Included in this document is a guide to using CRU Club 2.0 subscription software.

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Please note: sections not covered in this documents include, but are not limited to the below, if you wish to change something not included in this document please contact support@cru.io with a detailed explanation of your desired changes or questions.

> Wine Club Shipping Costs
> Front End Images/Text
> Creating New Packs/Removing Packs
> Changing bottle/frequency options
SECTION 1

Editing your Club Pack Products

Navigating to your Wine Club Product:

1. Go to ‘Products’
2. Hover your mouse over the pack you want and select ‘edit’.
3. There is a product for every variation (Bottle/Frequency) i.e Choose Your Own 3 Monthly is a separate product to Choose Your Own 6 Monthly, you will need to edit all variations depending on your desired set up. You can filter the products by Wine Club/Subscription to view all in one list.

(continued on next page)
Once your in the product, select the Cru Club Mix tab:

1. To add a product to the pack, type in the name of the product you want to be included on the subscription and it will show as a suggestion. Clicked on the suggested product you want and then click ‘Add Product’ button.
2. Check this checkbox if you want this product to be a default product of the pack. If this pack is a set pack, make sure that all products that should be in the pack are set to default. All products that are not set to default in a set pack will not be included in the calculation of the total. If it is a custom mix pack, it is advisable to uncheck the checkbox. It will still show all the products that are added. If the checkbox was ticked for a product, it will be pre-selected on the subscription process (the process on selecting products for custom mix in the front-end by a customer).
3. Put the quantity of the product in the pack. If this is a custom mix pack and the checkbox on step 2.3 is unticked, make sure that the quantity is set to 1. If the checkbox was ticked, it will reflect the pre-selected quantity of the product as mentioned in step 2.3. If this is a set pack, just put the quantity of the product that should be in the pack.
4. Input the product display order. This will affect a custom mix pack. It will determine the product’s place during the signup process on the front-end.
5. Click this button if you want to remove the product you entered.
6. Save the product by clicking “Update” button.

Notes on Editing Your Pack:

1. You can edit the product and add more products in the pack any time. You may need to update your choose your own subscriptions, using the ‘Replace Product feature’ (section 3 below) If it is a set pack, you can edit the default products any time. Just don’t forget to sync the set pack subscriptions after the edit (Syncing process can be found in section 4 below).
2. If you are removing a product from your Wine Club, ensure you **DO NOT delete** or unpublish (draft) the product until you have edited all your packs and all existing subscriptions containing the product. The product is required to be published when synchronising/updating packs. You can hide the product from the shop rather than deleting/unpublishing by making the Catalog visibility: Hidden in the Publish box on the right hand side.

3. If you wish to change the Bottle Number and/or Frequency of your packs, please contact support@cru.io
SECTION 2

Manually Creating Subscription via Admin

Add the user to the site first by going to Users > Add New.

Fill out the users details: User Role is Subscriber, for the Send User Notification Checkbox, CRU recommends unchecking this so the customer DOES NOT get sent an automated email - This is a standard wordpress email and is not styled. CRU recommends sending a custom communication after you have added the user and their subscription.

Once you have added the user, click back into ‘Edit’ on the user and fill in their address and other details. These will be auto populated in when you add the user to the subscription later.

Once you have added the user ensure to add them to the relevant Wine Club GROUPS on the USERS page. This will ensure they receive their shop discount when logged into their account. Use the Groups function above the users list. The usual set up is to add them to 2 groups, a generic one, i.e ‘Wine Club’, and the discount, i.e ‘Wine Club 15’ (indicating 15% discount.) These groups are already be set up for you and you just need to search the relevant group when adding. Users who sign up through the front end are automatically added to these groups. When a wine club member cancels their subscription, you will need to remove them from the groups to ensure they do not continue receiving their discount.

1. Select User (can select multiple at once)
2. Choose Groups
3. Select Add to group (or remove from group if you are removing them), Select ‘Apply’
4. Check they are in the correct groups.

Once you have saved the user’s account and added them to the groups, follow the steps below.
(NAVIGATING TO WOOCOMMERCE SUBSCRIPTIONS ADMIN PAGE)

1 – In the Admin Dashboard, hover the cursor to “woocommerce”

2 – Click on “Subscription” as shown above.

