙌
1 year for EUR 25.00 (≈ USD 33.19).
- ☐ **Donate to CB**
If you wish to help us cover infrastructure cost and development time, please consider donating a small (or a big 🙌) amount to Community Builder. This is an easy opportunity to do so now. Donations can also be selected and paid together with documentation subscriptions (but for a documentation subscription you need to also select "Community Builder Documentation Subscription" above, or already be a documentation subscriber).

Select amount

First Name:    
Middle Name:  
Last Name:    
Email:    
Username:    
Password:    
Verify Password:    

Required field | Field visible on your profile | Field not visible on profile | Information: Point mouse to icon

Powered by Joomla!, valid XHTML and CSS.

Figure 334: GUC5 Registration Form with Subscription options

GUC5: FREE Lifetime Plan (product-type: user subscription)		
Presentation tab		
Presentation	Name of plan:	Content Access Plan
	Alias of plan:	CA-Plan
	Description of plan:	This plan permits access to protected content areas. Certain articles, components and modules are only accessible for subscribers to this plan.
	Price display of plan:	[AUTOMATIC]
Pricing tab		
Pricing	Currency:	Same as global configuration
	Is the first amount and period different:	Always same period and price
	Regular price of plan:	0
	Regular validity duration:	Lifetime
	Total number of occurrences of regular validity/price:	0 (unlimited)
	Prorate remaining value of this plan when upgrading:	No
	Renewable in advance by:	Only after expiration
	Grace period before real expiration:	None
	Auto-recurring renewals:	Users choice: leave choice to user (*)
Workflows		
Workflows	Selected by default:	No
	Allow registration:	Yes
	Propose spontaneously plan at registration:	Yes, show automatically plan for normal registrations (recommended)
	User Email Confirmation:	Default (CB settings)
	User Approval by Moderator:	Default (CB settings)
	Allow upgrades to this:	Yes
	Propose spontaneously plan for upgrades	Yes, show automatically plan for normal upgrades (recommended)
	Multiple subscriptions per user	Only one at a time

Figure 335: GUC5 Free Lifetime Plan Key Parameters

GUC5: CB Doc Subscriber Plan (product-type: user subscription)		
Presentation tab		
Presentation	Name of plan:	Community Builder Documentation Subscription
	Alias of plan:	Doc Subscriber
	Description of plan:	To help you getting started quicker on your project and allow you to make the best use of Community Builder, we have written a detailed documentation entitled “Community Builder 1.2.3 – Reference Guide” (that is for the brand new CB 1.2.3 Stable ; there is also one for CB 1.1). This detailed manual provides ...
	Price display of plan:	[AUTOMATIC]
Pricing tab		
Pricing	Currency:	Same as global configuration
	Is the first amount and period different:	Always same period and price
	Regular price of plan:	25
	Regular validity duration:	1 year
	Total number of occurrences of regular validity/price:	0 (unlimited)
	Prorate remaining value of this plan when upgrading:	Yes
	Renewable in advance by:	1 year
	Grace period before real expiration:	1 week (7 days)
	Auto-recurring renewals:	No, single payment at a time
Workflows		
Workflows	Selected by default:	No
	Allow registration:	Yes
	Propose spontaneously plan at registration:	Yes, show automatically plan for normal registrations (recommended)
	User Email Confirmation:	No (override CB)
	User Approval by Moderator:	Default (CB settings)
	Allow upgrades to this:	Yes
	Propose spontaneously plan for upgrades	Yes, show automatically plan for normal upgrades (recommended)
	Multiple subscriptions per user	Only one at a time

Figure 336: GUC5 Doc Subscriber Plan Key Parameters

GUC5: MyCommunity Template Plan (product-type: merchandise)		
Presentation tab		
Presentation	Name of plan:	MyCommunity template
	Alias of plan:	MyCommunity
	Description of plan:	Select this upgrade to purchase the MyCommunity template from Joomla!polis for 1 live site (same license can be used for development and test sites). You can purchase as many times as you need. By purchasing this template you agree ...
	Price display of plan:	[PRICE] per website
	Exclusive plan:	Not exclusive, other plans of same parent can be subscribed at same time
Pricing tab		
Pricing	Currency:	Same as global configuration
	Regular price of plan:	20
	Total number of occurrences of regular validity/price:	0 (unlimited)
	Prorate remaining value of this plan when upgrading:	No
	Payment item text:	[PREFIX_TEXT] [ITEM_NAME] 1-site-license for [USERNAME]
	Payment processor text item (short):	[PREFIX_TEXT] [ITEM_ALIAS] 1-site-license
Workflows		
Workflows	Selected by default:	No
	Allow registration:	No
	Allow upgrades to this:	Yes
	Propose spontaneously plan for upgrades	Yes, show automatically plan for normal upgrades (recommended)

Figure 337: GUC5 MyCommunity plan key parameters

GUC5: Donation Plan (product-type: donation)		
Presentation tab		
Presentation	Name of plan:	Donate to CB
	Alias of plan:	Donation
	Description of plan:	If you wish to help us cover infrastructure cost and development time, please consider donating a small (or a big ✖) amount to Community Builder. This is an easy opportunity to do so now. Donations can also be selected and paid together with documentation subscriptions (but for a documentation subscription you need to also to select "Community Builder Documentation Subscription" above, or already be a documentation subscriber).
	Exclusive plan:	Not exclusive, other plans of same parent can be subscribed at same time
	Price display of plan:	[AUTOMATIC]
Pricing tab		
Pricing	Currency:	Same as global configuration
	Are donation amounts given ?:	List of suggested amounts and a free amount field
	Suggested amounts:	5,10,15,20,30,50,100,150,200,500,1000
	Default (suggested) amount:	Empty
	Minimum donation amount:	1
	Maximum donation amount:	Empty
	Prorate remaining value of this plan when upgrading:	No
Workflows		
Workflows	Selected by default:	No
	Allow registration:	Yes
	Propose spontaneously plan at registration:	Yes, show automatically plan for normal registrations (recommended)
	User Email Confirmation:	No (override CB)
	User Approval by Moderator:	Default (CB settings)
	Allow upgrades to this:	Yes
	Propose spontaneously plan for upgrades	Yes, show automatically plan for normal upgrades (recommended)

Figure 338: GUC5 Donation plan key parameters

14.6 Things you can do

The 5 use cases described in the previous chapter represent a very small sample of the extremely powerful and flexible tool **CBSubs™** has provided. It would be impossible to continue outlining possible use cases. Instead we will randomly list a number of high-level ideas that are possible to handle with **CBSubs™**. Here we go:

- Forum areas for paid plans. Even if your forum component does not support private groups, you can use **CBSubs™** and the **CBSubs Content** integration plugin to protect specific forum area (in the form of URL string) for specific plans.
- Give premium members more gallery quotas. The CB Gallery plugin (version 1.2 is currently offered to CB documentation subscribers) allows you to specify individual quotas per user. Use the **CBSubs CB Field** integration plugin to alter the relevant CB Gallery quota fields giving more items and storage to your paid members. You can even do this with a merchandise plan – pay once to get 100 items and 10 mb!
- Charge for module access. With the **CBSubs Content** integrations plugin you can hide modules based on specific plans. One example is to have a ‘my weather’ module that is only displayed for paid plan subscribers.
- Extend accessibility of extensions based on **CBSubs™** plans. **Mostree** and **SOBI** are two of the most popular directory extensions for Joomla. You can use **CBSubs™** to specify who has browse access to directory entries and even who has new entry posting privileges. All this is doable using the Extensions sub-tab available in the Plan integration tab.
- Plan hierarchies are doable. Although we have not given any use case examples we can chain **CBSubs™** plans so they form an upgrade path. For example we can have ‘silver’, ‘bronze’ and ‘gold’ plan. ‘Silver’ plan subscribers might have been charged 30 euros for 3 months. At any point in time a ‘silver’ member may chose to upgrade to a ‘bronze’ plan. **CBSubs™** will calculate the

residual value of the existing plan and offer a better upgrade price.

- We have already seen how we can handle offline payments with **CBSubs™**. More payment gateways will become available very soon.
- Merchandise plans can be used to sell specific products. If the product is in the form of an electronic package, then the plan can provide download access to it or the package (if size permits) may be attached to an email message using the **CBSubs Email** integration plugin. If the product must be shipped by another process, an email message can also be sent with all the relevant information to an external distribution organization for order fulfillment purposes.
- You can use the **CBSubs Fields Tabs Protect** integration plugin to actually turn off specific CB tabs and fields based on specific plans. For example you can configure things to provision the CB ProfileBook Blog for only premium members, or charge members for an extra profile image, etc.
- You can use **CBSubs™** to block access to website micro-areas that can be protected using the **CBSubs Folder Access** integration plugin.
- **CBSubs™** supports auto-recurring payments if your payment organization supports this (**PayPal** and **Authorize.net** both do). This means you can setup a plan that automatically charges renewal fees when a plan expiration. We can create plans that will basically charge a specific amount every month (or whatever plan duration we assign).

15 Configuring the CBSubs™ Module

The **CBSubs™** module is installed

Module parameters are:

- **Module class suffix**
This field contains the suffix of the CSS module class
- **Pre-text**
This area is used to fill in any text message that is to precede any messages generated by the module logic itself.
- **Post-text**
This area is used to fill in any text message that is to follow any messages generated by the module logic itself.
- **Greeting**
A Yes/No option to indicate if a greeting message for the user should be displayed or not.
- **Name/Username**
The format to be used for the greeting message. This option can take one of the following drop-down values:
 - Username
 - Name
 - First name
- **Display current subscriptions**
A Yes/No radio parameter that indicates if the module should display the current subscription plans that this user is subscribed to.
- **Intro of current subscriptions**
Introductory text that should precede the display of current subscriptions.
- **Display subscriptions upgrade list**
A Yes/No radio parameter that indicates if the module should display upgrade list for user.
- **Display subscriptions upgrade children**
A Yes/No radio parameter that indicates if the module should also display child upgrades.

- **Intro of upgrade possibilities**

Introductory text that should precede upgrade possibilities.

- **Message to guests**

A message that should be displayed to guests.

- **Message to non-subscribed users**

A message that should be displayed to non-subscribed users.

- **Message to subscribed users which can upgrade**

A message that should be displayed for users that have upgrade possibilities.

- **Message to subscribed users which can renew**

A message that should be displayed to users that can renew an expired plan.

- **Message to subscribed users with maximal plan**

A message that should be displayed to users that are subscribed to the most expensive – highest plan.

- **Display unpaid invoices**

A Yes/No radio parameter that indicates if unpaid invoices should be mentioned by module.

- **Message to users with unpaid invoices**

A message to users with unpaid invoices.

- Itemid of link (optional)

The CB Subscriptions module in action is illustrated in **Figure 13**.

16 CBSubs™ Language Plugins

CBSubs™ is distributed with the appropriate English language plugin (see **Chapter 6.19**). If your CMS default language is English, the only reason to install this **CBSubs™** English Language plugin is to make changes to some of the language strings. You can also use the distributed English language plugin as a basis to create your own (non-English) language plugin. These two activities will be described in the rest of this chapter.

