Bitrix Site Manager 6.x

Quick Guide to Selling Content

Introduction

This guide is intended for novice users of *Bitrix Site Manager*. The guide contains a detailed description of the technology which enables users to sell content on their sites.

The content selling technology is built upon the access permission distribution, which is the basic principle of *Bitrix Site Manager*. Each user group is assigned a unique set of permissions allowing their members to obtain access to the specified information. When a visitor buys content, they are added to a user group whose members are allowed to access the paid content.

Hence, the content selling process comes to selling the user group access permissions. Access permissions may be sold for a definite period of time (subscription), or forever.

Generally, the content selling process can be described by the following sequence of actions:

- creating a user group allowed to access the paid information resources;
- switching the user group into the access permissions selling mode;
- creating and customizing a commercial catalog to be used for content selling;
- configuring the e-store;
- publishing the paid content for sell;
- receiving and processing orders.

In this document, we shall consider the process of selling the subscription for full articles.

Creating and configuring a user group

Since the content selling is based on granting membership in user groups whose members have required access permissions, the first thing to do is create and set up a user group whose membership is to be sold.

To create a new user group, do the following.

- Open a page containing the list of user groups: *Settings* > *Manage users* > *User groups*.
- Click the **Add group** button on the context toolbar. This will open a new group creation form (fig. 1.1).

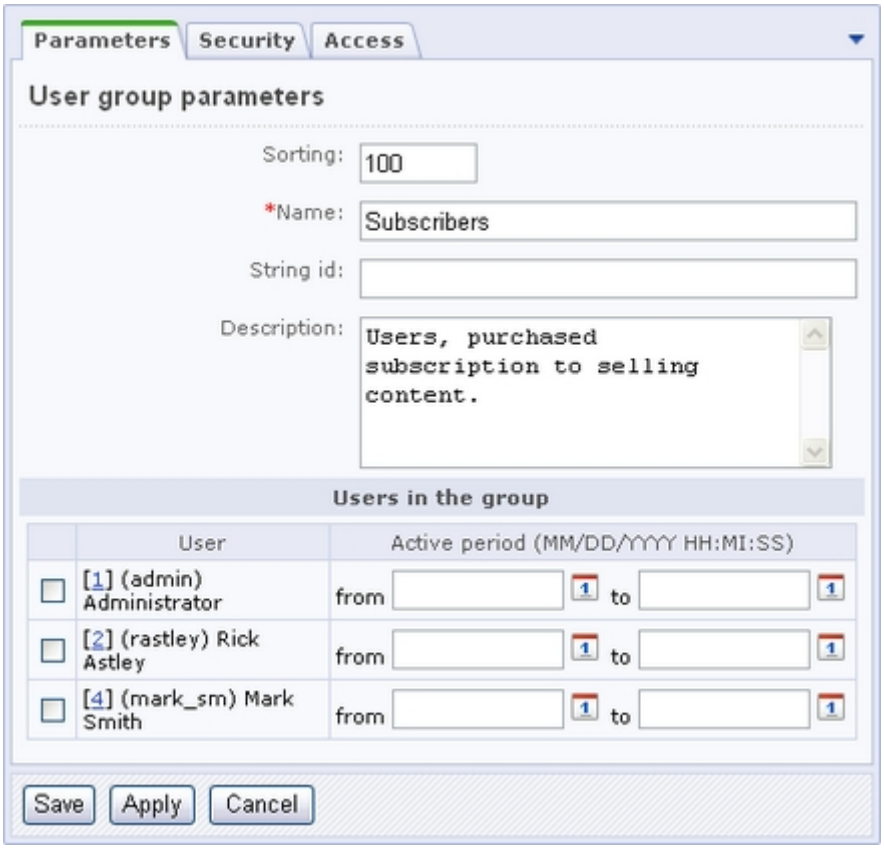


Fig. 1.1. User group creation form

- Specify the following parameters:
  - **Sorting**: the sort weight of the new group. This value specifies the position of the user group name in lists. The less is the value, the higher the group name goes in lists.
  - **Name**: the name of the new group. This field is required.
  - **String ID**: the user group code (optional).
  - **Description**: the arbitrary description of the group.

The **Users in the group** section is used to add existing registered users to the current group and specify the membership duration.

The **Access** tab (fig. 1.2) specifies permissions of user group members to access the Control Panel functions of different system modules. Since the members of the **Subscribers** user group

will be able to access information only in the *Public section*, leave the values of all fields set to **<default>**.

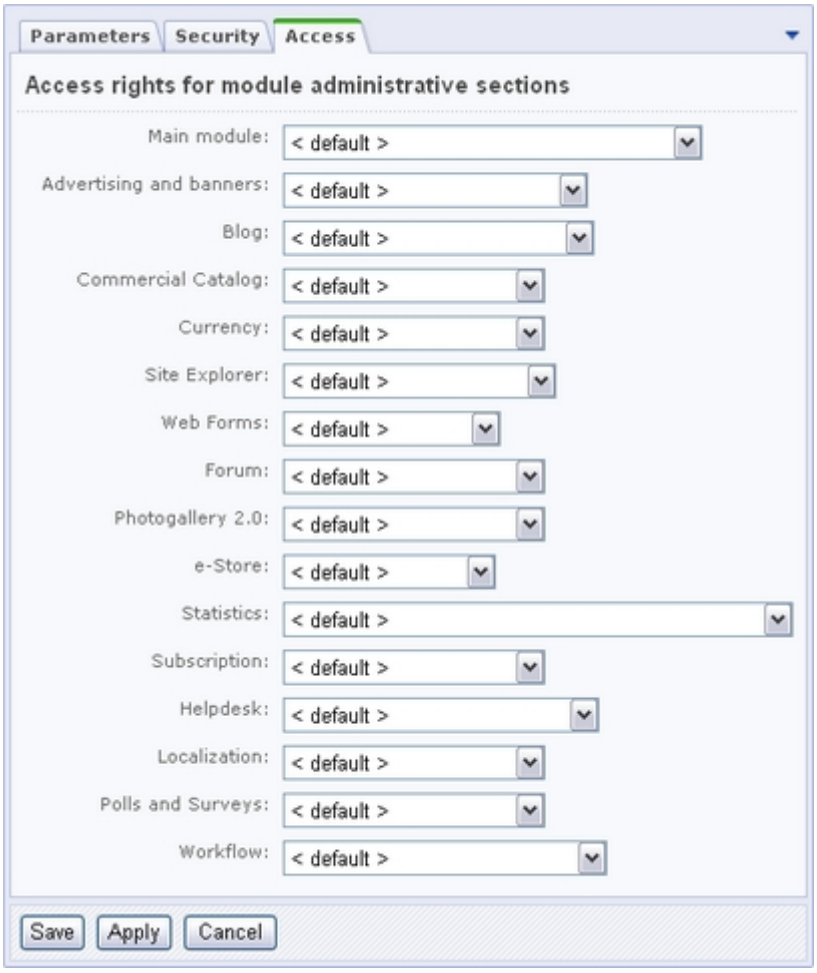


Fig. 1.2. Access permission management

- Click **Save** to create the new user group.

Creating Paid Content and Access Services

We shall use information blocks to create pain content (articles) and the paid resource catalog (subscription for articles). However, before we create information blocks of this kind, we have to set up a new information block type (call it, for example, **Paid Content**).

New Information Block Type

To create a new information block type, follow the instructions below.

- Open *Content* > *Information blocks* > *Information block types* in Control Panel.
- Click the **Add new type** button on the context toolbar. This will open the information block type creation form.
- Specify the ID and the name of the new type, for each of the languages installed in the system (fig. 2.1).

Fig. 2.1. New information block type creation form

- Save the new information block type.

New Information Block: Paid Articles

The **Paid Articles** information block will contain elements (articles) whose full text will only be available for paid users. To create this information block, do the following.

- Open *Content* > *Information blocks* > *Information block types* > ***Paid Content*** in Control Panel.
- Click the **Add information block** button on the context toolbar. This will open the information block creation form (fig. 2.2).

Fig. 2.2. New information block creation

- Fill in the form fields. Specify the information block name and select the site where it will be displayed. To get the detailed information about the creation of information blocks, please refer to the online help section.

⚠ ***Note!*** *The form requires that you specify the section (directory) where you will save the pages to display the contents of this information block (e.g.* ***/e-store/paid/****).*

- Click **Save**. A new form (*Content* > *Paid Content*) will open (fig. 2.3).

