

Installation and settings of BIT Change Shopper Group for Virtuemart

Part I: Joomla! settings

Important: Make sure your Joomla! setting for **New User Account Activation** is set to 'none'. Otherwise customers who register will only be moved after they log in next time...

Part II: Installation and settings of the plugin

1. Install the plugin (plg_bit_vm_change_shoppergroup) via the Joomla! installation routine.
2. Go to the plugin manager and open the plugin.
 - In the first input field enter your licence key (contained in your confirmation e-mail). This key is needed in order to use Joomla's automatic update notification and installation. If you don't enter a (valid) key or if your key is expired, you can still use the plugin, but you will no longer be able to do any automatic updates of the plugin.

There are 5 possible options for changing the shopper group of guests as well as registering clients:

- *no*: the shopper group of the customer won't be changed but stays the default shopper group (usually **-anonymous-** for guests, **-default-** for registering clients).
- *yes, selectable by user*: the customer can select the shoppergroup during checkout/registration. In order to use this option, you have to select the name of the Shopper Field you created for this purpose (see Part II).
- *yes, automatically*: the customer will be always moved to the shopper group that you select in the corresponding field below.
- *yes, upon shopper field entry*: if the customer enters something in the shopper field you specify below, he will be moved to the shopper group that you select in the corresponding field below. If you want to check for a specific value (i.e. a code) for this field, you can enter that value in the field below.

Note: If a customer performing guest checkout leaves the specified shopper field blank, he will be moved to the default shopper group for **registering clients** (i.e. he will be treated like a registering customer). See example 2.

- *yes, upon a valid VAT ID*: this options requires the plugin **BIT Check VATID for Virtuemart**. If that plugin is installed and evaluates an entered European Vat ID as valid, the shopper is moved to the shopper group that you select in the corresponding field below. Note: If a customer performing guest checkout leaves the EUVAT field blank (or enters an invalid ID), he will be moved to the default shopper group for **registering clients** (i.e. he will be treated like a registering customer). See example 3.
- *by countries*: this option can be used to move customers to a certain shopper group depending on their countries. The settings are entered in the corresponding tab "Country settings". You can set up as many assignments as you need (click on the plus button). For countries that are not covered in one of the assignments, customers stay in the default shopper group.

Note: this option is only available for Joomla! 3.6 or newer.

3. Note that guests and registering clients can be assigned to different groups if you need/wish that.
4. The moment that the shopper group is effectively changed depends on the setting for the parameter *Plugin scope*. For the default setting 'Cart/Ceckout' the shopper group is assigned to the customer after he entered an address during checkout. Select this option if you don't have any other place on your site, where customers can enter their

address. If you select 'Virtuemart', the shopper group is assigned as soon as the customer entered an address and goes to any Virtuemart page (e.g. category overview page, product details page, cart etc.). If you select 'site', the shopper group is assigned as soon as the customer entered his address. Note that the options can slightly vary in speed, so select the one that best fits your needs.

5. Guests will be assigned to the selected shopper group temporarily for the session, registering shoppers will be moved permanently to the new group.

Important Note: Customers will be **moved** (not additionally assigned) from the existing group into the new group. If you want to manually add shoppergroups for certain customers (like VIP shoppers), you can do that under the following restriction: the manually added shopper group has to be of type "additional shoppergroup" (that can be marked by a checkbox in the backend of the shoppergroup). "Additional shoppergroups" are not touched by our plugin. If you have assigned multiple shoppergroups that are not "additional shoppergroups", it's the shopper group with the lowest ID that get's replaced. So be careful with multiple shopper groups.

