
Dreamtrue Documentation

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Dreamtrue

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The documentation for Dreamtrue is organized into a couple of sections:

- *About*
- *Installation*
- *Configurations*
- *Management*
- *Marketing*
- *Front-end*
- *FAQs*

CHAPTER 1

About Dreamtrue Membership

2.1 Install the Component

Please install the component like most Joomla! extensions. Go to the menu *Extensions -> Manage -> Install -> Upload Package File*. Browse the installation package and click *Upload & Install*.

2.2 Install the Database

After installing the package, please enter the component *Dreamtrue Membership in Joomla! Components -> Membership-Online*“. Then go to the menu *Installation* to install the DB tables.

2.3 Manually Installation

If you have trouble in installing the package in the above way, the reason could be the server upload file size limit is low which disallows the package upload, or the server memory limit is low which stops the package extraction. In this case, we can use the manual way to install it. Please refer to the link [Manually Installing the Component](#) for the detailed steps.

CHAPTER 3

Uninstallation

To uninstall the component thoroughly from the Joomla! site, please uninstall the database first in the menu `Installation of Membership Online component`.

Then uninstall the component in Joomla! Extensions like other Joomla! extensions. Go to the menu `Extensions -> Manage -> Manage`. Search for `MOSCRIBE` and uninstall it. Now the uninstallation is done.

CHAPTER 4

Payment Methods

To make the membership system work, we need at least add one payment method so that the system can handle the registrations and orders . We can do it in the menu `Payment Methods`. We can then use the `New` at the top right corner to add payment methods from the the methods built-in the system.

Note: For basic users, only Off-line Payment and PayPal are available. Other payment methods need the premium membership. Please [contact us](#) if you need to add more custom payment gateways.

After adding a payment method, please configure it with your payment gateway account settings by the `ACTION` button.

Email Settings

We can edit the email templates for different events with memberships, such as user registration, membership signup, payment confirmation ,etc. All email templates are manage in the menu `Emails`.

We can then import the default email templates by clicking the button `Load Default Emails`. It will add all major emails with the default contents.

We can also add a new email template or edit the existing one. Click on the `New` button or the `Edit ACTION` to load the editing panel.

In the panel, we can define the email parameters.

1. In the `Email Type` drop-down menu, choose for what event the email will be triggered.
2. Edit the template body with the available variables which can fetch the user/membership information.
3. After saving the email, we can test it by entering the email address at the top right corner and clicking `Send`.

CHAPTER 6

Tax Settings

We can manage the Tax configurations in the menu Taxation.

If required, you can Load default Canata Tax Rate and Load default EU Tax Rate.

You can also define the custom Tax Rate by the Add Tax button and fill in the form.

CHAPTER 7

Group Licenses Configuration

Subscription Management

All membership/subscription plans are managed in the sidebar menu `Subscription Plans`. We can create the new plan by the `New` button, and also edit the existing plans by the editing buttons following each plan.

8.1 Basic Information

When creating a new plan, you need to configure the basic information. For each plan, we must define the title and the price package. Multiple price packages in the same plan are allowed. In the package, we can define the number of licenses with which the user can register the same number of accounts in the same subscription plan, and also the price. Generally, for the simple scenario, we only need one package which offers one license. In the case the front-end user just sign up the subscription for his/her own account. The detailed explanation of the fields is as below.

Field	Explanation
Title	Title of the subscription plan
Display Name	The plan name shown on the front-end registration form
Publish	If the subscription is published
Ordering	Defines the ordering of the plan in the front-end subscription list
Description	Description of the subscription plan
Currency	Currency of subscription plan price
Life Time Membership	Defines if the membership is a lifetime one
Renewal Options	If the plan is the auto-recurring subscription or one-off payment membership
Offering Trial	Defines if the subscription has a trial period when it's an auto recurring plan
Recurrence	The unit of the subscription recurrence period
Length	The length of each subscription recurrence period
Extra License Price	The price the extra license under the same plan
Add Package	At least a package is required to define the number of licenses and price of the plan
Package #x	Different price options defining different license numbers and prices

8.2 Email Hook

After a plan is created, we can further configure its settings. We can define the email templates which are used for this specific subscription plan. Click the `Email Hook` button in the **Hook** column. There, we can specific the email template to use for each even. The email templates need to be configured in advance in the global *Email Settings*.