16.1 Making changes to your CBSubs™ English language plugin

Once you successfully install your **CBSubs™** English language plugin as described in Chapter **6.19**, you should see an extra folder named 'cbpaidsubscription-en-gb' in your CB language plugin folder area:

```
{website root}
....components
....  ... com_comprofiler
....  ...  ... plugin
....  ...    ... language
....  ...    ...    .... cbpaidsubscription-en-gb
```

This 'cbpaidsubscription-en-gb' folder contains the following files and folders:

- **images** folder (currently this folder contains just an **index.php** file)
- **admin_language.php** (the language file for the administration area)
- **cbpaidsubscriptions_language.xml** (the xml file of the language plugin)
- **language.php** (the language file for all front-end translations_
- **index.html** (the index html file for our language plugin folder)

The file that contains the strings we would most likely want to modify is the 'language.php' file. Use any available text editor (notepad++ recommended) to open an edit this file. Make sure you save it as a utf-8 encoded file (following your

CMS language handling recommendations). Taking a quick look at the 'language.php' file we will see that the actual translations start with the **\$CBstrings** variable as illustrated in **Figure 339**.

```
$CBstrings = array(  
    "USD" => "USD",  
    "EUR" => "EUR",  
    "CAD" => "CAD",  
    "GBP" => "GBP",
```

Figure 339: CBSubs™ english.php file contents

The first part of the assignment statement (left of the => symbols) **must be left intact**. The second part of the assignment statement (to the right of the => symbols) can be modified (translated). For example, if we want to change the way the euro currency is displayed, we can modify our 'language.php' file as illustrated in **Figure 340**. The red portions in the figure must be kept intact!

```
$CBstrings = array(  
    "USD" => "USD",  
    "EUR" => "euro",  
    "CAD" => "CAD",  
    "GBP" => "GBP",
```

Figure 340: CBSubs™ language.php file modified contents

With this modification a currency of 100 **EUR** would now be rendered as 100 **euro**. This method should be followed to modify all default wordings to match your desired style. It is good practice to keep a copy of your modified 'language.php' file in case of a **CBSubs™** upgrade (so your changes are not over-written by the new **CBSubs™** English language plugin).

16.2 Making your own CBSubs™ language plugin

You can use the **CBSubs™** English language plugin as a template to create your own **CBSubs™** language plugin for your specific language. The steps you should follow are outlined below:

- Uncompress the CBSubs™ English language plugin (distributed as Error! Reference source not found. in your **CBSubs™** distribution package)
- Rename the 'cbpaidsubscription-en-GB' folder to match your desired language (e.g., rename to 'cbpaidsubscription-el-GR' for Greek language)
- Edit the contents of your new 'admin_language.php' and your new 'language.php' using any text editor. Change all the right hand assignment strings to your specific language. **SAVE BOTH FILES AS UTF-8 ENCODED FILES.**
- Modify the contents of the renamed 'cbpaidsubscriptions_language.xml' file to match your language changes. Specifically the following tag lines must be adjusted – **ONLY UNDERLINED RED PORTIONS MUST BE CHANGED – DO NOT CHANGE ANY GREEN PORTION:**
 - `<name>CB Paid Subscriptions - en-GB</name>`
 - `<description>Provides the English language for CB Paid Subscriptions plugin.</description>`
 - `<filename`
`plugin="cbpaidsubscriptions_language">language.php</filename>`
 - `<filename>admin_language.php</filename>`
- Compress the renamed folder to create your **cbplug_lang_cbsubs_iso-code.zip** (the iso-code part should match your language, e.g. Greek language should use el-GR, German should use de-DE, etc) package that should (if all changes were properly made) be an installable CB Plugin package.

Note: On MacOS machines, when you compress your language folder sometimes a new _MACOSX folder is automatically included in the compressed file (zip). This causes installation failures when you try to install the language plugin you created. Make sure your final zip package does not have such a folder in it.

Once again the php files of your language plugin **must** be saved as **utf-8** encoded files. Your editor should be able to handles this (look at editor's 'Save as ...' options).

17 PayPal Business Account Overview

This section is not meant to teach you about your PayPal Business account and how to set things up. If you do not have such an account and want to process payments via PayPal, then you should probably seek out professional help to ensure that you get things right. This document will not provide all the answers about your PayPal account.

Your Profile Summary page of your PayPal Business account (or PayPal Sandbox) should look like the screen shot of **Figure 341**. In this figure we have highlighted a number of important sections of concern regarding our **CBSubs™** PayPal Payment Gateway setup.

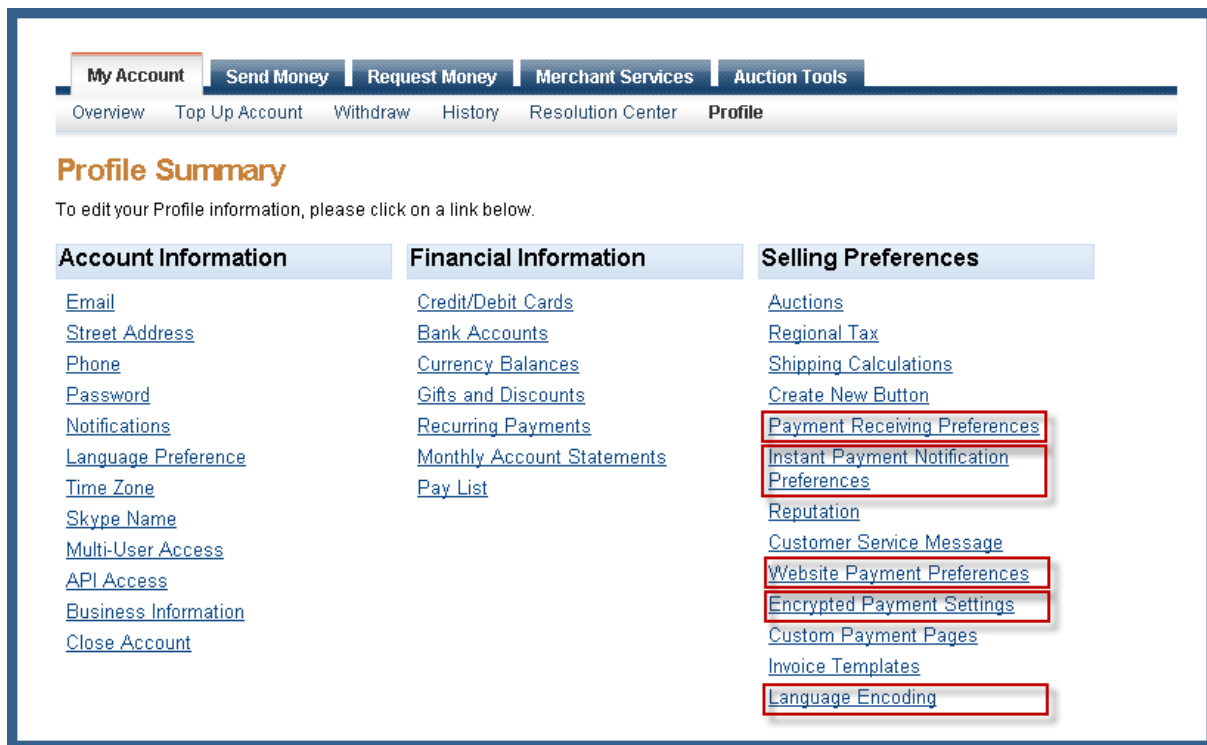


Figure 341: PayPal Business Settings of concern

Your Payment Receiving Preferences settings of your PayPal Business account should be used to setup your PayPal Business account to work with your **CBSubs™** setup. Since you want things automated a number of settings must be made on your PayPal settings.

In our screenshot (see **Figure 342**), we have chosen to accept payments of different currency (see 'Block payments sent to me in a currency I do not hold:' question) but have them converted to Euros (this is the default currency of our specific PayPal Business account used to render the screenshot). We could of course chosen 'Yes' but this would certainly result in missed sales.

Additional relevant settings in this PayPal area are the:

- Block accidental payments:
In our specific example we have chosen to block multiple payments per invoice ID.
- Block payments from users who:
In our specific example we have chosen to block payments from users initiating payments from the 'Pay Anyone' sub-tab of the Send Money tab (all these terms are PayPal specific).
- Block the following payments:
In our specific example we have chosen to block eCheck type payments.

These settings should be appropriately configured for your specific business establishment and environment. Ask PayPal for assistance or find professional help if you have questions.

The screenshot shows the 'Payment Receiving Preferences' page in a PayPal Business Account. The page has a navigation bar with tabs: 'My Account', 'Send Money', 'Request Money', 'Merchant Services', and 'Auction Tools'. Below this is a sub-navigation bar with links: 'Overview', 'Top Up Account', 'Withdraw', 'History', 'Resolution Center', and 'Profile'. The main heading is 'Payment Receiving Preferences' with a link 'Back to Profile Summary'.

Note: If you are using IPN, you must update your scripts to handle payments in currencies other than U.S. Dollars. [Learn More](#)

Block payments sent to me in a currency I do not hold:

- ☐ Yes
- ☒ No, accept them and convert them to Euros
- ☐ Ask Me

Optional setting - for automated payment processing you should avoid the Ask Me setting. Also, for easier accounting it's better to have all payments made in your preferred currency.

Block accidental payments:

You may prevent accidental payments by blocking duplicate invoice IDs

- ☒ Yes, block multiple payments per invoice ID
- ☐ No, allow multiple payments per invoice ID

Good setting to avoid duplicate payments made by accident

Block payments from users who:

- ☒ Initiate payments from the Pay Anyone subtab of the Send Money tab (If checked, you may enter an Alternate Payment URL for your buyers.)

Alternate Payment URL: ?

(optional)

Good setting to make sure that this account only is used with CB Paid Subscriptions system.

Block the following payments:

- ☒ Pay with eCheck for website and Smart Logo payments, or German bank transfer for all website payments except eBay. **NOTE:** You may not block eCheck payments on eBay.

Optional setting - eCheck takes a week to clear and causes problems because subscribers expect to gain instant access to content but don't.

Display "Add Instructions to Seller" text input field:

- ☒ Yes
- ☐ No

The Credit Card Statement Name is the name that will appear on your customers' credit card statements.

The name can be 11 alpha-numeric characters in length, including spaces.

For some payments, the name can be extended to 19 alpha-numeric characters in length, including spaces. [Learn More](#)

Credit Card Statement Name: (11 Character Maximum)

Extended Credit Card Statement Name: (19 Character Maximum)

Save Cancel

Figure 342: PayPal Payment Receiving Preferences

Your Instant Payment Notifications Preferences area of your PayPal Business Account also contains some relevant settings that need to be properly configured in order for the **CBSubs™** setup to work properly with your PayPal Business Account.

As illustrated in our example in **Figure 343**, the 'Instant Payment Notification (IPIN)' setting must be set to 'On' and the 'Instant Payment Notification (IPIN) URL' settings should be populated with your home page website (where **CBSubs™** is working) internet Address (e.g., <http://www.mypage.com>).

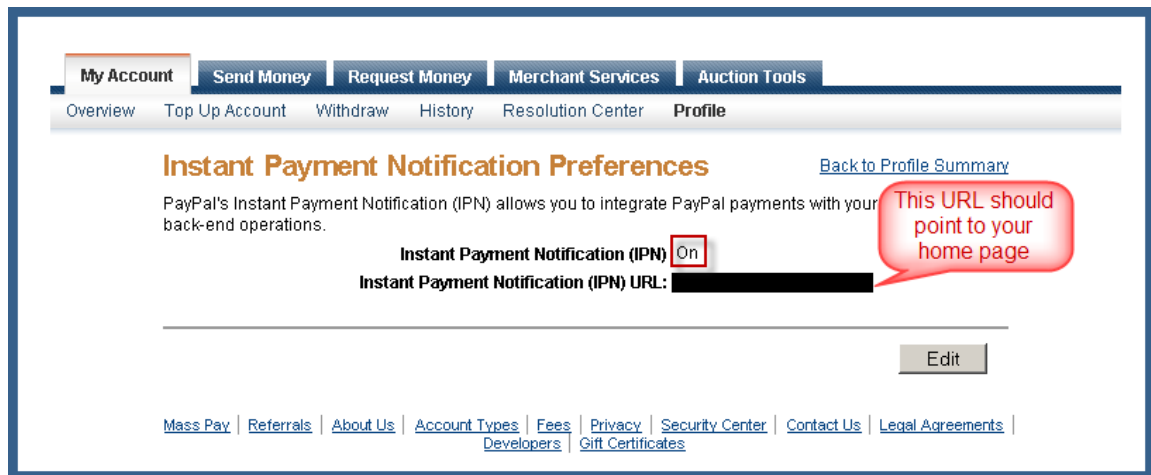


Figure 343: PayPal Instant Payment Notification Preferences

In your 'Website Payment Preferences' area of your PayPal Business Account a number of settings must be properly configured in order for your PayPal Business Account to collaborate with your **CBSubs™** powered environment.

