

Movie Pass - Alerion

The Alerion system does not have a monthly subscription feature, or what some call a movie pass, feature built in. However, several retailers have used a work around to accomplish a subscription offer to their customers. This document will present the methods used by these retailers.

The four areas we will cover are:

- Setting up a pricing matrix for subscription plan customers.
- Setting up the customer record as a subscription plan.
- Charging the monthly fee.
- Knowing when the subscription plan has lapsed.

Setting Up a Pricing Matrix For Subscription Plan Customers

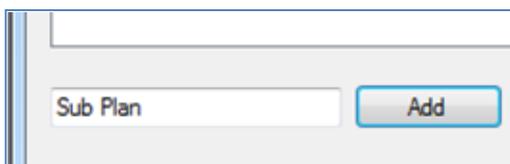
We need to create a new pricing matrix for customer's that purchase a subscription plan so that the category of movies they get to rent for \$0 during the month show up as \$0.

To create a pricing matrix for a subscription plan:

1. From the main menu.
2. Click Rental Pricing.
3. Click Pay At Check-Out Pricing tab.
4. Click the pencil icon next to the Matrix drop down box.



5. Type Sub Plan in the bottom left text box and click Add.



6. Click Close.
7. Choose Sub Plan from the Matrix drop down box.
8. Now go through each pricing category and put in the pricing you will charge the sub plan customer. For example, I may have a sub plan for catalog stock only. So I would enter my normal pricing on new releases, and all zeros for the catalog stock. Note: I recommend setting the default days out for the pricing category that will be free to 30 days so the movie does not show up on the late rental report. However, you can set this to any number of days. Just remember

after the number of days you set, the item will show up on the late rental report.

Items Rented	Sun Days	Sun Rental	Sun Per Diem	Sun ADR Fee	Mon Days	Mon Rental	Mon Per Diem	Mon ADR Fee
1	30	0.00	0.00	0.00	30	0.00	0.00	0.00

9. Once you have each pricing matrix set up, click OK.

Setting Up The Customer Record as a Subscription Plan

When a customer wants to purchase a subscription plan, we need to set up the customer record to reflect the sub plan. Selling the sub plan and charging recurring fees will be covered in a later section.

There are two things we need to think about when setting up a customer record for a sub plan:

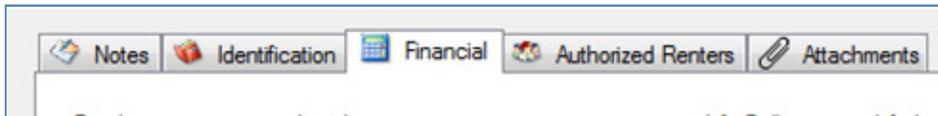
- Pay at Check-out Rental Matrix
- ID Card and ID Expires Fields

To setup the customer record:

1. From the transaction window.
2. Bring up the customer.
3. Click the Edit Customer icon.



4. Click the Financial tab on the customer editor window.



5. Choose Sub Plan in the Pay at Check-out Rental Matrix drop down box.

First In: 1/17/2014 | Last In: 1/17/2014 | Life Dollars: 0.00 | Life Invoices: 0

Credit Card Information:

Processor Alias: | CC Expire (M/Y): | Times Late: 0 | Lates Voided: 0

CC Number: | CCV Number: | Maximum Inventory Out: 3

Pay at Check-out Rental Matrix: Sub Plan

Automatically run Card for ADRs at Batch Check-In

6. Click the Identification tab.



7. Type Sub Plan in the ID Card field (This is just a note).
8. Enter a date 30 days from the current date in the ID Expires field. Note: this is the field will indicate when we need to charge the next monthly fee.

A screenshot of a software form titled 'Identification'. The form has a tabbed interface with 'Notes', 'Identification', 'Financial', and 'Authorized Renters' tabs. The 'Identification' tab is active. The form contains the following fields:

- SSN: An empty text input field.
- Birth Date: A date picker showing '1/17/2014' with a calendar icon and a dropdown arrow.
- ID Card: A text input field containing 'Sub Plan'.
- ID Expires: A date picker showing '2/14/2014' with a checkmark icon, a calendar icon, and a dropdown arrow.
- ID Card State: An empty text input field.

9. Click Save.

Charging The Monthly Fee

The three things we will look at are:

- Setting Up a Merchandise Item
- Charging The Initial Sub Plan Fee
- Charging Recurring Sub Plan Fees

To set up a merchandise item:

1. From the main menu.
2. Click Merchandise.
3. Click the Add New Merchandise icon.



4. For the ID Number, type SUB
5. For the Description, type something descriptive like Sub Plan, Subscription Plan, or Gold Plan. This will print on the customer receipt so use your terminology.
6. Department - create a new department called Sub Plans.