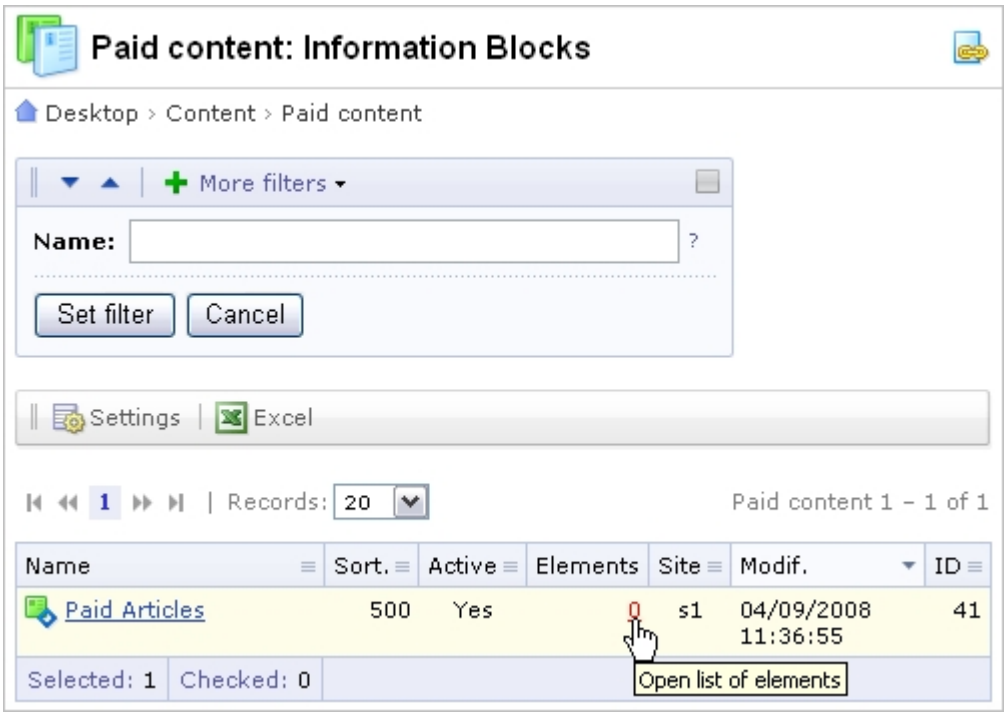


Fig. 2.3. The "Paid Content" information blocks

Now that we have created the information block, we can add elements to it.

- Click on the link shown as the number of elements (see fig. 2.3) to open the form with elements of the **Paid Articles** information block.
- In that form, click **Add element** on the context toolbar. An information block element creation form will open (fig. 2.4).

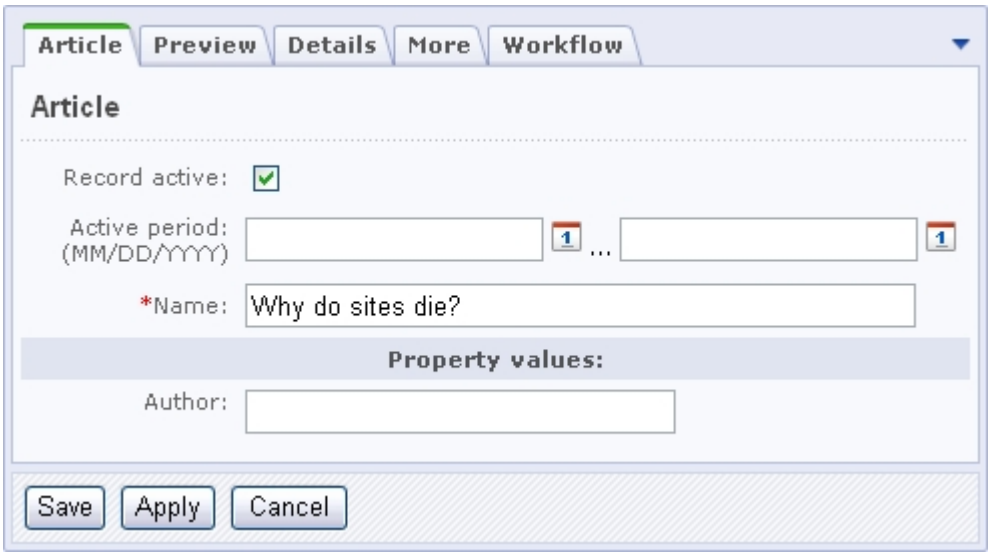


Fig. 2.4. Creation of a new element (article)

- Fill in the form fields in all tabs (the name, the preview text, the details etc.). You can find the detailed information about the creation of information block element in the online help section.

- Click **Save**. A new form displaying the elements of the **Paid Articles** information block will open (fig. 2.5).
- Repeat these steps to add more articles if required:

	Name	Active	Sort.	Modif.	ID	Status	Locked
	Why do sites die?	Yes	500	05/29/2007 10:52:02	1333	Published	
	Selling content	Yes	500	05/17/2007 10:47:52	1332	Published	
Selected: 2	Checked: 0						

Fig. 2.5. Elements of the "Paid Articles" information block

Selling Subscription for Paid Articles

In order to enable visitors to purchase access to the paid site sections, we have to set up the following essential elements:

- create a catalog of paid access services;
- configure the services catalog for use as a content selling catalog.

Creating the Access Subscription Catalog

- Open the form showing the information blocks of the **Paid Content** type: *Content* > *Information blocks* > *Information block types* > *Paid Content*.
- Create a new information block, for example: **Selling subscription to access paid articles**. Click **Add information block** on the context toolbar to open the information block creation form.
- Specify parameters of the new information block (fig. 2.6). This information block will be used to render the content selling services.

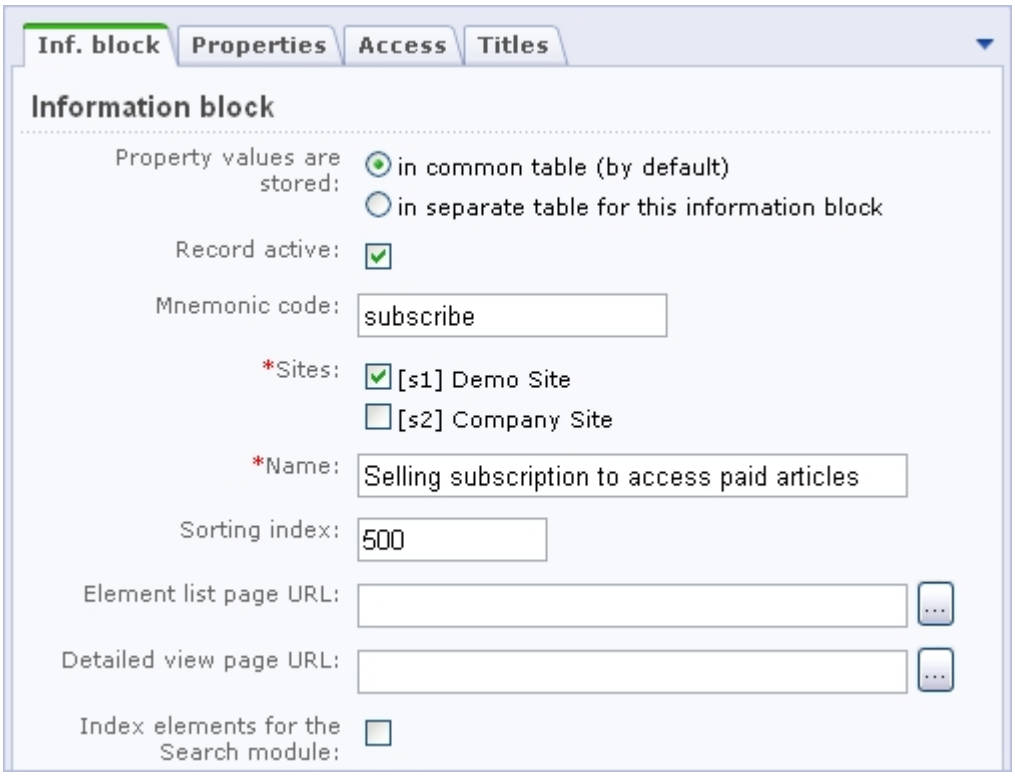


Fig. 2.6. New information block

- Save the information block by clicking **Save**.

Turning the Information Block into a Commercial Catalog

Now, perform the following actions to make the information block act as a content selling enabled commercial catalog.

- Open the **Commercial Catalog** module settings page (*Settings* > *System settings* > *Module settings* > *Commercial Catalog*).
- Switch to the **Catalogs** tab.
- Mark the options **is a commercial catalog** and **Content Sale** beside the **Selling subscription to access paid articles** information block (fig. 2.7).