8.3 Affiliate Commissions

In the `Affiliate Commissions` setting in the **Hook** column, we can link the subscription plan to the affiliate program. Currently, it supports the integration with iDevAffiliate.

Members and Orders Management

DreamTrue Membership combines the members and orders management into the same panel to maximally simplify the admin management work. Members and orders are listed in the menu `Orders`. The table shows the basic information and action buttons for all members and order including active / expired members and confirmed / pending orders. We can manage the existing members/orders information and also manually create new members/orders.

9.1 Search Existing Member/Orders

At the top of the page, we can see the search/filter functions to search for the users or orders. The filters include the membership plan, membership expiration date, payment method, order status and membership status.

9.2 Basic Member/order Information

For a record, it shows the basic information including the username, membership plan title, order date, price, order status, and member status. As a record is for one order, the same user may have several records in the list for the same membership or different memberships.

9.3 Manage Order Details

Click the `Edit` button in the **Order** column to view and edit the Order detailed information. Here, we can change the price of the membership and use `Update Price` button to update the price change with the payment gateway. Then the payment gateway will charge the new price in the next recurrence. We can also directly refund the order to the user. The API will automatically issue the refund from the payment gateway account and cancel the order.

Back to the order list, we can click the button under the **Recur** column to cancel a confirmed order or confirm a pending order. When a confirmed order is cancelled, the auto recurring payment will stop in the next recurrence, however, the order will not be refund the membership will stay active until the current expiration date.

9.4 Manage Members

There will be a small green check button for the active members. Clicking on the button will give the option to directly deactivate the membership manually. Also, there is the option to manually activate the membership for the inactive members by clicking the red cross button.

For an active member, we can further edit the membership details. Click the edit button in the **Member Status** column to open the editing panel.

9.5 Manage User Data

Users information can be managed through the button in the **User** column. We can edit the user's username, email, name, password. The information is synchronized with the information in the Joomla! database user tables.

Clicking on the button `Edit Billing Address` will switch the panel to the billing information management where we can manage and update the user's billing info.

9.6 Create New Member from Existing Users

If we want to add a new member to a membership from the existing users on the website, we can use the `New Member` button. Choose the membership plan and package and then search for the user whom we plan to add. As the member is manually added, we can set the payment method as the off-line payment (bank transfer).

9.7 Create New User

We can also add a new user to the website conveniently in the same panel. Click the `New User` button and enter the required user data. After the user is created, we can use the `New member` button again to add the new user to a subscription plan.

CHAPTER 10

Coupons

In the `Coupons` section, we can manage the coupons which offer discounts for users.

Add a new coupon by the `New` button or edit the existing one by the `Edit` button in the `ACTION` column.

Field	Explanation
Coupon Code	The code which the front-end user can use to claim the discount
Description	Description of the coupon code
Is Percentage	Defines if the discount a percentage or an absolute amount
Discount	The discount amount of the coupon code
Start/Expire Date	The date range that the coupon code is valid
Coupon Type	Defines if the discount is applied to the first payment or all payments
Applied Plans	Defined for which memberships the coupon is valid
Applied Currencies	For which currencies the coupon is applicable
Maximum Redemption Limit	Defines how many times that the coupon can be used

CHAPTER 11

Sales Statistics

CHAPTER 12

Sales Export

CHAPTER 13

Marketing with Mautic

CHAPTER 14

Membership Registration

Dreamtrue Membership Business Cases

Dreamtrue Membership helps many clients successfully build websites in different business scenarios, such as,

- *A. Magazine and Newspaper*
 - *B. Club Membership*
 - *C. Podcast / Media Streaming*
 - *D. Library*
 - *E. Listing Submission*
-

15.1 A. Magazine and Newspaper

With Dreamtrue membership, we can easily build a magazine / newspaper subscription website.