As illustrated in **Figure 344** in our example setup the following configuration has been made:

- Auto Return has been set to 'On'
- Return URL has been set to our home page (where we have installed the **CBSubs™** system). You can also leave this blank if your PayPal account is being used in multiple sites. **CBSubs™** transmits the return URL to PayPal according to PayPal API.
- Payment Data Transfer (Optional) has been set to 'On' and we also have our Identity token generated (will be needed when configuring our PayPal Payment Gateway in our **CBSubs™** backend).
- Block Non-encrypted Website Payment has been set to 'On'. This setting forces us to configure our **CBSubs™** PayPal Payment Gateway to work with https protocol (discussed in appropriate section in document).
- Contact Telephone is set to 'Off'
- Support giropay and bank transfer payments is set to 'Off'

These settings should be appropriately configured for your specific business establishment and environment. Ask PayPal for assistance or find professional help if you have questions.

My Account

Send Money

Request Money

Merchant Services

Auction Tools

OverviewTop Up AccountWithdrawHistoryResolution CenterProfile

Website Payment Preferences

Back to Profile Summary

Auto Return for Website Payments

Auto Return for Website Payments brings your buyers back to your website immediately after payment completion. Auto Return applies to PayPal Website Payments, including Buy Now, Donations, Subscriptions, and Shopping Cart. [Learn More](#)

Auto Return: ☒ On
☐ Off

Return URL: Enter the URL that will be used to redirect your customers upon payment completion. This URL must meet the guidelines detailed below. [Learn More](#)

Return URL:

Return URL Requirements: The following items are required in order to set up Auto Return.

- Per the user agreement, you must provide verbiage on the page displayed by the Return URL that will help the buyer understand that the payment has been made and that the transaction has been completed.
- You must provide verbiage on the page displayed by the Return URL that explains that payment transaction details will be emailed to the buyer.
- Example: Thank you for your payment. Your transaction has been completed, and a receipt for your purchase has been emailed to you. You may log into your account at www.paypal.com/row to view details of this transaction.

Payment Data Transfer (optional)

Payment Data Transfer allows you to receive notification of successful payments as they are made. The use of Payment Data Transfer depends on your [system configuration](#) and your Return URL. Please note that in order to use Payment Data Transfer, you **must** turn on Auto Return.

Payment Data Transfer: ☒ On
☐ Off

Identity Token:

Encrypted Website Payments

Using encryption enhances the security of website payments by decreasing the possibility that a 3rd party could manipulate the data in your button code. If you plan on only using encrypted buttons you can block payments from non-encrypted ones.

[Learn more about Encrypted Website Payments](#)

Note: If you enable Encrypted Website Payments, all of your Buy Now, Donations, and Subscriptions buttons **must** be encrypted via one of the following methods:

- Using the [Button Factory](#) with the security settings enabled.
- Using your own code, you encrypt all website payments before sending them to PayPal.

By enabling this feature, any Buy Now, Donation, or Subscription button that is not encrypted will be rejected by PayPal.

Block Non-encrypted Website Payment: ☒ On
☐ Off

PayPal Account Optional

When this feature is turned on, your customers will go through an optimized checkout experience. This feature is available for Buy Now, Donations, and Shopping Cart buttons, but not for Subscription buttons. [Learn More](#)

PayPal Account Optional: ☒ On
☐ Off

Contact Telephone Number

When you activate this option, your customers will be asked to include a Contact Telephone Number with their payment information. [Learn More](#)

Note: Selecting **On (Required Field)** could have a negative effect on buyer conversion.

Contact Telephone ☐ On (Optional Field)
☐ On (Required Field)
☒ Off (PayPal recommends this option)

Express Checkout Settings

With this setting you determine if you technically support the German funding methods giropay and bank transfer in your Express Checkout implementation.

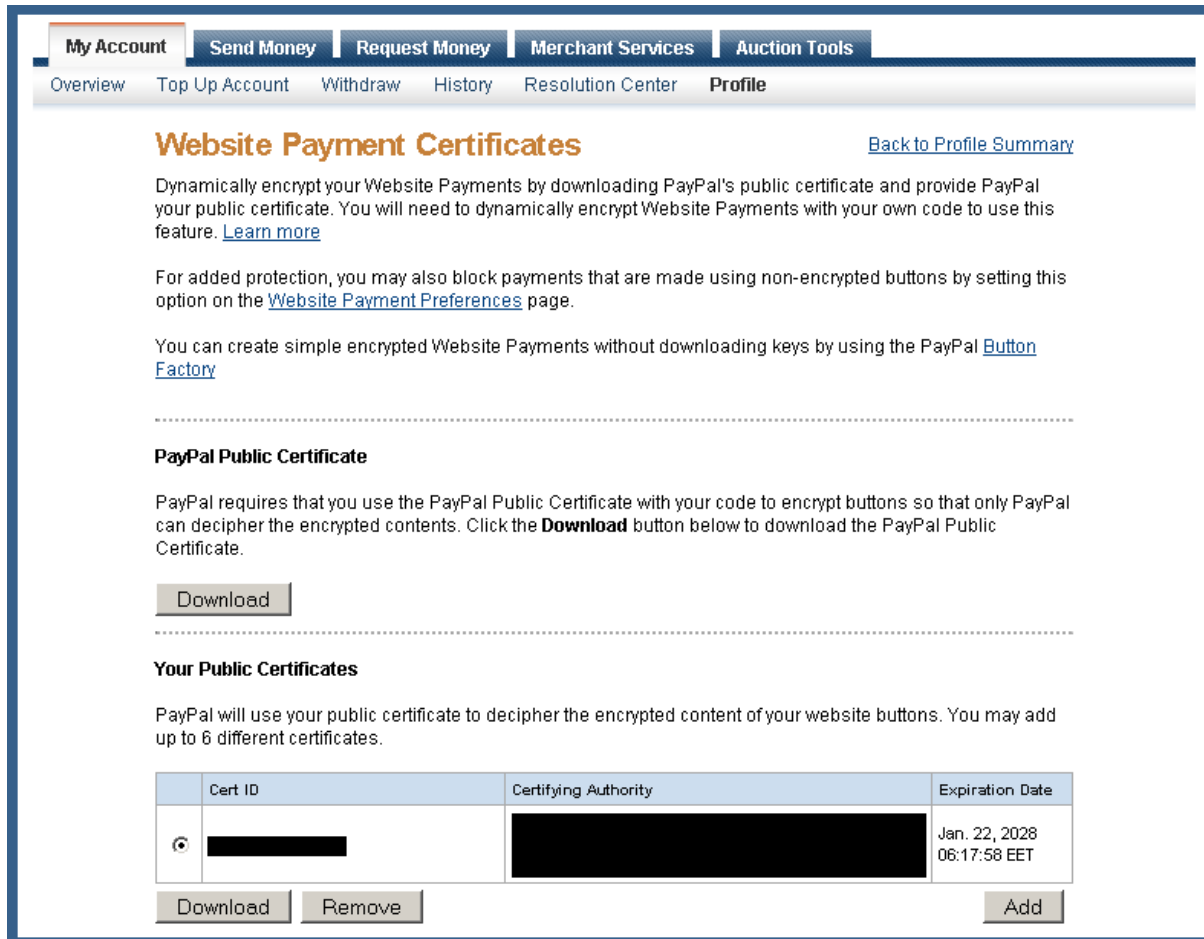
Support giropay and bank transfer payments: ☐ Yes
☒ No

Save

Cancel

Figure 344: PayPal Website Payment Preferences

The Encrypted Payment Settings of your PayPal Business Account area (see **Figure 341**) will take you to your 'Website Payment Certificates' page as illustrated in **Figure 345**.



Website Payment Certificates [Back to Profile Summary](#)

Dynamically encrypt your Website Payments by downloading PayPal's public certificate and provide PayPal your public certificate. You will need to dynamically encrypt Website Payments with your own code to use this feature. [Learn more](#)

For added protection, you may also block payments that are made using non-encrypted buttons by setting this option on the [Website Payment Preferences](#) page.

You can create simple encrypted Website Payments without downloading keys by using the PayPal [Button Factory](#)


PayPal Public Certificate

PayPal requires that you use the PayPal Public Certificate with your code to encrypt buttons so that only PayPal can decipher the encrypted contents. Click the **Download** button below to download the PayPal Public Certificate.

[Download](#)

Your Public Certificates

PayPal will use your public certificate to decipher the encrypted content of your website buttons. You may add up to 6 different certificates.

	Cert ID	Certifying Authority	Expiration Date
	[REDACTED]	[REDACTED]	Jan. 22, 2028 06:17:58 EET

[Download](#) [Remove](#) [Add](#)

Figure 345: PayPal Website Payment Certificates

On this PayPal page, you will be able to generate and download the appropriate certificates needed to properly configure your **CBSubs™** powered website to securely interact with your PayPal Business account. You will also be able to use this page to upload your certificate (created by using **OPENSSL** on your local environment) to your PayPal Business account.

18 Configuring your Ogone Account

The Ogone Payment Services organization can be reached at www.ogone.com and it offers a variety of competitively priced online payment services that integrate nicely with **CBSubs™ 1.1** and above. The services integrate directly with many countries and major banking institutions through the world.

The Ogone website allows you to request a FREE test account that you can use to experience the very powerful payment options offered by this financial organization. The Ogone test account can be requested online by visiting the Ogone home page (www.ogone.com) and clicking on the “**Create your FREE test account**” button as illustrated in **Figure 346**.