Part III: Creation of a Shopper Field for selection of shoppergroups

If you would like your shoppers to select their shopper group, you need to add a Shopper Field to offer them the available shopper groups:

1. In Virtuemart's backend, open the menu item **Shopper Fields** and add a new shopper field by clicking on **New**.

The screenshot shows the VirtueMart backend interface. On the left, a navigation menu lists various sections: Products, Orders & Shoppers, Manufacturers, Shop, Configuration, Configuration, **Shopper Fields** (circled in red), Order Statuses, Currencies, and Countries. At the top right, there are three buttons: 'New' (a plus sign in a circle, circled in red), 'Edit' (a pencil icon), and 'Required' (a checkmark icon). The main content area displays a table titled 'Shopper Field List' with a filter input, 'Go', and 'Reset' buttons. Below the filter, it shows 'Results 1 - 31 of 31'. The table has two columns: 'Field name' and 'Field title'. The table contains the following entries:

Field name	Field title
delimiter_userinfo	Shopper Information
name	Displayed Name
username	Username
password	Password
password2	Confirm Password
delimiter_billto	Bill To Information
address_type_name	Address Nickname

2. Select **Drop Down (Single Select)** as field type of the new field.
Enter the shopper groups, that you would like to offer to your clients:

Shopper Field Details

Field type: select

Use the table below to add new values.

Value	Title
<input type="text" value="1"/>	<input type="text" value="Standard"/> -
<input type="text" value="2"/>	<input type="text" value="Premium"/> -
<input type="text" value="5"/>	<input type="text" value="Friends"/> -

Field name:

Field title: (Shopper Group)

In the **Value** fields you have to enter the id of the shopper group, the **Title** is what the shopper will see in the drop-down list during checkout and can be any string.

Note: Make sure you don't include any shoppergroups that are of type "additional" in this list (see important note above) in case you have any.

Make sure the field is published and shown in account maintenance:

Default:

Required: No Yes

Show in registration form: No Yes

Show in account maintenance: No Yes

Show in shipment form: No Yes

Read-Only: No Yes

Published: No Yes

If you prefer to use radio buttons instead of a drop-down list, it works the same way.

Example 1: Tax (Vat) for a B2C shop in the EU with guest checkout

If you're running a B2C shop in the EU, you probably need the following taxes displayed:

- your country specific tax (Vat) for all anonymous visitors
- your country specific tax (Vat) for all customers with a shipping address inside the EU
- no tax for all customers with a shipping address outside the EU

While this setup is possible with Virtuemart options if you force your customers to register, you run into problems if you allow guest checkout. In this case you won't be able to setup the correct taxes for guests in all cases. **BIT Change Shopper Group for Virtuemart** will help you to achieve this.

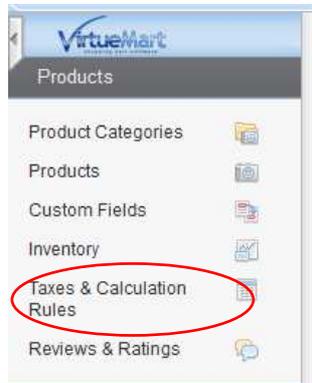
1. Setup of the plugin:

Move guest customers automatically to the default shopper group for registering clients. Don't move registered clients. (Of course, you can also specify other groups but it is important, that you move guests automatically.)

Move guests?	<input type="text" value="yes, automatically"/>
Shopper group for guests	<input type="text" value="Default Shopper Group"/>
Move registered clients?	<input type="text" value="no"/>
Shopper group for registered clients	<input type="text" value="Default Shopper Group"/>

2. Setup of your tax rates:

- Click on **Taxes & Calculation Rules**



- Click on **New** to setup a new tax rule and enter the correct values for your country (in the example below it's the German VAT)

Tax & Calculation Rule Details

Calculation Rule name:

Published:

Ordering:

Description:

Type of Arithmetic Operation:

Math Operation:

Value:

Currency:

Product Category:

Shopper Groups:

Country:

State / Province / Region:

Visible for Shopper: No Yes

Visible for vendor: No Yes

Start Date:

End Date:

- This rule is applied if a customer enters an address. There are 2 important things here: assign the rule to the shopper group -default- (if you setup different groups in the plugin you have to enter these here) and add all countries of the EU. As of January 2013 these are: Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom
- Save and setup a second tax rule. Again, enter the correct values for your country (in the example below it's the German VAT):

Tax & Calculation Rule Details

Calculation Rule name: MWst. 19%

Published:

Ordering: 1

Description: Tax for anonymous visitors

Type of Arithmetic Operation: Vat tax per product

Math Operation: +%

Value: 19.0000

Currency: Euro

Product Category: Select some Options

Shopper Groups: **-anonymous-**

Country: Select some Options

State / Province / Region: Select some Options

Visible for Shopper: No Yes

Visible for vendor: No Yes

Start Date: 11/26/12

End Date: -Never-

- This rule applies to all anonymous visitors of your page. Therefore enter the corresponding shopper group -anonymous- and don't enter any countries.
- Save and you're done.