3 – Click on “Add Subscription”.
1 – Select a customer you want to create subscription.

2 – Fill out Billing and Shipping details. (NOTE: Credit Card details to be filled out in Step 13 at the end of this document)

3 - Click “Create” button then wait for the page to reload to proceed to step 4.

4 – Select the pack you want to add.
5 – Select the numbers of bottles in the pack

6 – Select how often the customer will get the pack

**FOR SET PACKS**

7 – Click “Add Pack Mix” Button.

8 – Click “Recalculate” Button
(For Choose Your Own or Custom Mix Pack)

7 – Select how many bottles in the pack

Note: If the total number is more than the limit of the pack, then it will notify and will not proceed unless the total number of products selected is equal or less that the max or the pack limit.

8 – Click “Add Cruclub Mix” button

8 – Click “Recalculate” button.
9 – Set the recurring schedule according to the frequency of the selected pack.

10 – Set the next payment (Must be calculated according to the recurring schedule. You can edit the next payment date anytime you want)

11 – Set the subscription status to active.

12 – Save the subscription by clicking the “Create”/“Update” Button.
13 – Change payment method to “Credit Card” and fill out necessary information about the credit card.

14 – Save the subscription again by clicking “Update Button”.
SECTION 3

CRU Club Replace Product
(for ‘choose your own’ packs)

This feature allows you to update individual products within Choose Your Own subscriptions at a bulk level, instead of editing each subscription individually. This feature is ideal for out of stock / sold out / low stock products. You can switch out all subscriptions containing the product, or just a certain number by using the tick boxes.

1. Navigating to Replace Product Page

1.1. Hover the cursor over cruclub in the admin dashboard.
1.2. Click on “CruClub Replace Product” on the popped-up box.
2. Replacing product
2.1. Type in the input box the name of product you want to be replaced with on a specific/all subscription. Then select the product on the suggestions. **NOTE:** If you are removing a product from your Wine Club, ensure you **DO NOT delete** or unpublish (draft) the product until you have edited all your packs and all existing subscriptions containing the product. The product is required to be published when synchronising/updating packs. You can hide the product from the shop rather than deleting/unpublishing by making the Catalog visibility: Hidden in the Publish box on the right hand side.

2.2. After clicking the product on the suggestion, click on the “Search Subscription” button to have a list of subscription having the product on their packs. See image below.

2.3. Check the subscriptions you want to replace the product.
2.4. Type in the input box the name of product you want to replace. Then select the product on the suggestions.

2.5. After selecting the product, update the subscription/s by clicking “Update” button. And a message will show up like in the image below. Do not worry on recalculating the subscription/s to have an updated price, the subscription’s/s’ price will be automatically updated after you click the “Update” button.

Note: Do not sync subscription after replacing the product. The products in the pack will be back to what it is in the first place if you do.
If you update your set packs’ products/mix or if you update the pack pricing or set packs product price (if not using set pricing), you might need to update your existing subscriptions to make sure the changes reflect on each customers set pack subscription. Instead of going through all your set pack subscriptions to edit/recalculate their packs, you can just use this feature to synchronise them to the new pack mix/price.

Once you have gone and updated your Set Packs in the Products Tab (section 1 of this Document for updating packs), follow the steps below to synchronise your existing subscriptions to the updated packs.

1. Navigating to CruClub Synchronise page.

1.1. Hover the cursor over “CruClub” in the admin dashboard and click on “Cruclub Synchronise”.
1.2. Type in the subscription product you updated (2, 3). And click on the correct product on the suggestions. If you have subscription products that have the same names like in the image above, make sure that you select the correct product by hovering the cursor over the product’s name in the products page and look for the ID of the product and select the product having the ID on the suggestions.
1.3. Once you selected the product on the suggestion, click on “Search Subscriptions” button. And all the subscription having that subscription product will show up.

1.4. Tick all the subscription you want to update. If you want a subscription to not be updated for some reason, you can uncheck it and it will leave as it is.

1.5. Click the “Sync” button after ticking your subscriptions. After the sync, a notice will show on the page. See image below. After this notice shows, everything is good and the subscriptions were successfully updated.