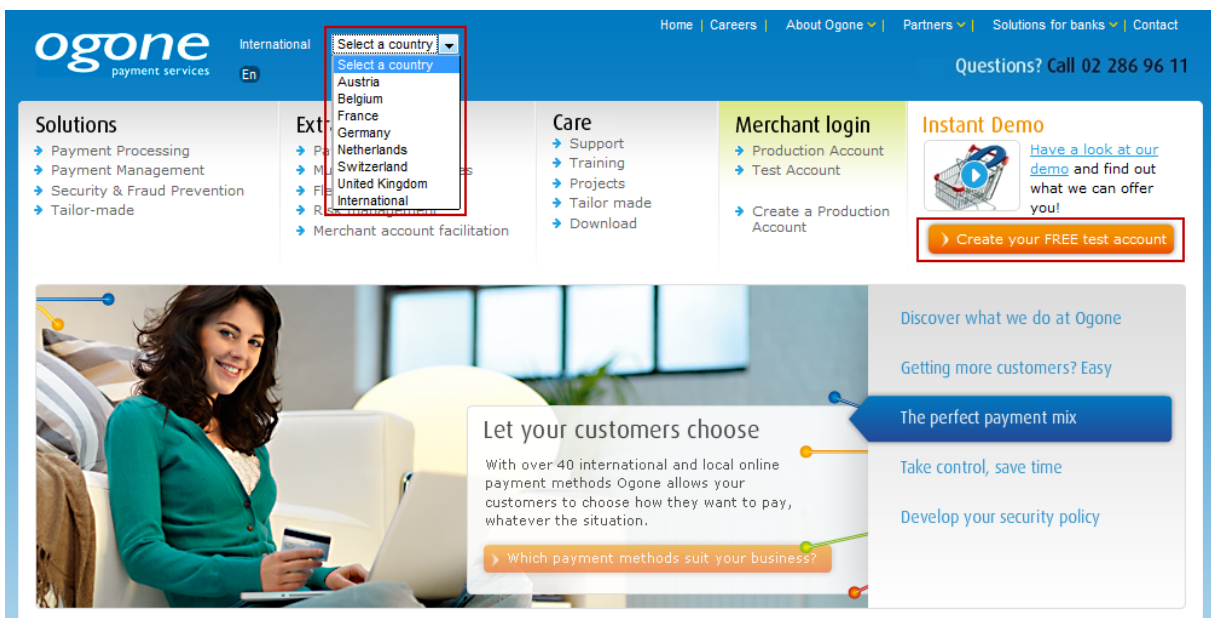


Figure 346: Creating new Ogone Test Account

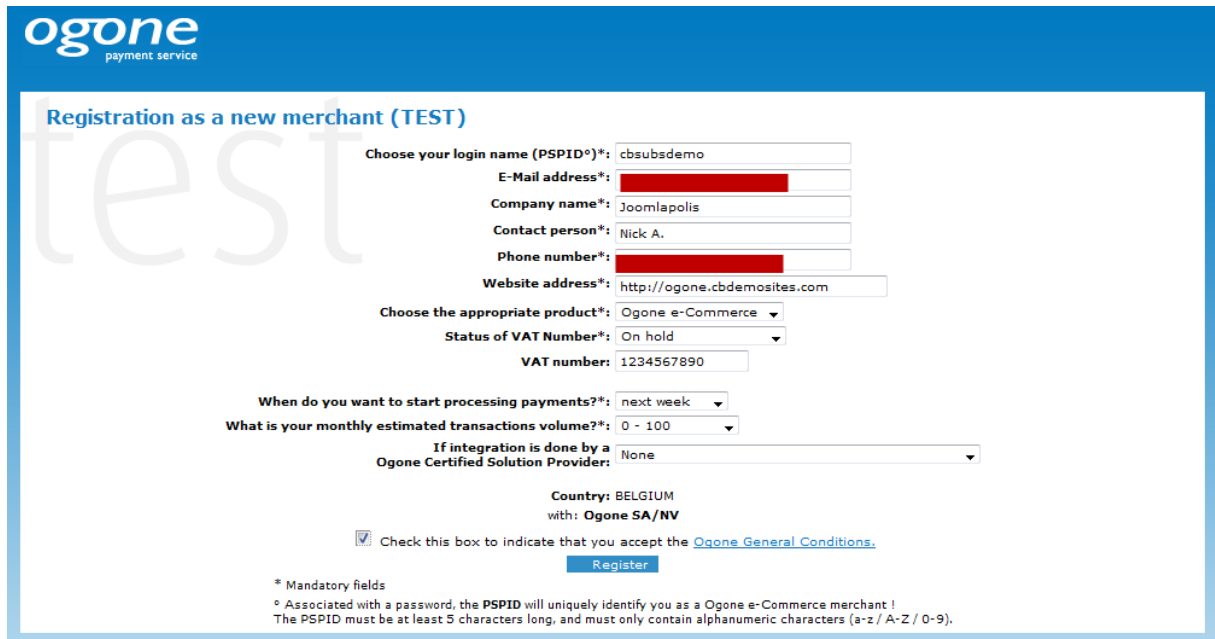
You can also preselect the country base of your online business from the drop down field on the home page before you start the test account creation process. However, you can also modify this later on once your test account has been created.

The account creation button will take you to the Ogone test account registration form as illustrated in **Figure 347**. This form has a number of fields (most of them mandatory) that need to be populated and submitted. Most of these are straightforward in understanding, but we will quickly review their meaning:

- Choose your login name (PSPID):
The Ogone system refers to your access login/username as a PSPID. You can select your PSPID for your test account here. E.g., cbsubsdemo.
- Email address:
Enter the email address you would like Ogone to use when communicating anything related with the test account.
- Company name:
Enter that name of your company.
- Phone number:
Enter your international phone number should Ogone personnel need to contact you (this is more meaningful when you are ready to convert your test account to a production account).
- Website address:
Enter your website address of the site that will be interfacing with the Ogone payment services – the one you have installed (or will install) **CBSubs™ 4.1** (or better) on.
- Choose the appropriate product:
This drop-down select field should be populated with the “Ogone e-Commerce” value in order to be able to use online payments with **CBSubs™**.
- Status of VAT Number:
This setting instructs Ogone regarding how VAT should be handled on this test account. There are three possible settings: ‘VAT subjected’, ‘Not subjected to VAT’, ‘On hold’. You can modify this later once your test account has been activated.
- VAT number:
You should populate the VAT number you will be using for your online business. You can always modify this later once your test account has been activated.
- When do you want to start processing payments:
Specify when you think that you would want to start live processing.
- What is your monthly estimated transaction volume:
You can provide an estimated transaction volume for your business.

- If integration is done by a Ogone Certified Solution Provider:
You should select the service provider you are using.

Once again do not worry about the “Belgium” country setting that might appear ‘hardcoded’ on the test account registration page – you can change this later once your account has been activated.



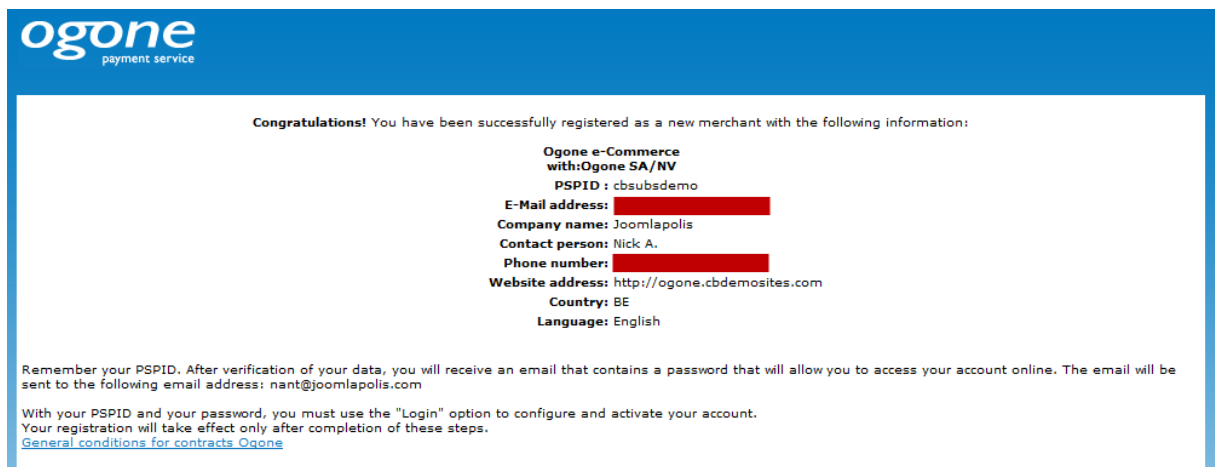
The image shows the 'Registration as a new merchant (TEST)' form on the Ogone payment service website. The form is titled 'Registration as a new merchant (TEST)' and includes a large 'test' watermark. It contains several input fields and dropdown menus for merchant registration details. The fields are as follows:

- Choose your login name (PSPID)*: cbsubsdemo
- E-Mail address*: [Redacted]
- Company name*: JoomlaLapolis
- Contact person*: Nick A.
- Phone number*: [Redacted]
- Website address*: http://ogone.cbemosites.com
- Choose the appropriate product*: Ogone e-Commerce
- Status of VAT Number*: On hold
- VAT number: 1234567890
- When do you want to start processing payments?*: next week
- What is your monthly estimated transactions volume?*: 0 - 100
- If integration is done by a Ogone Certified Solution Provider: None
- Country: BELGIUM
- with: Ogone SA/NV
- ☒ Check this box to indicate that you accept the [Ogone General Conditions](#).
-

Below the form, there is a note: '* Mandatory fields' and a disclaimer: '° Associated with a password, the PSPID will uniquely identify you as a Ogone e-Commerce merchant ! The PSPID must be at least 5 characters long, and must only contain alphanumeric characters (a-z / A-Z / 0-9)'.

Figure 347: Ogone Test account registration form

Once you submit the populated form of **Figure 347**, the Ogone backend system will take you to the form completion page illustrated in Figure 348.



The image shows the 'Successful Ogone test account application page' on the Ogone payment service website. The page has a blue header with the 'ogone payment service' logo. The main content area is white and contains the following information:

Congratulations! You have been successfully registered as a new merchant with the following information:

- Ogone e-Commerce with: Ogone SA/NV
- PSPID : cbsubsdemo
- E-Mail address: [Redacted]
- Company name: JoomlaLapolis
- Contact person: Nick A.
- Phone number: [Redacted]
- Website address: http://ogone.cbemosites.com
- Country: BE
- Language: English

Below this information, there is a note: 'Remember your PSPID. After verification of your data, you will receive an email that contains a password that will allow you to access your account online. The email will be sent to the following email address: nant@joomlapolis.com'.

With your PSPID and your password, you must use the "Login" option to configure and activate your account. Your registration will take effect only after completion of these steps.

[General conditions for contracts Ogone](#)

Figure 348: Successful Ogone test account application page

After successful completion and (hopefully) within minutes you will receive a confirmation email (sent to the email address you specified on the form) with all you login specifics and important support information. Please study this email as it will help you initiate any troubleshooting should you need to. Also, please note that the initial password (to match your PSPID) has not been included in this first email from Ogone. A second email will follow shortly after (might take more time than the first emailing did), so be patient.

Once you have your initial password at hand you can access the Ogone login page by visiting the following URL: https://secure.ogone.com/ncol/test/admin_ogone.asp . The Ogone test account login page is illustrated in **Figure 349**.

Figure 349: Ogone test account login page

Once you have populated the login form with your PSPID (username) and the initial password that you received in the second emailing from Ogone, you will be taken to your “Ogone server administration page” as illustrated in **Figure 350**.