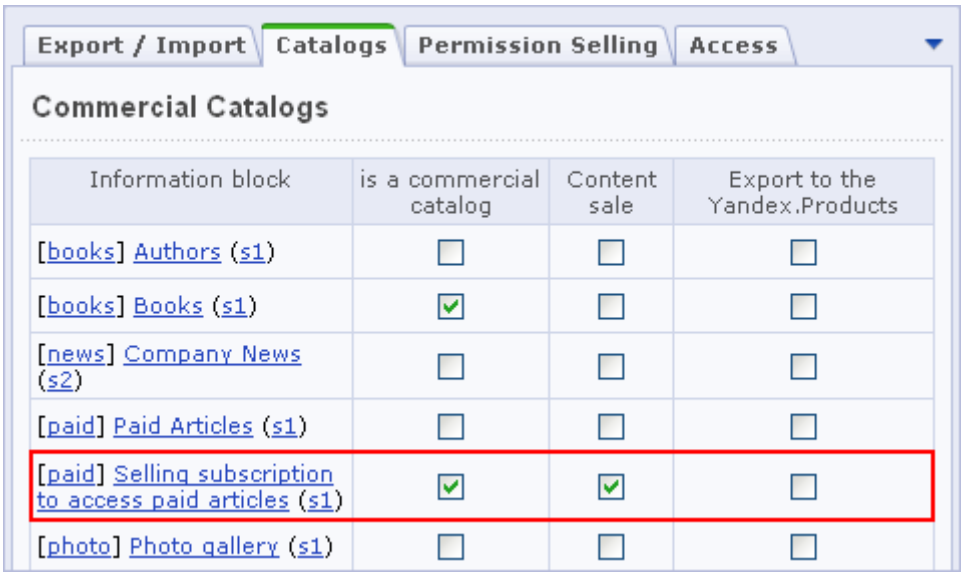


Fig. 2.7. Switching the information block to the content selling mode

- Apply changes by clicking **Save**.

Adding Elements to the Catalog

Now that we have made all the preparations, we can add elements (which are essentially the sale items) to the **Selling subscription to access paid articles** information block.

- Open the information block elements page: *Content* > *Paid Content* > *Selling subscription to access paid articles*.
- Click **Add element** on the context toolbar to open the element creation form (fig. 2.8). Note that this form now contains the **Commercial catalog** section because we have configured the **Selling subscription to access paid articles** information block as a content selling commercial catalog.

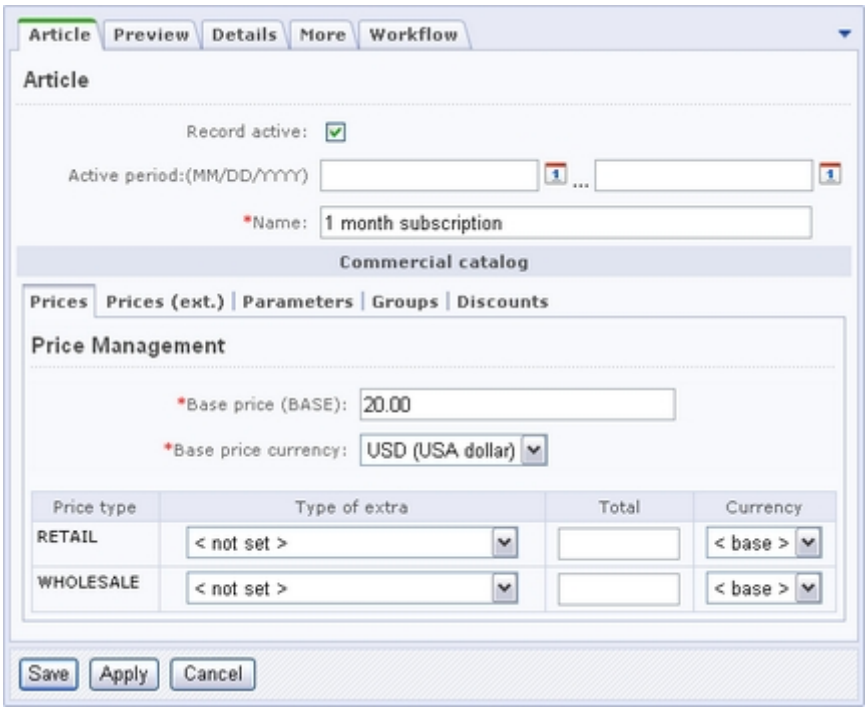


Fig. 2.8. Creating the article subscription

- Specify the subscription name (e.g. **1 month subscription**) and the base price. Select the base price currency (fig. 2.8).
- Scroll to the **Commercial catalog** section and click the **Prices (etx.)** tab (fig. 2.9).
- Fill in the fields such that the discount becomes active for subscriptions over 6 months (fig. 2.9).

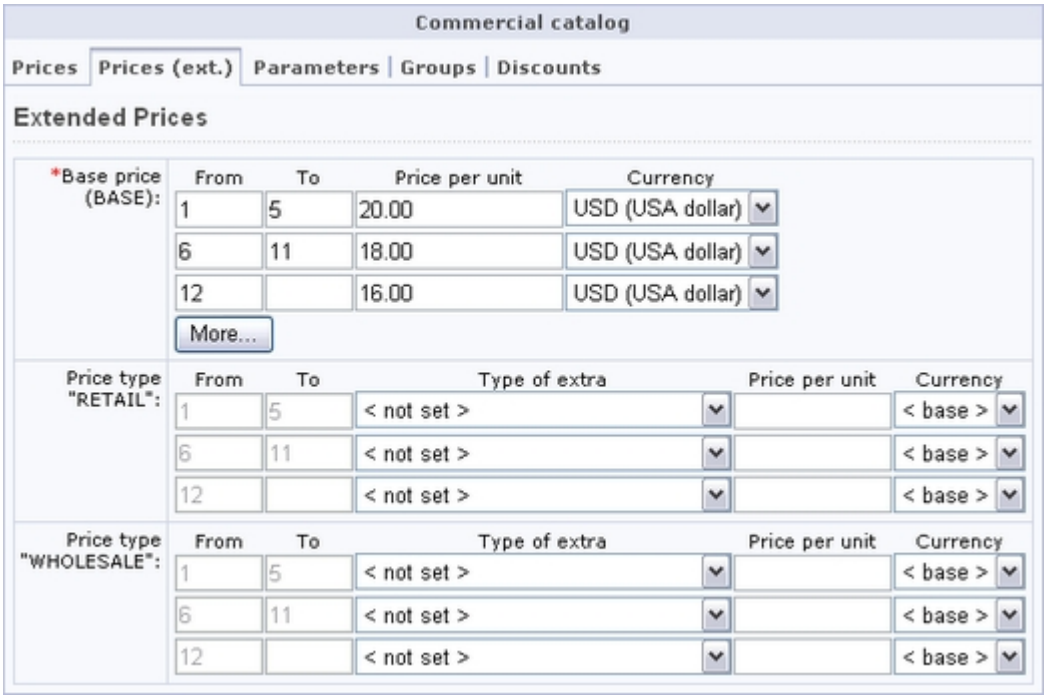


Fig. 2.9. Creating the subscription discount

Note! *The types of prices and discounts/mark-ups have to be configured in the* ***Commercial catalog*** *module. To set up currencies, use the* ***Currency*** *module.*

- Open the **Parameters** tab to specify the subscription parameters (fig. 2.10).

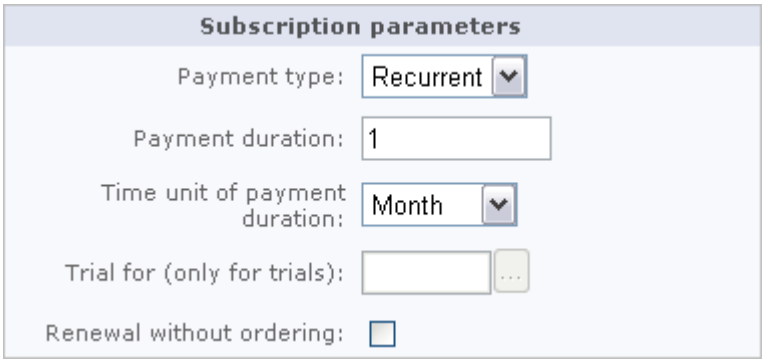


Fig. 2.10. Subscription parameters

Here, set the desired subscription parameters in the control group.

- Choose the required **Payment type**:
- 1) **One-time**: specifies that a customer buys a product item only once. No further actions on the order will take place.
- 2) **Recurrent**: a customer will be billed for the subscription renewal upon expiration.
- 3) **Trial** specifies that a customer buys a trial version (e.g. trial access). When the trial period expires, a customer will be suggested to purchase the full version of a product.
- The **Payment duration** field specifies the period of time on expiry of which the system will bill a customer again. This field should be filled for the **Recurrent** and **Trial** payment types.
- The **Time unit of payment duration** field defines the time unit used to measure the payment duration (month, day, hour etc.)
- If you have chosen a trial as the payment type, specify the full version in the **Trial for** field. When the trial period expires, a customer will be asked to purchase the specified product (full version).
- **Renewal without ordering**: If you have chosen the **Recurrent** payment type, enabling this option will calculate the total amount of order when renewing the subscription; however, no order record will not be created in the database. This option may be useful if small regular charges are to be drawn off the user internal account.

- Now click the **Groups** tab (fig. 2.11). Here you will define a user group to which a user will be added whenever they buy the subscription. If you sell a time-limited subscription, set the subscription duration in the **Active period** field. When the specified period expires, a customer will be deleted from the group.