7. Enter the Retail price to the customer. In my example, I am charging the customer \$19.95.

ID Number	Description	Department
SUB	Subscription Plan	Sub Plan

On Hand	Reorder	Restock	Cost	Retail	Sold Number	Sold Dollar
0	0	0		19.95	0	0.00

8. Click Save.

To charge the initial sub plan fee:

1. From the transaction window.
2. Bring up the customer purchasing the sub plan.
3. Type SUB in the Enter ID Number field and press enter.

Enter ID Number
sub

4. You will see the sub plan on the invoice.

ID Number	Description	Qty	Extend
SUB	Subscription Plan	1	19.95
	1 @ 19.95		

5. Set up the customer record as a sub plan as described above.
6. You can also begin renting movies on the same invoice since you have changed the pricing matrix of the customer to sub plan.
7. In my next example, you will see the purchase of a sub plan, a rental of a catalog stock (which is included in the sub plan so it is free), and a new release at regular price because this pricing

code is outside the sub plan.

ID Number	Description	Qty	Extend
 SUB	Subscription Plan 1 @ 19.95	1	19.95
 T1234	DVD-DEXTER S4-D3 30 day rental for 0.00 DUE: Sun 16-Feb-2014 @ 06:00 PM	1	0.00
 3391914530...	BD-ELYSIUM 1 day rental for 2.95 DUE: Sat 18-Jan-2014 @ 06:00 PM	1	2.95

Charging Recurring Sub Plan Fees

To charge the recurring fees, we will be using a report to list customers who's ID Expired field is less than the current date. So we will set up a customer filter and save it so we can use it each time we want to run this report.

To create and save the filter:

1. From the main menu.
2. Click Database Reports.
3. Customer Reports.
4. Customer Listing.
5. Click New Filter.



6. For the filter description, type Sub Plan Renewals.

Filter Description
Sub Plan Renewal

7. Click Add Row Filter.



8. Choose ID Expire Date in the Table Column drop down box and click Next.



9. Choose Not Greater Than in the compare drop down box and click Next. This will choose customers with sub plans that expire today or in the past.



10. Click Variable, choose <Run_Date> in the drop down box, and click Add.

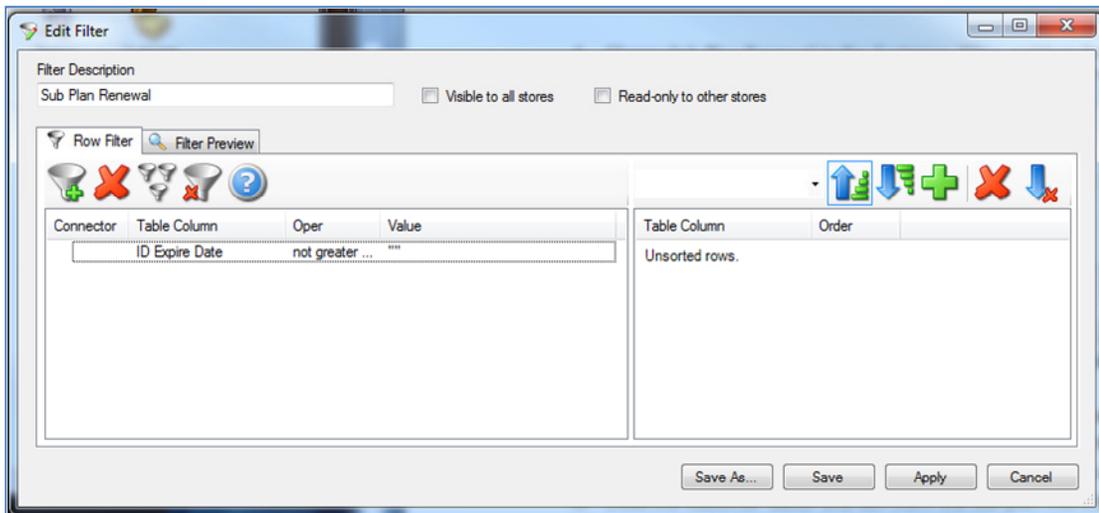


11. Click Save.
12. Alerion will tell you that the filter has been saved. Click Ok.
13. Now this filter can be used over and over, you don't need to create it each time.
14. From here you can click print to print the report or close.

To run the sub plan renewal report:

1. Click Database Reports.
2. Click Customer Reports.
3. Click Customer Listing.

4. Choose Sub Plan Renewal in the Customer Filter and Sort Order drop down box.



5. Click Print.
6. Now take your list and bring up each customer at the transaction window.
7. Edit the customer's information and click the Identification tab. You should see Sub Plan in the ID Card and a date in the past for the ID Expires. This means you need to renew it.
8. Close the customer editor and sell them the sub plan merchandise item by entering SUB at the transaction window.
9. Complete the transaction and run their credit card by using the card on file feature, if using X-Charge, otherwise you have to run the card manually.
10. When the transaction completes, bring the customer backup and reset the ID Expires field to 30 days from today. The reason we don't reset it when we first go in is we don't know if their credit card will run successfully.