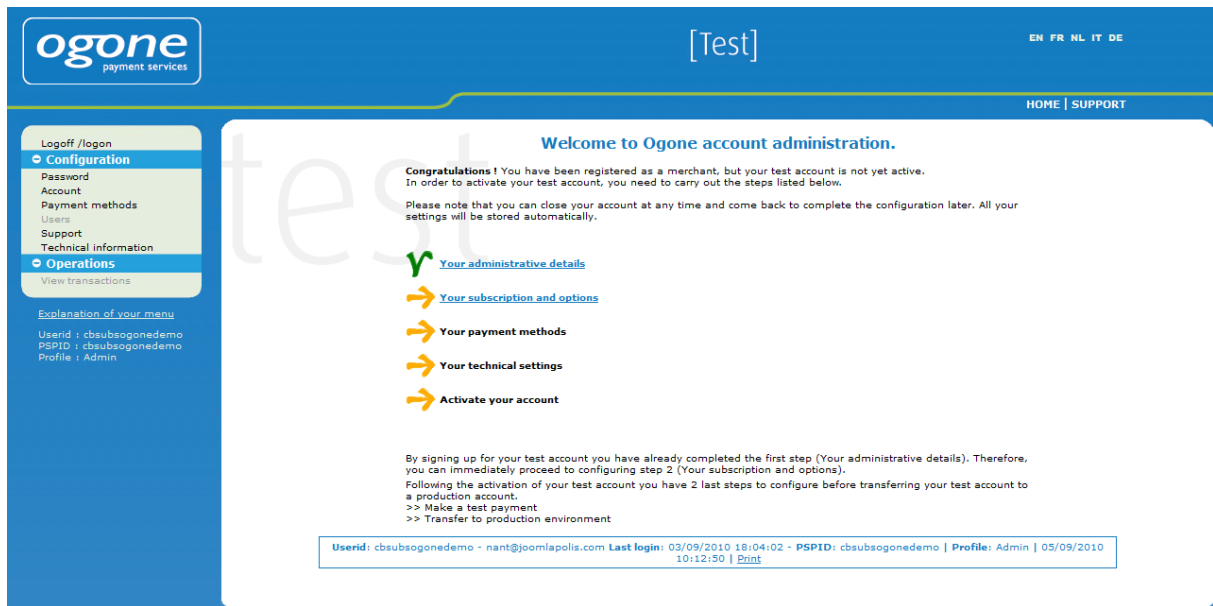


Figure 350: Ogone server administration page

One of the first areas you should get familiar with is the Support → Documentation page of your Ogone administrative area. This is illustrated on **Figure 351**.

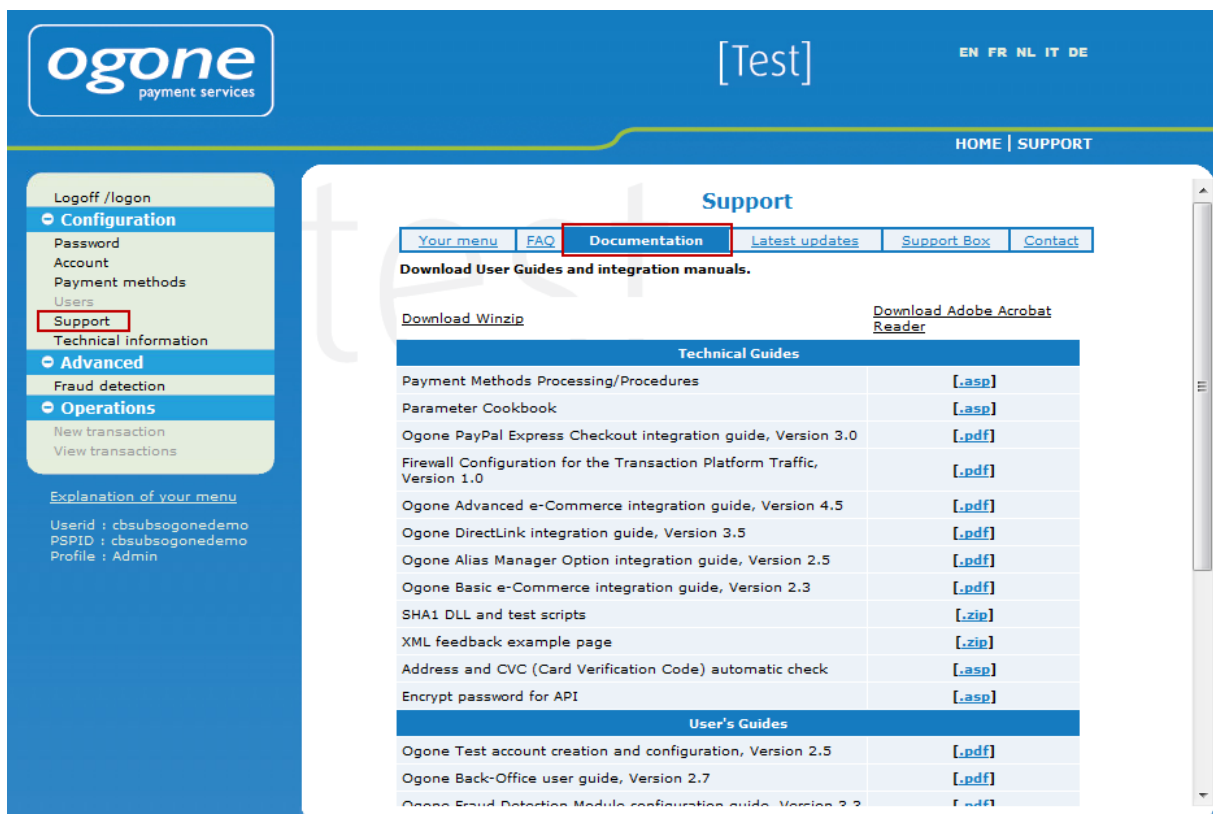


Figure 351: Ogone Support Documentation area

There is plenty of well documented information available and you should download and study everything in order to take full advantage of the many available services that will help you manage your online business.

As you can see by looking closer at your Ogone Server Administration page illustrated in **Figure 350**, you need to configure various extra settings (in the form of steps) before your test account can actively accept test payments. You have already completed step 1 (Your administrative details) during the registration form process. However, you can revisit this step and make any modifications by clicking on the 'Your administrative details' link of **Figure 350** in order to reach the Step 1 of 2 Administrative details form page as illustrated in **Figure 352**.

Your administrative details
Ogone e-Commerce
with : Ogone SA/NV

Step 1 of 2

The company name is the official company name used in communication with acquirers, banks and Ogone.

The commercial company name will be used on the payment pages and in the e-mail communication towards your customers, if activated on the technical information page. (If this field is empty the company name will be used.)

More email addresses can be set up in the Technical Info page of your account.
[Go to the Technical information](#)

You are now on step 1/2 of 'Your administrative details'

[Go back to 'Homepage'](#)

[Confirm and go back to 'Homepage'](#)

Confirm and go to 'Your billing information'

Figure 352: Step 1 of Administrative details modification page

You can modify any information on this step 1 page and then get to step 2 which contains your billing information by clicking on the **Confirm and go to "Your billing information"** button shown in the lower right corner of **Figure 352**. The step 2 page is illustrated in **Figure 353**.

Step 2 of 2

Your billing information

As this is a test account, no billing will be done!
Therefore, it's not necessary to fill in the fields below to be able to use your test account.

Your billing information:

Company name: CBSubs Demo Company

Name: Nick A.

Title / Department: -

Address: -

ZIP(postcode): -

City: -

Country: GREECE

VAT number: GR1234567890

Status of VAT Number: VAT subjected

RCS Code: -

Charging method: No billing done in TEST

☐ **Credit card**

Card holder's name: -

Card number: -

Expiry date (mm/yyyy): 09 / 10

☐ **Direct debit**

Bank Account: -

Name of the bank: ABN AMRO BANK

☒ **NOT BILLED**

You are now on step 2/2 of 'Your administrative details'

[Go back to 'Your administrative details'](#)

[Confirm and go back to 'Homepage'](#)

Confirm and go to 'Your subscription and options'

Figure 353: Step 2 of administrative details modification page

The 'Your billing information' portion (step 2) of the administrative details can be left empty when you are in test mode (as mentioned in the red framed area of the webpage). The information here is needed to instruct Ogone about the method that it should use to bill its services.

Once you have populated (or left as is in case of test account) the 'Your billing information' page (which remember is Step 2 of the Your administrative details page), you can click on the **Confirm and go to "Your subscription and options"** button shown in the lower right corner of **Figure 353**. This will take you to Step 1 of your subscription options modification page illustrated in **Figure 354**. Please note that you will also be taken to this page if you click on the 'Your subscriptions and options' link on **Figure 350**.

The '**Your subscription options**' shown in Step 1 (**Figure 354**) allow you to select which type of subscription you will follow. Ogone has 4 such options that you can select from in order to fine-tune your payment fees according to anticipated volumes. While in test mode there is no need to concern yourself as you can see that all amounts are zero.

Step 1 of 2

Your subscription

☒ Adventure

Activation	Monthly fee	Transaction rate	Transaction fixed cost	Free transactions
0 EUR	0 EUR	0 %	0 EUR	0

☐ HighFlyer

Activation	Monthly fee	Transaction rate	Transaction fixed cost	Free transactions
0 EUR	0 EUR	0 %	0 EUR	0

☐ Horizon

Activation	Monthly fee	Transaction rate	Transaction fixed cost	Free transactions
0 EUR	0 EUR	0 %	0 EUR	0

☐ Sky

Activation	Monthly fee	Transaction rate	Transaction fixed cost	Free transactions
0 EUR	0 EUR	0 %	0 EUR	0

You are now on step 1/2 of 'Your subscription and options'

[Go back to
'Your billing information'](#)

Confirm and go to
'Your options'

Figure 354: Step 1 of subscription options page

Once you have selected with subscription option you prefer, you can get to step 2 of your subscription options by clicking on the **Confirm and go to "Your options"** button shown in the lower right corner of **Figure 354**. This will take you to step 2 of your subscription and options page as illustrated in **Figure 355**.

This area will present various extra services and options that can be activated on your account in order to upgrade your basic services. You should study these options when you are ready to go live with your production account. There are many available options that will help you manage your business. There is no need to concern yourself with these settings and options while in test account mode.

Step 2 of 2

Your options

You have chosen the Ogone Adventure solution. Click [here](#) to see your default account settings.

To enlarge the possibilities of your account, you can activate the following options:

Recommended options:

Logo hosting for static template page (20 KB) [Activate](#)

Secure hosting of a logo (max 20 K) to be displayed at the top of the payment pages

Activation	Monthly fee	Transaction/Unit cost
0 EUR	0 EUR	0 EUR

Available options:

Id	Option	Activation	Monthly fee	Transaction/Unit cost	Status		
RAS	e-Terminal	0 EUR	0 EUR	0 EUR	Active	Info	Deactivate
MAS	Merchant Assistant Toolbox	0 EUR	0 EUR	0 EUR	Available	Info	Activate
INV	Invoice look	0 EUR	0 EUR	0 EUR	Available	Info	Activate
CAP	Fraud detection module (FDM)	0 EUR	0 EUR	0 EUR	Active	Info	Deactivate
						Configuration	
IMG4	Images hosting up to 100 KB	0 EUR	0 EUR	0 EUR	Available	Info	Activate
IMG3	Images hosting up to 50 KB	0 EUR	0 EUR	0 EUR	Available	Info	Activate
IMG2	Images hosting up to	0 EUR	0 EUR	0 EUR	Available	Info	Activate

Figure 355: Step 2 of your options modification page

You can complete step 2 of your options page by clicking on the lower right [Confirm](#) and go to “[Your payment methods](#)” button (not illustrated on **Figure 355** – you will need to scroll down on your actual page to see this button). Once you click on this button you will be taken to the ‘Your payments’ page illustrated in **Figure 356**.

On this page, you must select at least one payment method in order to be able to actually test payments online. On **Figure 356** we have configured 3 credit cards as active payment methods – Visa, MasterCard and Diners.

When you select a new payment to activate you will be taken to a supplementary page where you are asked to provide more specific information regarding your acquiring company. This information may be skipped while in test mode.

Your payment methods

Selected payment methods

CreditCard	Status	Acquirer	Filter		
Processing: online Payment procedure: Automatic authorisation and payment (data capture) on request Warning: to generate payments, the authorizations will have to be confirmed manually. Edit					
Diners Club	Active	Test Diners Club acquirer	Edit	Edit filter	Acquirer Info
MasterCard	Active	Test MasterCard acquirer	Edit	Edit filter	Acquirer Info
VISA	Active	Test VISA acquirer	Edit	Edit filter	Acquirer Info

WebBanking	Status	Acquirer	Filter	
PAYPAL	Not active	PAYPAL	Edit	Edit filter

Choose new payment methods

Country :

Bank transfer	
Bank transfer	Add

CreditCard	
AIRPLUS	Add
American Express	Add
Billy	Add
JCB	Add
Maestro	Add
Solo	Add
MaestroUK	Add
UATP	Add

[Go back to 'Your subscription and options'](#)
[Confirm and go back to 'Homepage'](#)
[Confirm and go to 'Global transaction parameters'](#)

Figure 356: Your Ogone payment methods

Once you have completed your payment options page you can click on the lower right **Confirm and go to “Global transaction parameters”** button to continue the process with the ‘Your technical settings’ page illustrated in **Figure 357**.