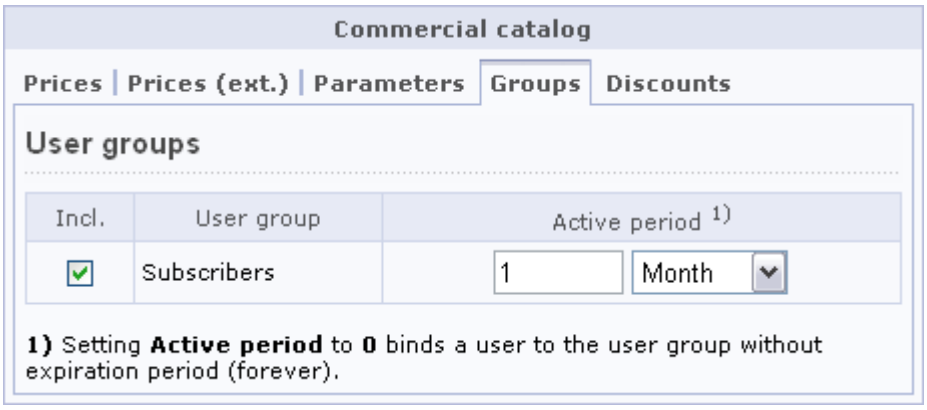
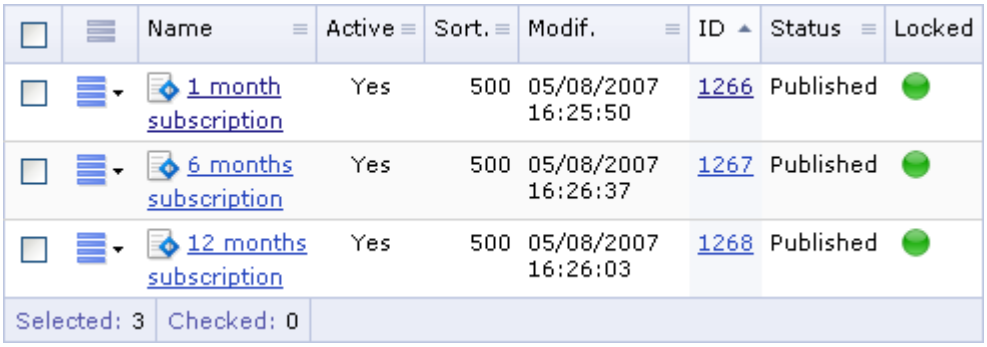


Fig. 2.11. Defining a user group allowed to access paid content

In this case, you can omit the preview and the detailed description: the subscription title will be perfectly informative. To get the detailed information about the creation of catalog items, please refer to the online help section.

▶ Save the subscription by clicking **Save**.

Repeat these steps to add the subscriptions for 6 and 12 months. Eventually, the **Selling subscription to access paid articles** information block will include the following elements:



Name	Active	Sort.	Modif.	ID	Status	Locked
1 month subscription	Yes	500	05/08/2007 16:25:50	1266	Published	
6 months subscription	Yes	500	05/08/2007 16:26:37	1267	Published	
12 months subscription	Yes	500	05/08/2007 16:26:03	1268	Published	

Selected: 3 Checked: 0

Fig. 2.12. Elements of the "Selling subscription to access paid articles" information block

Publishing Paid Articles

Elements of the **Paid Articles** information block can be easily displayed in the public section by adding visual components of the **Information Blocks** module to a page in the visual editor.

The following pages must be created to display paid articles:

- the articles page;
- the full article view page.

Creating the Articles Page

▶ Open the **/e-store/paid/** folder in the site explorer.

> ⚠ ***Note!*** *You must create this folder if it does not exist. You can get the detailed information about the creation of folders and sections in the online help.*

▶ Now click **New file** on the context toolbar to open the file creation form (the visual editor).

▶ Find the **List of news** component in the components pane as shown below, and drag and drop it on the page (fig. 3.1).

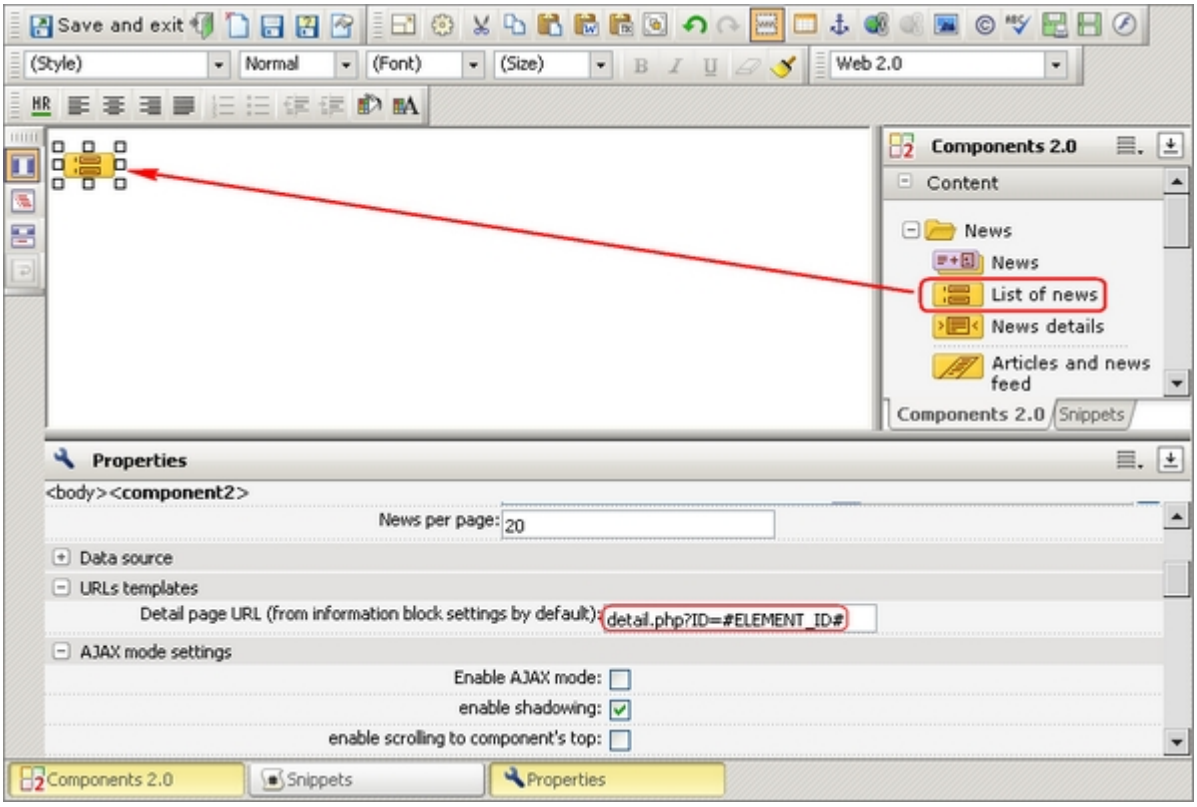


Fig. 3.1. Adding the news component

The **List of news** component displays the headlines of all the information block elements (news). The headlines are rendered as links to the news details page, regardless of the current user's permissions.

- In the component property inspector, specify **Paid Content** as the information block type and **Paid Articles** as the information block code. Set the details page URL to **detail.php** (fig. 3.1). We shall consider the creation of this page below.
- Click **Save as…** The file save dialog will open (fig. 3.2).