15.1.1 Scenario:

1. The website provides different magazines, newspapers or any other publications.
2. The publication contents are managed by Joomla! articles K2, the 3rd party extension.
3. A subscription controls one or several publications.
4. The subscription can be monthly, semiannually, annually, etc, and it can be one-off or auto recurring.
5. If a publication is controlled by a subscription, front-end users cannot read the full contents. The site admin can choose to show some specific contents to public for free.
6. Front-end users need to subscribe the subscription which controls the publication to have the full reading access.
7. There are 2 modes available, (A) the subscriber can view all existing issues of the publication when the subscription is active, or (B) the subscriber can only view the issues which are created within the subscription period.

15.1.2 Front-end Workflow:

1. When accessing the issue of the publication, site visitors will be shown a message describing the subscription and giving the signup link.
2. If the user has the subscription, he/she can login and can continue reading on the same page.
3. If the user is not a subscriber, he/she can choose to subscribe it. After the subscription, the user is redirected to the Member Panel link or back to the issue before the subscription (definable by the site admin).
4. The subscriber can manage the subscription in the Member Panel and also check the list of all publications/issues he/she can view.
5. Optional setting: the contents which the subscriber has viewed are still available even after the subscription is expired.

15.2 B. Club Membership

Dreamtrue Membership can build the website for the club membership registration.

15.2.1 Scenario:

1. The website provides different memberships of the club.
2. Memberships have different prices and lengths.
3. The registration form can collect the custom user information defined by the site admin.
4. Export the members list and detailed information.

15.2.2 Front-end Workflow:

1. The membership page shows all memberships.
2. The user chooses one to buy.
3. The user is redirected to the Member Panel after the payment.
4. There the user can print the membership card or get the unique membership code.
5. The site admin will get the notification for the registration.
6. The site admin can periodically export the new members to make the membership cards and deliver them by post.

15.3 C. Podcast / Media Streaming

Dreamtrue Membership can be used to build the website providing the Podcast / Media Streaming service.

15.3.1 Scenario:

1. The website provides podcast or media streaming service.
2. It offers different memberships with which the users can access different service. The memberships have different lengths such as 3 months, 6 months, 1 year, etc, and different access levels like category A, categories A+B, and unlimited.

15.3.2 Front-end Workflow:

1. List all membership options.
2. Users choose one of the options to pay.
3. Grant the access after the payment.

15.4 D. Library

15.4.1 Scenario:

1. The website has the materials which are only available for members.
2. The members can be organizations who can get the access from a specific IP range.
3. The IP range needs the site admin verification.

15.4.2 Front-end Workflow:

1. The users can choose the organization membership.
2. After joining the membership, the members have the option to submit the IP ranges.
3. The IP ranges can be automatically registered or need the site admin verification.
4. All visitors from the IP ranges can access the materials assigned to the membership.

15.5 E. Listing Submission

If you want to build a website with the paid listing service, Dreamtrue Membership can also help.

15.5.1 Scenario:

1. The website provides listing service, such as job positions, property sales/rentals, advertisements, etc. The listings can be managed by 3rd party extensions.
2. Different memberships defining the price, the number of listing to submit and the publishing period, for example, \$50 for 5 listing in 3 months, \$ 150 for 10 listings in 6 months, etc.
3. Users need to subscribe the membership to submit listings and have them published during the membership period.

15.5.2 Front-end Workflow:

1. Existing listings can be accessible by public on the website.
2. The business users need to register the membership to access the listing submission page.
3. After the listings are submitted, the website admin will verify to publish them.
4. The listings will be unpublished after the member's membership expires.

Manually Installing the Component

If the server has the relatively strict PHP settings, such as a low value of **upload_max_filesize** or **memory_limit**, the installation by Upload Package File or Install from URL in Joomla! might fail. In this case, we can apply a manual method to install the component.

1. Download the install package `com_moscribe.zip` to the PC.
2. Extract the package to have all source files.
3. Login the website FTP or go to the File Manager of the the Host Control Panel.
4. Create a new directory as `membership` in the `/site_root/tmp` folder.
5. Upload all files which we have extracted in the step 2 to the new directory.
6. Go to the Joomla! menu `Extensions -> Manage -> Install -> Install from Folder`, enter the absolute path of the about `membership` folder, for example,

```
/home/sites/public_html/xxxxxx/tmp/membership
```

7. Click the `Check & Install` button.

Then the component will be installed. Please enter the component and *Install the Database*.