Your technical settings

Subscription Type

Subscription: Ogone e-Commerce Adventure
 ISP: OIT
 Subsidiary: Belgium

Active transaction submission modes

eCommerce
 eTerminal
 Direct Maintenance
 Direct Query

Other transaction submission modes available in your account

DirectLink

Global transaction parameters	Global security parameters	Payment Page layout	Data and origin verification	Transaction feedback	Transaction e-mails	Test Info
<p>Default operation code</p> <p> <input type="radio"/> Sale <input checked="" type="radio"/> Authorisation</p> <p>With Ogone e-Terminal, the default operation code you configured above will be valid for all transactions.</p> <p>With Ogone e-Commerce, Ogone Batch, you can overwrite the default operation code configured above by sending along an operation code in the transaction details.</p> <p>Default data capture (payment) procedure</p> <p> The default data capture (payment) procedure is only applicable if you have 'Authorisation' as the default operation code for your account or you included the 'Authorisation' operation code in the transaction details.</p>						

Figure 357: Ogone technical settings page

These tab pages have various tooltip icons  that can be clicked upon to produce popup windows that contain extra information regarding the specific parameter.

Please note that you can also reach the '**Your technical settings**' page by selecting the '**Technical information**' link from the left column of your Ogone server administration page illustrated in **Figure 350**.

As you can see from **Figure 357**, the Ogone technical settings page contains 7 (seven) tabs, each one of which has configuration settings that are used to configure your Ogone services. We will provide some default settings that can be used to quickly configure our Ogone account technical settings in order to start real **CBSubs™** testing with our Ogone test account.

The first technical settings tab is the 'Global transaction parameters' tab that contains the following parameters:

- Default operation code
This radio field setting is by default set to the 'Authorization' setting, but as **CBSubs™** is implemented to use override mode there is no need to bother with this setting.
- Default data capture (payment) procedure
The default setting of 'Data capture by the merchant (manual or automatic)' can be left as is to work with **CBSubs™**.
- Payment retry
The default value of '10' can be left as is for our **CBSubs™** tests.
- Processing for individual transactions
This value can be left as 'Online but switch to offline when the online acquiring system is unavailable' in our **CBSubs™** tests.
- Default ECI value
This value can be left as '7 – E-commerce with SSL encryption' in the drop-down field.

These values are shown in **Figure 358**.

Default operation code



- ☐ Sale
- ☒ Authorisation

With Ogone e-Terminal, the default operation code you configured above will be valid for all transactions.

With Ogone e-Commerce, Ogone Batch, you can overwrite the default operation code configured above by sending along an operation code in the transaction details.

Default data capture (payment) procedure



The default data capture (payment) procedure is only applicable if you have 'Authorisation' as the default operation code for your account or you included the 'Authorisation' operation code in the transaction details.

- ☒ Data capture by the merchant (manual or automatic).
- ☐ Automatic data capture by our system at the end of the day.
- ☐ Automatic data capture by our system after days.

Payment retry

The number of times you allow a customer to try the payment on the secure Ogone payment pages (with the same or different payment details) within a single order:

Processing for individual transactions



- ☐ Always online (Immediate).
- ☒ Online but switch to offline in intervals when the online acquiring system is unavailable.
- ☐ Always offline (Scheduled).

Default ECI value



It is vital that the ECI is defined in accordance with your acquirer's specifications. If an incorrect ECI is sent, it could infringe the rules set out in your acquiring agreement.

With Ogone e-Commerce, the ECI will be determined dynamically depending on the transaction context.

With Ogone e-Terminal, Ogone Batch, you can overwrite the default ECI value configured above by submitting another ECI value in the transaction details.

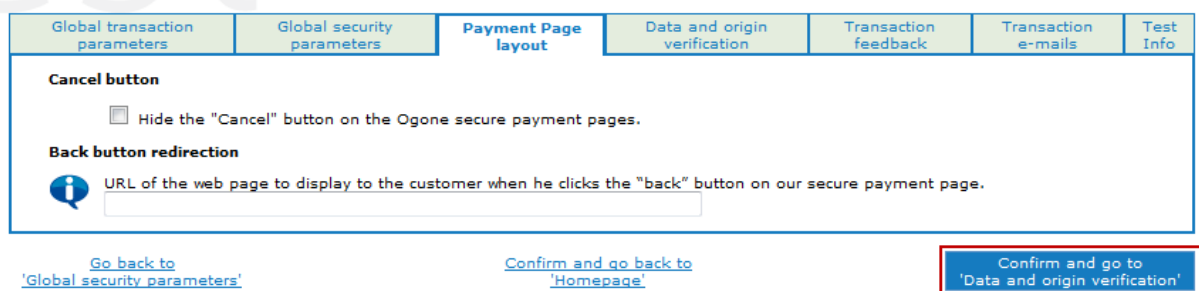
Figure 358: Technical information Global transaction parameters tab

Once these values are populated (or hopefully left as they were), you can click on the **Confirm and go to "Data and origin verification"** button to proceed with the next tab shown in **Figure 359**.

Global transaction parameters	Global security parameters	Payment Page layout	Data and origin verification	Transaction feedback	Transaction e-mails	Test Info
Hashing method This configuration affects all signature checks of which the pass phrases are configured under "Data and origin verification" and "Transaction feedback". <div> Hash algorithm: <input checked="" type="radio"/> SHA-1 <input type="radio"/> SHA-256 <input type="radio"/> SHA-512</div> <div> Character encoding: <input checked="" type="radio"/> Use the character encoding expected with the initial transaction request (depending on the URL called) <input type="radio"/> ISO-8859-1 <input type="radio"/> UTF-8</div>						
Go back to 'Global transaction parameters'		Confirm and go back to 'Homepage'		Confirm and go to 'Payment Page layout'		

Figure 359: Technical information Global security parameter tab

The '**Global security parameters**' tab contains 2 radio select parameters used to describe the algorithm and encoding to be used by Ogone/**CBSubs**™ integration. The default settings that appear on **Figure 359** will serve just fine. We can of course select any of the three available Hash algorithms as long as we match whatever we select here with the relevant **CBSubs**™ gateway settings parameter. Please keep in mind that the higher the algorithm SHA-1 → SHA-256 → SHA-512 the better the security but also the more processing power involved. We can proceed with the next tab by clicking on the **Confirm and go to "Payment Page layout"** button in the lower right corner as illustrated in **Figure 359**.




Global transaction parameters	Global security parameters	Payment Page layout	Data and origin verification	Transaction feedback	Transaction e-mails	Test Info
<p>Cancel button</p> <p><input type="checkbox"/> Hide the "Cancel" button on the Ogone secure payment pages.</p> <p>Back button redirection</p> <p> URL of the web page to display to the customer when he clicks the "back" button on our secure payment page.</p> <p><input type="text"/></p>						
<p>Go back to 'Global security parameters'</p>		<p>Confirm and go back to 'Homepage'</p>		<p>Confirm and go to 'Data and origin verification'</p>		

Figure 360: Technical information Payment Page layout tab

This will take us to the '**Payment Page layout**' tab as illustrated in **Figure 360**. This tab contains 2 parameters – a checkbox parameter and a URL field parameter. These settings should left as illustrated in the figure – first parameter unchecked and URL parameter empty.

Once finished with the '**Payment Page layout**' tab we should click on the 'Confirm and go to "Data and origin verification" button' shown in **Figure 360** to go to the 'Data and origin verification' tab illustrated in **Figure 361**.





Global transaction parameters	Global security parameters	Payment Page layout	Data and origin verification	Transaction feedback	Transaction e-mails	Test Info
<p>Checks for e-Commerce</p> <p> URL of the merchant page containing the payment form that will call the page:orderstandard.asp</p> <p><input type="text"/></p> <p>You may enter several URL, separated by ";".</p> <p> SHA-IN Pass phrase</p> <p>Be aware that the SHA-1-IN Signature has to be filled in, because of the configuration you entered at the STEP 1.</p> <p><input type="text"/></p> <p>Checks for Ogone e-Terminal</p> <p>When using these transaction submission modes, you have to log into the back-office beforehand.</p> <p>Checks for Ogone DirectLink</p> <p>When using these transaction submission modes, login details have to be transmitted in the HTTP parameters.</p> <p> IP address of the server calling the APIs used for any automatic or direct processing.</p> <p><input type="text"/></p> <p>You may enter several IP addresses, separated by ";"</p> <p> SHA-IN Pass phrase</p> <p><input type="text"/></p> <p><input type="button" value="Visible"/></p> <p>CBSubs does not currently support the Ogone DirectLink service, so these settings can be ignored.</p>						
<p>Go back to 'Payment Page layout'</p>		<p>Confirm and go back to 'Homepage'</p>		<p>Confirm and go to 'Transaction feedback'</p>		

Figure 361: Technical information Data and origin verification tab

The '**Data and origin verification**' tab contains various parameters for e-Commerce and Ogone DirectLink services. Since **CBSubs™** does not currently support the Ogone DirectLink service we can ignore the relevant settings and focus on the Checks for e-Commerce parameters show in **Figure 361**.

The first parameter: "URL of the merchant page containing the payment form ..." should be populated with the domain name of our website. If the website is located at domain: mydomain.com, then this field should be populated with the following value:

`http://mydomain.com;http://www.mydomain.com;https://mydomain.com;https://www.mydomain.com`

The next parameter: "**SHA-IN Pass phrase**" should be populated with a password/pass phrase with a minimum of 16 characters, containing at least 4 different characters, at least one letter (a-z) and at least one number (0-9) or symbol (&,@,#,!,...). The same value entered here must be pasted in the relevant **CBSubs™** Ogone gateway parameter.

Once finished with these settings you can click on the **Confirm and go to “Transaction feedback”** button’ located in the lower right corner as illustrated in **Figure 361**. This will take us to the **‘Transaction feedback’** tab.

The first set of parameters in the **‘Transaction feedback’** tab can be ignored since **CBSubs™** supports transaction details in its URLs as illustrated in **Figure 362**.

e-Commerce

HTTP redirection in the browser

URL of the web page to be displayed to the customer after the payment process:

Accepturl: displayed when the payment has been authorized, stored, accepted or is waiting to be accepted.

Declineurl: displayed when the acquirer declines the authorization more than the maximum permissible number of times (as defined in the payment retry section of the Global transaction parameters tab).

Exceptionurl: displayed when the payment result is uncertain.

Cancelurl: displayed when the customer cancels the payment.

You can overwrite the default redirection URLs configured above by sending along redirection URLs in the transaction details.

Figure 362: Transaction feedback HTTP redirection in browser settings

The next parameter on the **‘Transaction feedback’** tab is the checkbox field titled: **‘I want to receive transaction feedback parameters on the redirection URLs’**, which should be checked as illustrated in **Figure 363**.