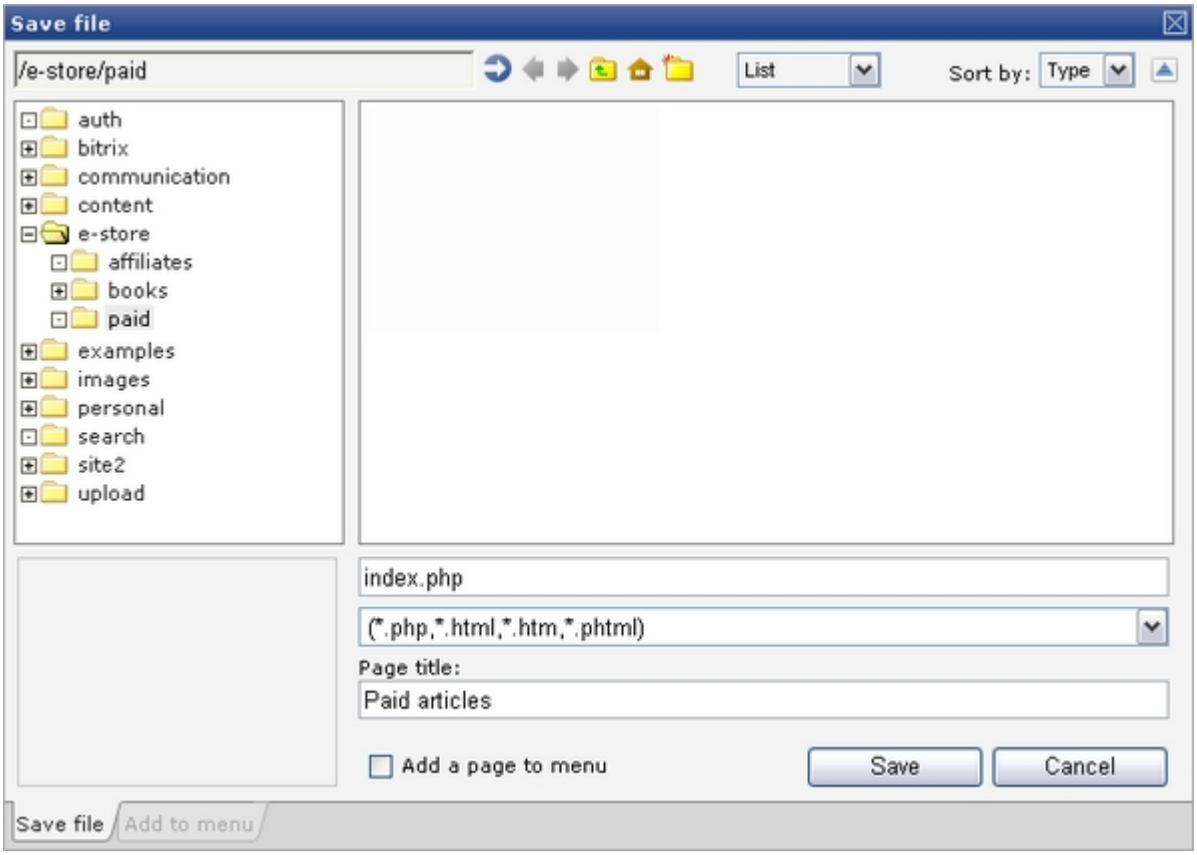


Fig. 3.2. File save gialog

- Type **index.php** in the file name field.
- Set the page title. It will be displayed in the page body in the public section.
- Click **Save** to save the page.

Creating the Full Article View Page

To display the full text of an information block element (news), we shall use the **News details** component.

- Click **New file** in the same folder (**/e-store/paid/**) to create a new page.
- Add the **News details** component to page (fig. 3.3).

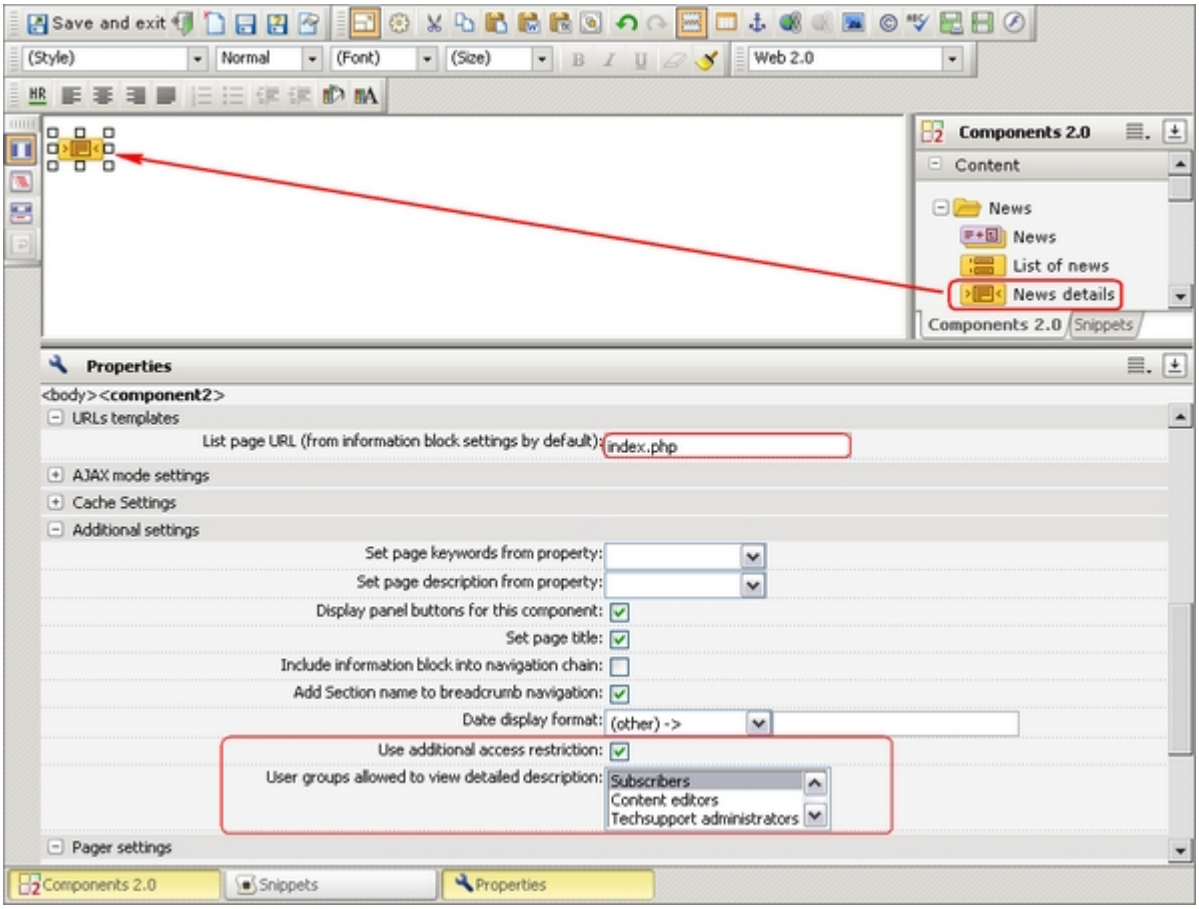


Fig. 3.3. Adding the "News details" component

- In the component properties, specify **Paid Content** as the information block type, and **Paid Articles** as the information block code. Set the articles page path (**List page URL**) to **index.php**.
- Mark the **Set page title** option. This will set the page title to the name of a current article.

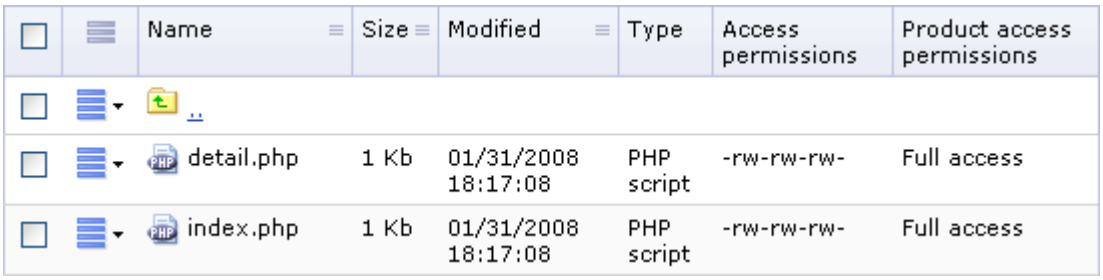
Now we have to configure the following parameters to allow only the members of the **Subscribers** user group to view full articles (which is the paid content).

- Mark the **Use additional access restrictions** option. A list of the user groups will appear below.
- Select **Subscribers** in this list (рис. 3.3).
- Save the page under the name of **detail.php**.

Configuring Access Permissions For Selling

Now we have to make some amendments to allow only members of the Subscribers user group to access the full text of articles (in fact, the **detail.php** page). We shall use **Site Explorer** to configure the access permissions.

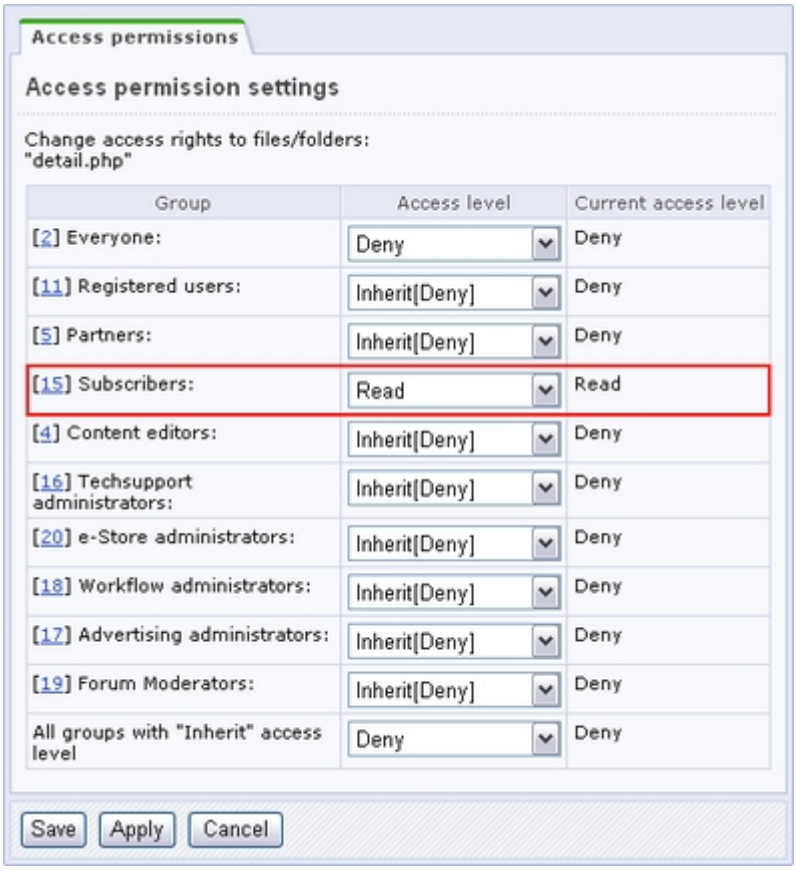
- In Control Panel, open *Content* > *Site explorer* > *Files and folders* > *e-store* > *paid*. A list of files will be displayed:



