

Below are the deliverables as noted on page 1 Article 1 of the agreement.

## 1. Customizable Shipment Functionality

- Members currently have the ability to log in to their membership account during shipment months and customize the shipment. There is a requirement for the order (below example is 2 Oils, 1 other item) and this is always the default shipment if they choose not to login in and customize.
- The ability to set the club shipment as either a product minimum or a **dollar amount (Current Method)** minimum.
  - Product example: 2 Oils, 1 Other Item
  - Dollar amount: An order totaling \$80 of any products of their choice. **This will change each time depending on the shipment for that month.**
  - Customer is also able to add as many additional items to the club shipment. These items will consist of any currently active SKU on the website.
- We also allow members to “skip” and “hold” memberships. We need the ability to make these changes on the accounts from the backend. (IE: HOLD shipment through 12/31/17, nothing will be charge or shipped until after 12/31/17) **We do not want customers to be able to do this themselves they must call or email.**

Item	Price	Quantity	Subtotal
<a href="#">Remove</a> 375 ml Basil Olive oil- 12/16 TIN	\$33.00	1	\$33.00
<a href="#">Remove</a> 375ml Lemon Olive Oil 12/16	\$33.00	1	\$33.00
<a href="#">Remove</a> 500ml California Blend 12/16	\$42.00	1	\$42.00
<a href="#">Remove</a> 8oz Fig Balsamic	\$18.50	1	\$18.50
<a href="#">Add more</a>			
Total Items: 4			\$126.50
Club Shipment Discount			\$-18.98
Tax			--
Shipping + Handling			\$9.99
Total			\$117.52

\* Club Requirements:  
**Oils:** 3 items  
**Any:** 1 item

[DONE](#) [CANCEL](#)

## 2. Press Club Customer Data

- Billing, Shipping, Credit Card Information and the ability for the member to log into an account and personally update this.

- Ability to track how long this person has been a member (date joined). Ability to see what date a member had cancelled and the reason for cancellation.
- Ability to track ALL purchases made by the members (Online, POS, Club)
- Customer account in Magento would need to have 3 custom fields so that we are able to define. This will be for checking that the customer is Regular Customer, Club Customer, and one showing to store the CC information in Authorize.net.

There have been issues with member information updating between Revel and Vines, from club selections to purchases made. It would be great to be as close to accurate with data on this, especially purchase history and club shipments.

### 3. Reporting

- Either have reports than can be run for certain data (length of membership, lifetime value of customer purchases, members by state, members by zip code, retention, how many members joined online, # of cancels per time period etc.) or have this be available to be downloaded in an Excel format and be manipulated to find particular information.
- Pick-Up Members: The ability for the club member to select the items in store, make a payment in store, and have the payment record correctly in the shipment/group number. (retail sale vs. club sale) **Right now our system skips the pick-up members when the group order is built. They are then able to come in and customize their order and pay for it in store.**
- Ability to track sales by club shipment.

### 4. Gift Club Functions

- The gift purchaser can enroll the receiver in a membership based off of a set number of shipments. This would be pre-paid and the membership would automatically cancel after the selected # of shipments had been shipped. The receiver would have access to the account.

### 5. Shipping Functions

- It would be great if the POS, Club Management System, etc. could connect for shipping orders. Currently, there is not a way to send an order through the POS that would notify the shipping dept. Same with pick-up orders, there is no way to note that an order made online for pick up has been picked up. Everything is currently done manually.
- Connects with All shipping carriers used (currently: GSO, UPS, USPS) so that a tracking link is automatically attached to the shipping order once process and attached a shipping tag.
- Automatically sends an email to the customer when the tracking information has been assigned. (Very important for club shipments). Our current system currently has a template that is used when sending out messages.
- Ability for member to change the shipping address on one order. (For example, if they want to send their shipment to a friend, they can login and change the address on that

order without changing the address on their account). **This is part of customizing an order. This can be done during the time of customizing the order.**

- Ability to change flat rate shipping for a given club shipment as a special promotion. **This would vary for each club shipment and can be assigned when the products are being assigned.**

#### **6. Search Functions**

- Be able to have multiple ways to search for a club member: Last name, first name, email address, phone number.

#### **7. Tiered Discounting**

- Be able to offer different discounts to club members depending on the tier they may be in. Currently ALL the club types will either receive 15% off or no discount. We also offer an employee discount.

#### **8. Loyalty Program Add-On**

- The ability to have the option to introduce a loyalty program for club members. A layered system that might be able to track how many of a certain product they've bought, referrals, attached a point system to the dollar amount they have spent, etc.

#### **9. Other thoughts:**

- Automatic emails to club members about outdated or invalid credit cards. Currently, the system automatically emails these when the order processes. This is great, and it would be even better if it was automated prior to the shipment. Or, if we can run a report of expired and invalid cards we can be proactive about phone calls.
- The ability to make one transaction/purchase online but ship to multiple addresses through the online system. **Currently, they must do separate orders and re-enter the information each time.**