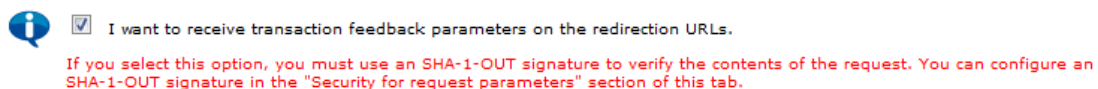


Figure 363: Transaction feedback receiving feedback parameters in URLs

The next also checkbox parameter is the **‘I want Ogone to display a short text to the customer on the secure payment page if a redirection to my website is detected immediately after the payment process’** which can be configured either way without affecting **CBSubs™**. The field is shown as enabled in **Figure 364**.

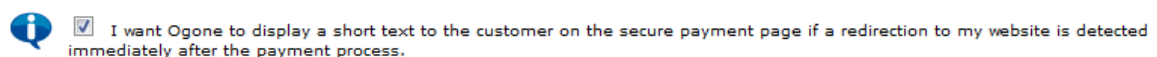



Figure 364: Transaction feedback display message before redirection

The next set of parameters on this tab is grouped under the heading '**Direct HTTP server-to-server request**' as illustrated in **Figure 365**.

Direct HTTP server-to-server request

 Timing of the request

☐ No request.

☒ Always deferred (not immediately after the payment).

☐ Always online (immediately after the payment to allow customisation of the response seen by the customer).

☐ Online but switch to a deferred request in intervals when the online requests fail.

URL of the merchant's post-payment page:

If the payment's status is "accepted", "on hold" or "uncertain".

If the payment's status is "cancelled by the client" or "too many rejections by the acquirer".

Request method

☒ POST

☐ GET

Figure 365: Transaction feedback Direct HTTP server-to-server request parameters

The first radio parameter needs to be set to '**Always deferred (not immediately after payment)**'. The following 2 URL text fields must be populated with the URL that is automatically generated by the **CBSubs™** backend during the **CBSubs™** Ogone gateway setup process as described in **chapter 7.4.5**. The URL generated must be a public address (using a localhost address will cause **CBSubs™** to generate a basket not found error). The final 'Request method' parameter can be set to either 'POST' or 'GET'. The 'POST' setting is recommended for security and privacy reasons as the 'GET' setting will cause transaction specific information to be included in the URL (and thus logged in web-server access logs – which of course may be useful for debugging purposes).

The next set of parameters on this tab is grouped under the heading '**Dynamic e-Commerce Parameters**' as illustrated in Figure 366. Just select them all to be sure as shown in figure.

Dynamic e-Commerce Parameters

This exchange box allows you to select or deselect the parameters you wish to receive as feedback for a transaction and move them from one box to another. Please note that NCERROR, PAYID, ORDERID, STATUS are default parameters and selected as such and cannot be removed.



Available		Selected
	> <	BIN BRAND CARDNO CN COMPLUS CURRENCY ED IP NCERROR ORDERID

Figure 366: Transaction feedback Dynamic e-Commerce Parameters


The final parameters in the '**Transaction feedback**' tab are illustrated in **Figure 367**. The first two checkbox parameters shown can be left unchecked. The SHA-OUT pass phrase needs to be set in a similar way (can and should be different value) as the SHA-IN PASS phrase parameter discussed earlier in the '**Data and origin verification**' tab description. The value specified here must be replicated in the **CBSubs™** relevant field during the **CBSubs™** Ogone gateway configuration described in **chapter 7.4.5**.

Finally, the '**Timing of the request**' parameter must be set to 'For each offline status change (payment, cancellation, ...)' and the 'URL on which the merchant wishes to get a deferred HTTP request ...' must be populated with the same **CBSubs™** generated URL taken from the **CBSubs™** Ogone gateway configuration area (this value was also used earlier in the 'Data and origin verification' tab).

General

-  ☐ I want Ogone to display a "processing" message to the customer during payment processing.
-  ☐ I want Ogone to re-launch the "end of transaction" (post-payment request/redirection) process if required.


All transaction submission modes**Security for request parameters**

 SHA-OUT Pass phrase

The use of a SHA-out signature is mandatory in this case.

.....

HTTP request for status changes

 Timing of the request

- ☐ No request.
- ☐ Only at the authorisation request of the order.
- ☒ For each offline status change (payment, cancellation...).

URL on which the merchant wishes to get a deferred HTTP request, should the status of a transaction change offline.

Figure 367: Transaction feedback final parameters

After saving our 'Transaction feedback' tab by clicking on the lower right button we are taken to the 'Transaction e-mails' tab illustrated in **Figure 368**.

Global transaction parameters	Global security parameters	Payment Page layout	Data and origin verification	Transaction feedback	Transaction e-mails	Test Info
<p>E-mails to the merchant</p> <p>E-mail address(es) for transaction-related e-mails:</p> <input type="text"/> <p>You may enter several e-mail addresses, separated by ";".</p> <p>Receive transaction confirmation e-mails:</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Yes, but only for e-Commerce transactions.</p> <p><input type="radio"/> Yes, for all transaction submission modes.</p> <p>i Receive e-mails in case of offline transaction status changes:</p> <p><input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes, but only at the authorisation request of the order.</p> <p><input type="radio"/> Yes, for each offline status change (payment, cancellation ...).</p> <p>E-mails to the customer</p> <p>i <input type="checkbox"/> I want Ogone to send a transaction confirmation e-mail to the customer.</p> <p>Go back to 'Transaction feedback'</p> <p>Confirm and go back to 'Homepage'</p> <p>Confirm and go to 'Test Info'</p>						

Figure 368: Transaction e-mails tab

This tab can be configured as illustrated in the figure. The first email address parameter is populated by default with the email address of the PSPID user account. We have also specified that the '**Receive transaction confirmation e-mails**' parameter be set to '**Yes, but only for e-Commerce transaction**'. The last parameters may be set either way. We can save these parameters again by clicking on the lower right button and at the same time we are taken to the '**Test Info**' tab illustrated in **Figure 369**.


Global transaction parameters	Global security parameters	Payment Page layout	Data and origin verification	Transaction feedback	Transaction e-mails	Test Info																		
Test Info  <input checked="" type="radio"/> I want to simulate transaction results based on the amount. <input type="radio"/> I want to simulate transaction results based on the card number.																								
<table border="1"> <thead> <tr> <th rowspan="2">TRANSACTION RESULT</th> <th colspan="2">BASED ON AMOUNT</th> <th rowspan="2">BASED ON CARD NUMBER</th> </tr> <tr> <th>Amount</th> <th>Amount × 100</th> </tr> </thead> <tbody> <tr> <td>Successful</td> <td>0 - 9000</td> <td>0 - 900000</td> <td>Any other card number</td> </tr> <tr> <td>Refused</td> <td>> 9000</td> <td>> 900000</td> <td>4111113333333333</td> </tr> <tr> <td>Uncertain</td> <td>9999</td> <td>999900</td> <td>4111116666666666</td> </tr> </tbody> </table>							TRANSACTION RESULT	BASED ON AMOUNT		BASED ON CARD NUMBER	Amount	Amount × 100	Successful	0 - 9000	0 - 900000	Any other card number	Refused	> 9000	> 900000	4111113333333333	Uncertain	9999	999900	4111116666666666
TRANSACTION RESULT	BASED ON AMOUNT		BASED ON CARD NUMBER																					
	Amount	Amount × 100																						
Successful	0 - 9000	0 - 900000	Any other card number																					
Refused	> 9000	> 900000	4111113333333333																					
Uncertain	9999	999900	4111116666666666																					
Test-card numbers <table border="1"> <tbody> <tr> <td>VISA</td> <td>4111 1111 1111 1111</td> </tr> <tr> <td>Visa 3-D Secure</td> <td>4000 0000 0000 0002</td> </tr> <tr> <td>MasterCard</td> <td>5399 9999 9999 9999</td> </tr> <tr> <td>Diners Club</td> <td>3625 5695 5800 17</td> </tr> </tbody> </table>							VISA	4111 1111 1111 1111	Visa 3-D Secure	4000 0000 0000 0002	MasterCard	5399 9999 9999 9999	Diners Club	3625 5695 5800 17										
VISA	4111 1111 1111 1111																							
Visa 3-D Secure	4000 0000 0000 0002																							
MasterCard	5399 9999 9999 9999																							
Diners Club	3625 5695 5800 17																							
Make a test payment Make a test payment with Oqone e-Commerce Make a test payment with Oqone e-Terminal Make a direct query request Make a direct maintenance request Make a direct maintenance request for Purchasing Cards Test your SHA-1-IN Signature																								
Documentation and test pages Click here for an overview of documentation and test pages.																								

Figure 369: Test Info tab

This **'Test Info'** tab contains test data that is to be used during our testing phases. Since we do not want to use live credit card information the Test Info tab contains dummy credit card data for each payment type we specified earlier during our payment methods specification.

At this point, if we click on the confirmation button in the **'Test Info'** tab we will have completed the **'Technical information'** configuration of our account and if we visit our administration home page we should see the status illustrated in **Figure 370**.

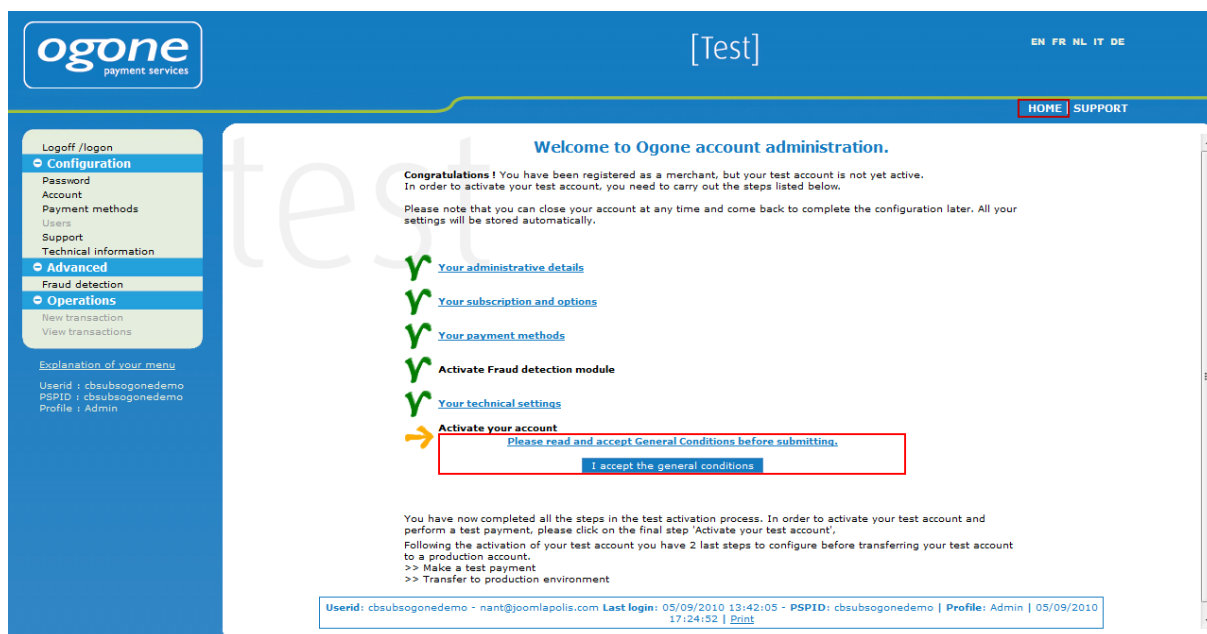


Figure 370: Ogone Test account final activation

On this figure we see that all is left to activate our test account is to read the general conditions information and click on the “I accept the general conditions” link. This will take you to the page illustrated in **Figure 371**, where you see the congratulations message along with any messages generated by Ogone. You will most likely also receive a confirmation email that your test account has been activated.