Important: Make sure you don't specify any specific tax rules at the products themselves. Those would override the general tax rules!

Example 2: Moving customers to a B2B shopper group if they enter a company name

In this example we show how to move customers to a B2B shopper group if they enter a company name.

1. Create a shopper group for B2B customers and remember the Id (4 in this example) or use an existing one:

<input type="checkbox"/>	Shopper Group Name	Shopper Group Description	Default	Published	Id
<input type="checkbox"/>	-anonymous-	Shopper group for anonymous shoppers		<input checked="" type="checkbox"/>	2
<input type="checkbox"/>	-default-	This is the default shopper group.	★	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	B2B	Business shoppers		<input checked="" type="checkbox"/>	4

2. Take a look at your shopper fields and remember the name of the one you are going to use. In this case it's **company**, but you can also take a different one or create a new shopper field for this purpose:

Field name	Field title	Field type	Required	Published	Show in registration form	Show in shipment form	Show in account maintenance	Reorder	Id
delimiter_userinfo	Shopper Information	delimiter	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1 2
name	Displayed Name	text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2 5
username	Username	text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3 6
password	Password	password	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4 2
password2	Confirm Password	password	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5 3
delimiter_billto	Bill To Information	delimiter	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6 8
address_type_name	Address Nickname	text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7 7
company	Company Name	text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8 9

3. Plugin settings:

Move guests?

Shopper group for guests

Move registered clients?

Shopper group for registered clients

Shoppergroup field name

Shopper field name

Select 'yes, upon shopper field entry' for guests (if you allow guest checkout) and also for registering clients. Select your B2B shopper group as your target shopper groups. Finally select the Shopper field you want to use ('company' in this example).

Now all customers who enter a company name are moved to the shopper group B2B (for which you can e.g. specify special prices or conditions). All other clients become members of the default shopper group. Note that this also applies to guest customers (who are normally in the group -anonymous-), so that all customers (i.e. visitors who enter an address) are treated the same way, regardless of whether they register or perform a guest checkout.

Example 3: Tax (Vat) for a B2B/B2C shop in the EU

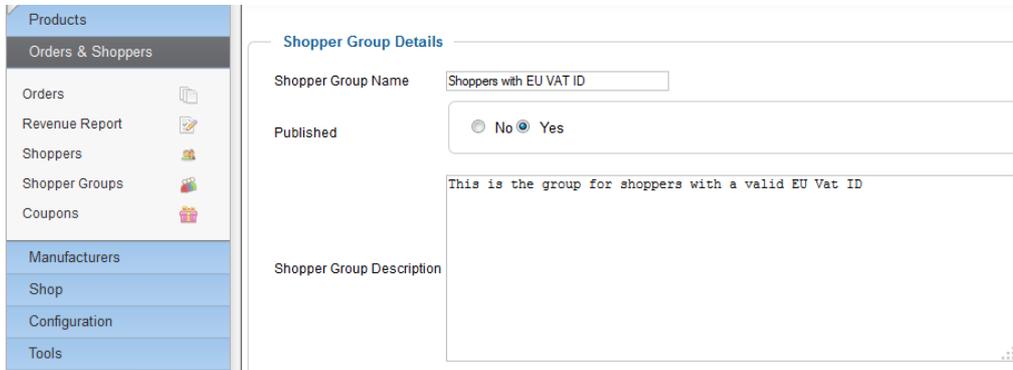
If you're running a shop in the EU and address business customers (in addition to end customers), you probably need the following taxes displayed:

- your country specific tax (Vat) for all anonymous visitors
- your country specific tax (Vat) for all non-business customers with a shipping address inside the EU and for all customers with a shipping country that corresponds to the country, where your shop is located

- no tax for all customers with a shipping address outside the EU or a shipping address inside the EU and a valid VAT ID

BIT Change Shopper Group for Virtuemart combined with the plugin **BIT Check VATID for Virtuemart** will help you to achieve this:

1. Create a new shopper group for your customers with a valid VAT ID:



2. Setup of the plugin:

Select option 'yes, upon a valid VAT ID' for guests (if you allow guest checkout) as well as registered customers. Select the shopper group you created for customers with a valid VAT ID (Shoppers with EU VAT ID in this example). Select 'no' for the parameter 'Move natives', so that customers from your own country are not moved. The plugin scope depends on your structure of your page.

Move guests?

Shopper group for guests

Move registered clients?

Shopper group for registered clients

Shoppergroup field name

Shopper field name

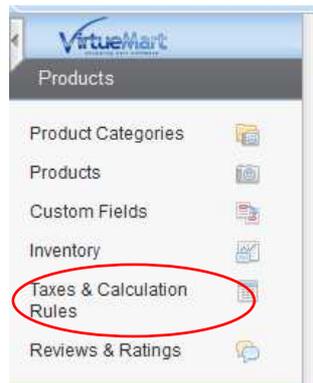
Shopper field value

Move natives? no yes

Plugin scope Cart/Checkout Virtuemart Site

3. Setup of your tax rates:

- Click on **Taxes & Calculation Rules**



- Click on **New** to setup a new tax rule and enter the correct values for your country (in the example below it's the German VAT)

Tax & Calculation Rule Details

Calculation Rule name	<input type="text" value="Tax 19%"/>
Published	<input checked="" type="checkbox"/>
Ordering	<input type="text" value="2"/>
Description	<input type="text" value="Deutsche Mehrwertsteuer"/>
Type of Arithmetic Operation	<input type="text" value="Vat tax per product"/>
Math Operation	<input type="text" value="+%"/>
Value	<input type="text" value="19.0000"/>
Currency	<input type="text" value="Euro"/>
Product Category	<input type="text" value="Select some Options"/>
Shopper Groups	<input type="text" value="-default- x"/>
Country	<input type="text" value="France x"/> <input type="text" value="Germany x"/> <input type="text" value="Italy x"/> <input type="text" value="Luxembourg x"/>
State / Province / Region	<input type="text" value="Select some Options"/>
Visible for Shopper	<input type="radio"/> No <input checked="" type="radio"/> Yes
Visible for vendor	<input type="radio"/> No <input checked="" type="radio"/> Yes
Start Date	<input type="text" value="02/21/10"/> <input type="button" value="x"/>
End Date	<input type="text" value="-Never-"/> <input type="button" value="x"/>

- This rule is applied if a customer enters an address without a (valid) VAT ID. There are 2 important things here: assign the rule to the shopper group - default- (or whatever your default shopper group for registering clients is called) and add all countries of the EU. As of January 2013 these are: Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom
- Save and setup a second tax rule. Again, enter the correct values for your country (in the example below it's the German VAT):

Tax & Calculation Rule Details

Calculation Rule name: MWst. 19%

Published:

Ordering: 1

Description: Tax for anonymous visitors

Type of Arithmetic Operation: Vat tax per product

Math Operation: +%

Value: 19.0000

Currency: Euro

Product Category: Select some Options

Shopper Groups: **-anonymous- x**

Country: Select some Options

State / Province / Region: Select some Options

Visible for Shopper: No Yes

Visible for vendor: No Yes

Start Date: 11/26/12

End Date: -Never-

- This rule applies to all anonymous visitors of your page. Therefore enter the corresponding shopper group -anonymous- and don't enter any countries.
- Save and you're done.

Important: Make sure you don't specify any specific tax rules at the products themselves. Those would override the general tax rules!