		Name	Size	Modified	Type	Access permissions	Product access permissions
		..					
		detail.php	1 Kb	01/31/2008 18:17:08	PHP script	-rw-rw-rw-	Full access
		index.php	1 Kb	01/31/2008 18:17:08	PHP script	-rw-rw-rw-	Full access

Fig. 4.1. Files in the paid content area

- Click the action menu icon beside the **detail.php** file and select the **Access** command in the menu. This will open the access management form (fig. 4.2).



Access permissions

Access permission settings

Change access rights to files/folders: "detail.php"

Group	Access level	Current access level
[2] Everyone:	Deny	Deny
[11] Registered users:	Inherit[Deny]	Deny
[5] Partners:	Inherit[Deny]	Deny
[15] Subscribers:	Read	Read
[4] Content editors:	Inherit[Deny]	Deny
[16] Techsupport administrators:	Inherit[Deny]	Deny
[20] e-Store administrators:	Inherit[Deny]	Deny
[18] Workflow administrators:	Inherit[Deny]	Deny
[17] Advertising administrators:	Inherit[Deny]	Deny
[19] Forum Moderators:	Inherit[Deny]	Deny
All groups with "Inherit" access level	Deny	Deny

Save Apply Cancel

Fig. 4.2. Access permission management

- Assign the **Read** access permission for the **Subscribers** user group. To close access to full articles for other user groups, set their access level to **Deny**.
- Save changes.

- In order to enable selling access to the paid content, the settings of the **Commercial Catalog** module should be altered as well.
- Open the **Commercial Catalog** module settings page: *Settings* > *System settings* > *Module settings* > *Commercial Catalog*.
- Click the **Permission Selling** tab and check the option beside the **Subscribers** user group (fig. 4.3).

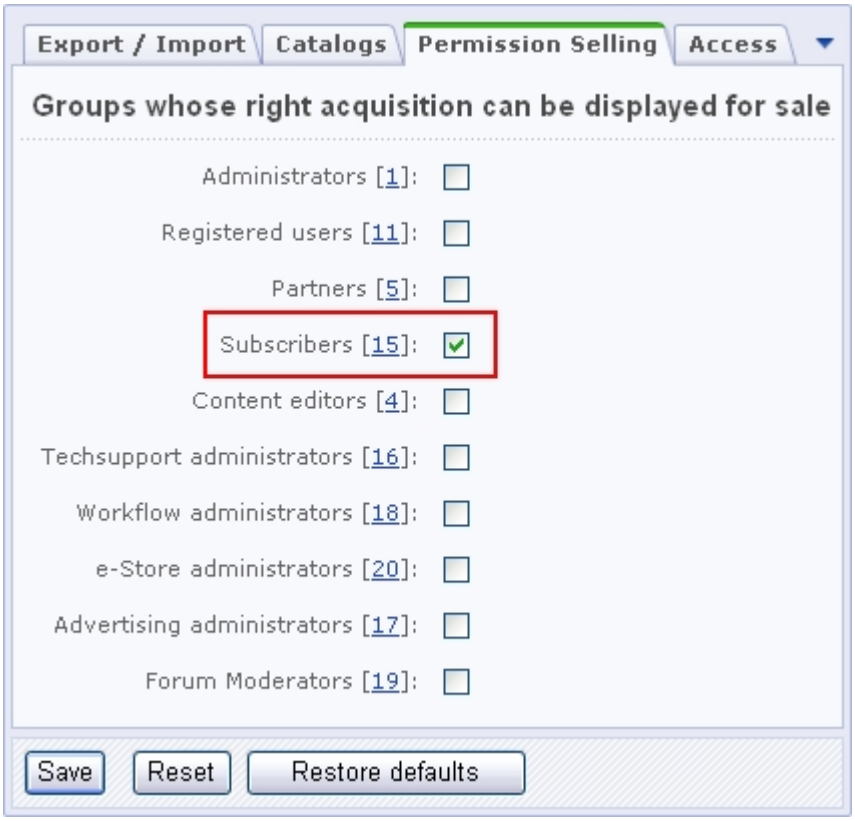


Fig. 4.3. Enabling to sell user group permissions

- Click **Save**.

Publishing the Subscription Catalog

In order to enable users subscribe for paid content, we have to display the subscription catalog in the public section. For example, the catalog can be published in an include area of the **Paid Content** section (**/e-store/paid/**):

- Open Content > Site Explorer > Files and Folders > e-store > paid in Control Panel.
- Click the **New File** button on the context toolbar to open the new file creation form.
- Select the **Include area for section** template. (If the visual editor opened immediately in fullscreen mode and you do not see the template selection field, click (**Fullscreen**) on the editor toolbar to revert to normal mode).
- In the visual editor, add the **Section elements** component to the page. It displays elements of a catalog section along with the specified properties and prices (fig. 5.1).

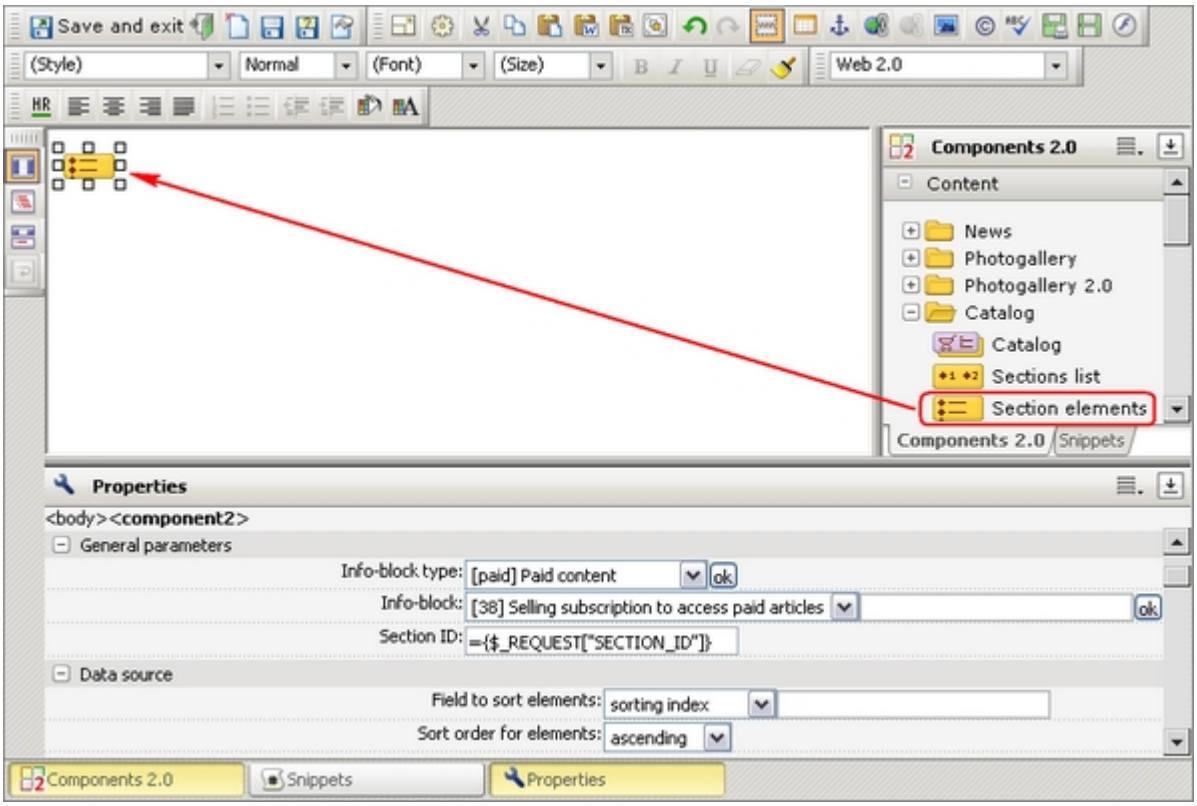


Fig. 5.1. The "Section elements" component

- Select the **Paid Content** information block type and click **OK** beside. Then, select the **Selling subscription to access paid articles** information block as the source of information.
- Now we would also want to show a shopping cart link below the subscriptions. To do so, add the **Link to basket** component. (fig. 5.2). It shows the product items currently in basket and a customer cabinet link.