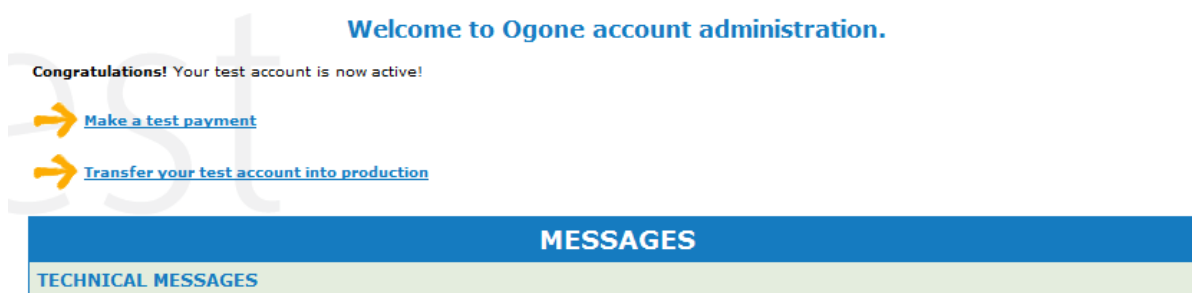


Figure 371: Ogone Test account activation success page

One last step is needed to make sure our Ogone test account is properly configured to accept **CBSubs™** test payments. We need to specify what currencies are permitted for payments. You can reach the Ogone Currencies setup page by selecting the Account menu and then the Currencies link from your Ogone administrative home page as illustrated in **Figure 372**.

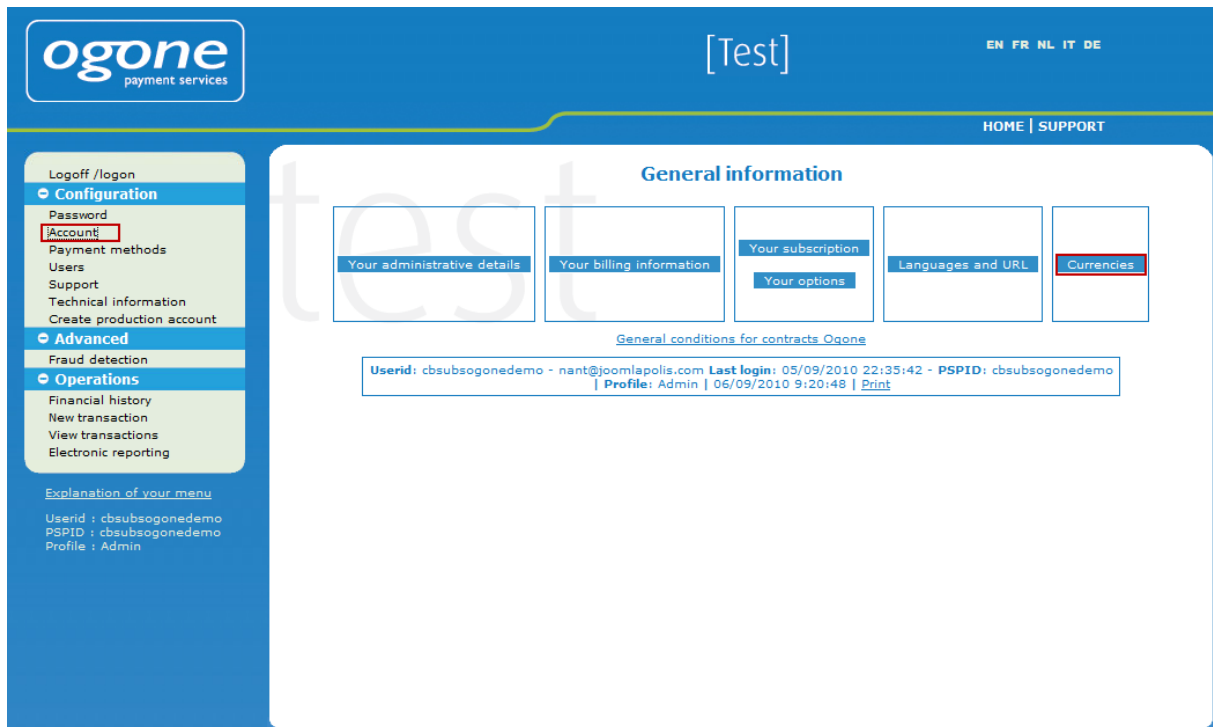


Figure 372: Ogone Currencies setup link

Once the Currencies link is selected you will be taken to the Currencies setup page as illustrated in **Figure 373**. In this figure we have configured the Euro and USD currencies and then clicked on the 'Confirm' button in lower right hand corner of the page.

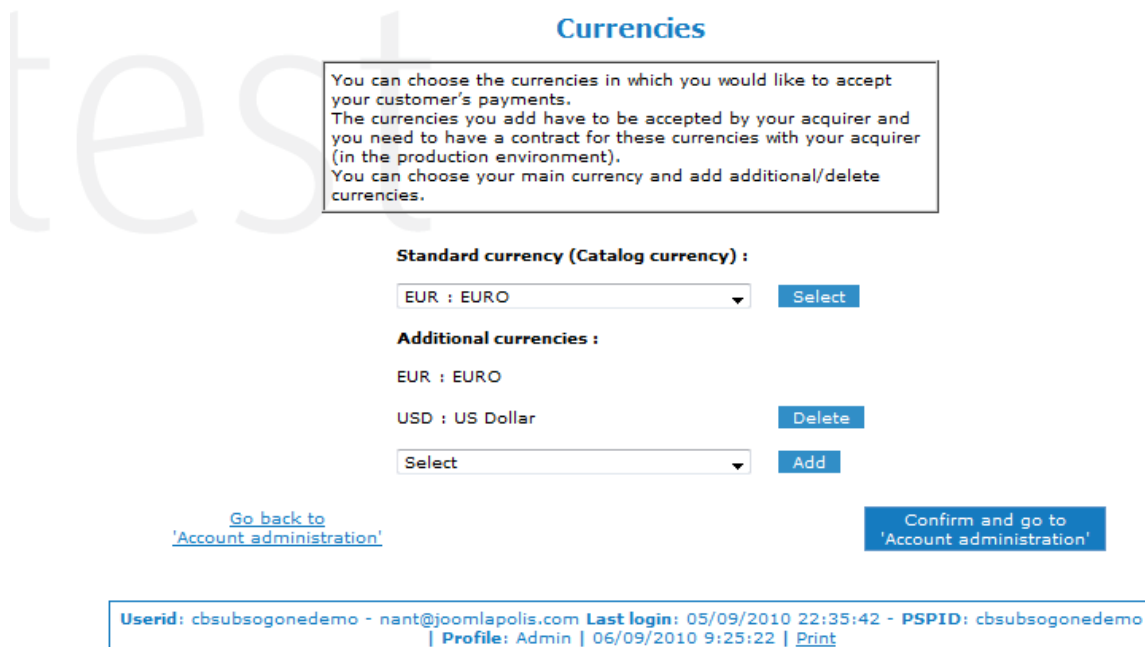


Figure 373: Ogone Currencies setup page

19 Installing OPENSSL on WINDOWS

OPENSSL functionality must be present on your web-hosting environment in order for the **CBSubs™** system to be able to handle secure payments. If your hosting company does not have such functionality enabled (along with **CURL**), you should request (demand) that such functionality be enabled. You will not be able to accomplish any serious e-commerce business in such an environment, so if your hosting company does not have these 'core' features enabled, then you should seriously consider changing hosting companies.

OPENSSL functionality is not only needed on your website environment, you will also need **OPENSSL** functionality on your local PC in order to generate the proper private keys and certificates needed to enable your PayPal Business Account to securely interact with your **CBSubs™** powered website.

You can download **OPENSSL** freely from the www.openssl.org website in source code form. Most likely a much better distribution package can be obtained from <http://gnuwin32.sourceforge.net/packages/openssl.htm> where you should select the complete package (except sources) setup distribution.

After you download and execute this **WINDOWS** distribution package it should by default install in your **C:\Program Files\GnuWin32** folder. To complete the **WINDOWS** installation you should complement the installation process by the following 2 steps:

- Append your **PATH** environment variable (My Computer (right click) → Properties → Advanced Tab → Environment Variables → User Variables) with **;%C:\Program Files\GnuWin32\bin** (see **Figure 374** and **Figure 375**)
- And you should add a systems variable (My Computer (right click) → Properties → Advanced Tab → Environment Variables → Systems Variables) named **OPENSSL_CONF** with the value **C:\Program Files\GnuWin32\share\openssl.cnf**

These steps are needed to be able to properly access and run the **OPENSSL** command from your **WINDOWS DOS** prompt as this will be needed to generate the proper private keys and certificates needed for your PayPal payment gateway.

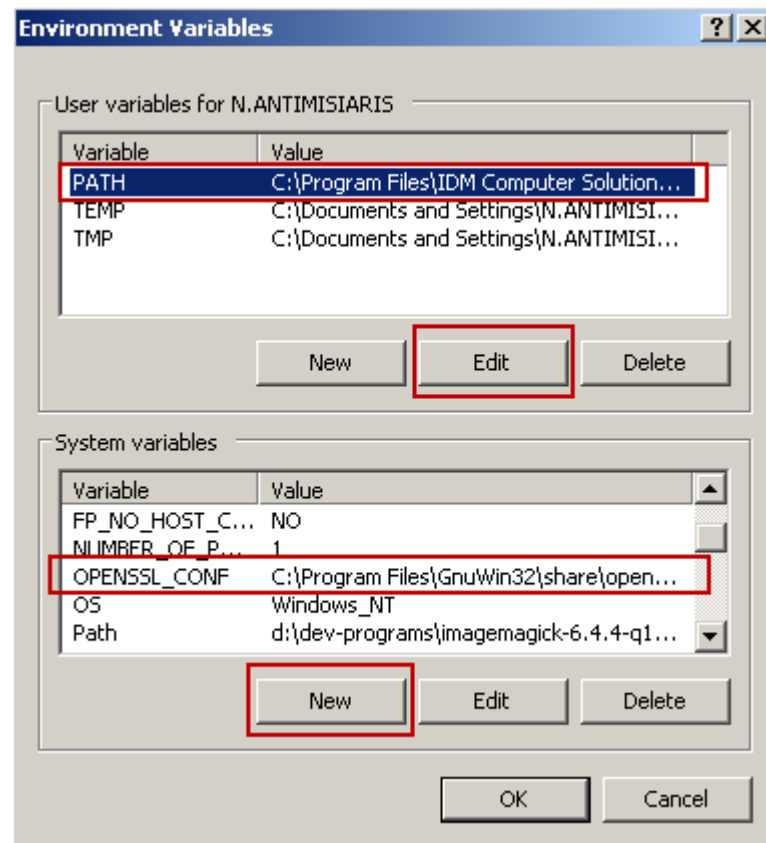


Figure 374: Environment Variables in WINDOWS client

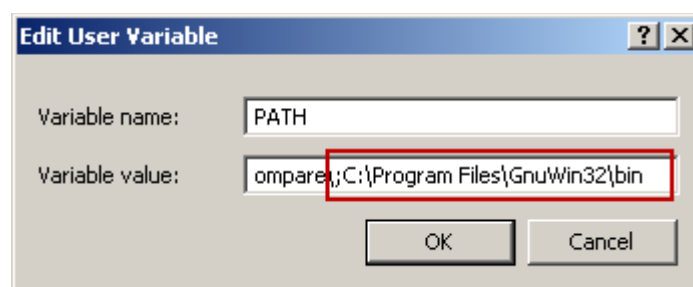


Figure 375: Editing your PATH environment variable on WINDOWS client