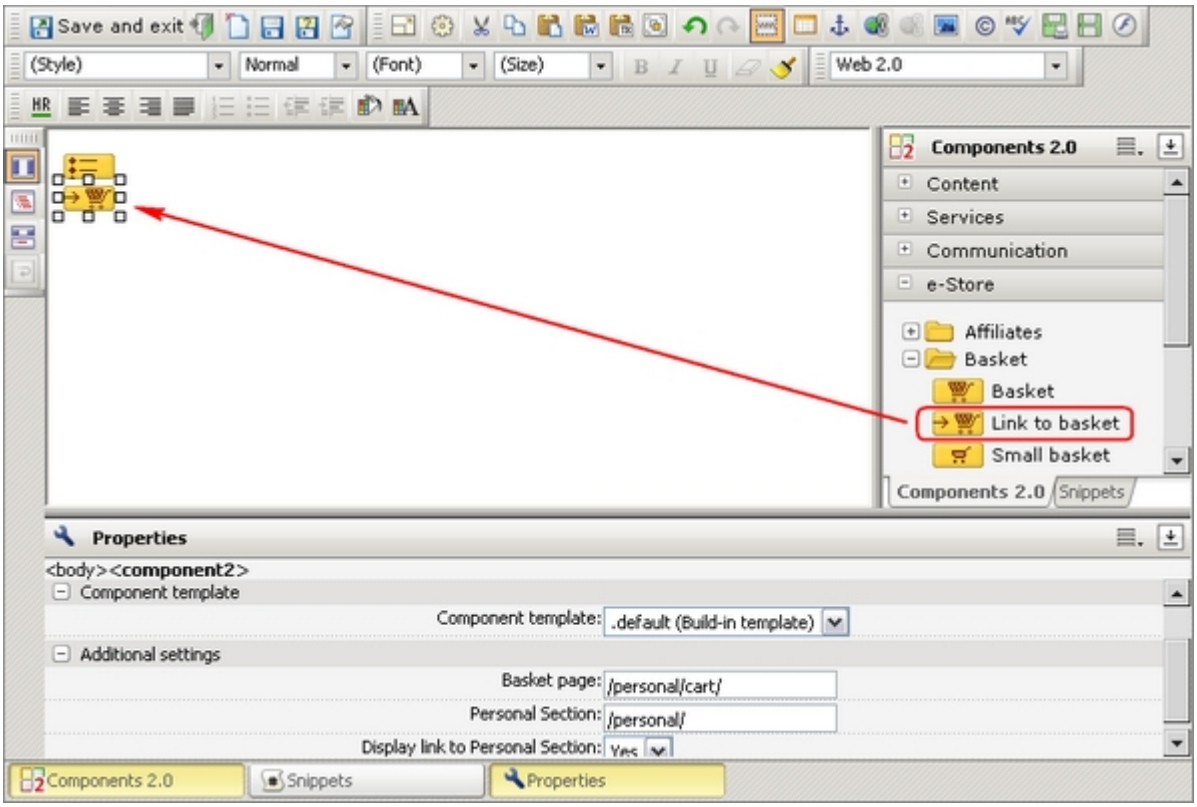


Fig. 5.2. Adding the "Link to basket" component

- Save the file as **sect_inc.php**.

After we have made the above described modifications, the index page of the **Paid Content** section would look as the following (fig. 5.3):

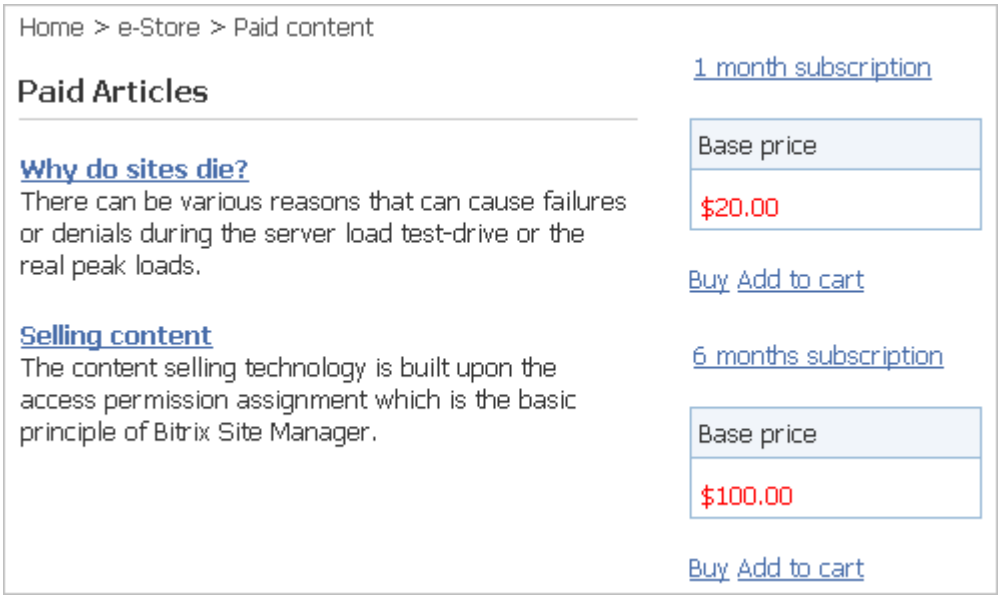


Fig. 5.3. The section index page

Members of the **Subscribers** group can view the article details page (fig. 5.4). Other visitors will see the “Access denied” message and the authorization form when trying to view this page.

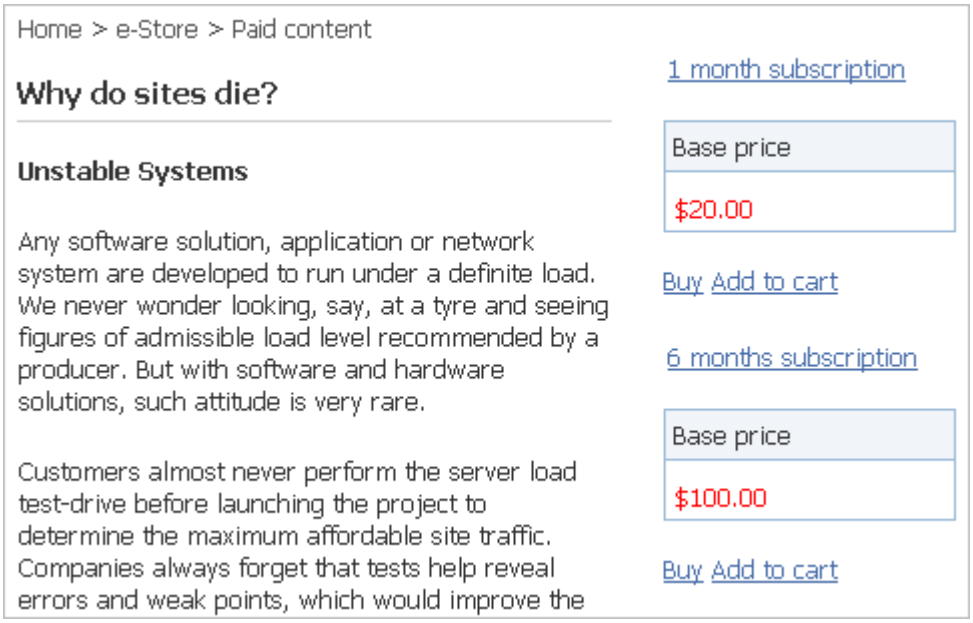


Fig. 5.4. The article details page

The section include area shows the subscription catalog items on all **Paid Content** pages.

Configuring the Web Store

Selling and receiving payments for the content are entirely under control of the **e-Store** module. We shall configure the parameters of these operations in the e-Store forms.

Note! *Full configuration of the e-Store module (payer types, payment systems, credit cards etc.) is covered in the System Administration course. This tutorial only explains the configuration of permissions for orders.*

Permissions for Orders

In this example, we shall entitle users having the **Manage Orders** access level to handle orders for content. This access level enables a person to process orders but denies any management access to the **e-Store** module.

- Open the **e-Store** module configuration page: *Settings* > *System settings* > *Module settings* > *e-Store*.
- Click the Order permissions tab.
- Select a user group whose members will be permitted to manage orders. For example, **e-Store administrators**.

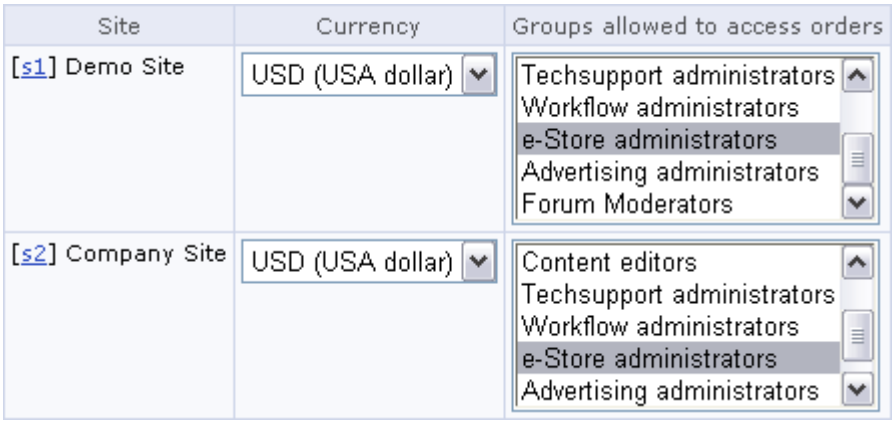


Fig. 6.1. Assigning permissions to user groups

Note! *You must create the* ***e-Store administrators*** *group prior to giving it the access to orders. Assign a* ***Manage orders*** *access right to this user group in the user group settings form*
.

Note! *For each site, you can select an individual user group enabled to access orders.*

- Click **Save**.

In order to inform clients and the web store staff about a current order state, the system provides order statuses. The following two types of statuses exist.

- **Order states** are the predefined entities that reflect a current processing status: **Paid**, **Canceled**, **Delivery**.

- **Informational states** reflect stages at which an order can be during processing. You can view the existing informational states on the **Order statuses** page. The system contains the two preset frontier states that cannot be deleted: **Accepted** and **Delivered**. However, you can *create* as many custom states as you want. For example: **Processing**, **Shipped** etc.

Eventually, the users who are members of the **e-Store administrators** group will take control of the orders. Hence, we have to configure their access rights for different order statuses.

▶ Open the **Order Statuses** page: *e-Store* > *e-Store settings* > *Statuses*.

For each status, perform the following actions to configure it.

▶ Open the status editing form (click on the action menu and select **Modify status settings**).

▶ Scroll to the **Access permissions** section (fig. 6.2).

▶ Activate the options that are to be available to members of the **e-Store administrators** user group when an order is in this status (fig. 6.2).

Access permissions:								
User group	Order access permissions							
	View	Cancellation flag	Delivery flag	Payment flag	Move to this status	Move from this status	Edit	Delete
e-Store administrators	☑	☑	☑	☑	☑	☑	☑	☑

Fig. 6.2. Status permissions

▶ Click **Save**.

After you have finished the configuration, members of the **e-Store administrators** user group would be able to manage orders in any status.

Setting Up a Client's Personal Area

The **e-Store** visual components give us the ultimate power to create pages where customers can view the basket items, order details, internal account, profiles; view and manage parameters of a recurring subscription payment etc. You can create pages in the visual HTML editor by adding components and tuning their parameters.

Note. *You can find examples of personal area pages in /bitrix/modules/sale/install/public/.*

Generally, the customers should be able to open the basket page by clicking a homonymous link, or the **Buy** button beside the product description. The basket page is the initial point in the order completion sequence, which is initiated by clicking **Check out**.

The Ordering Procedure

Setting up the order completion page is simple; follow the steps below.

- Create a new page in a required site section.
- Add the **Ordering Procedure** component to the page (fig. 7.1).

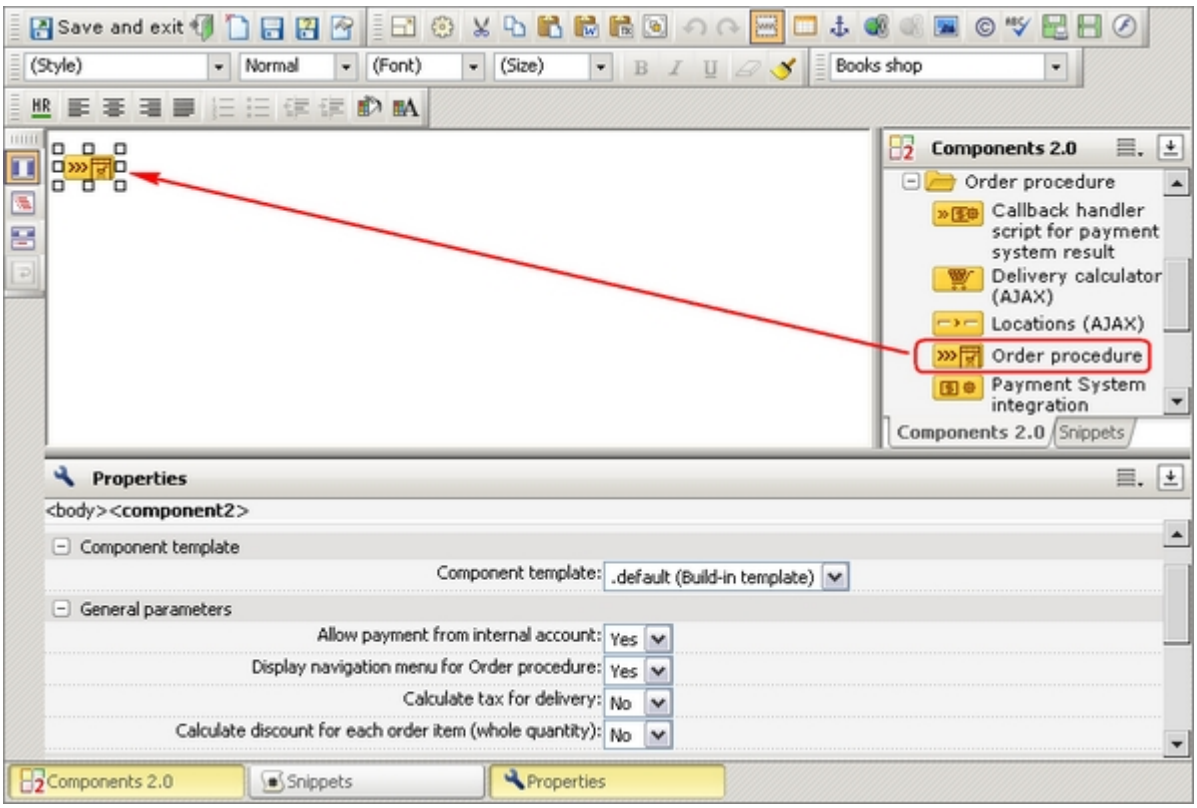


Fig. 7.1. Adding the "Ordering Procedure" component

- Configure the component parameters as required.
- Save the page.

Important! *Remember to specify the path to this page in the* ***Basket*** *component parameters.*

Eventually, we have the order check-out page in the public section:

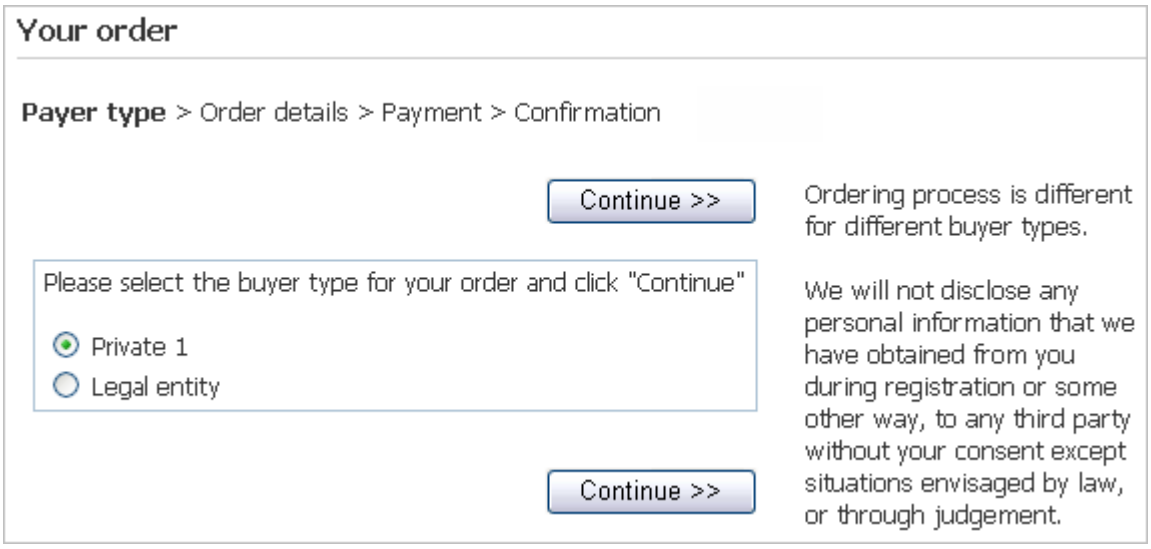


Fig. 7.2. The check-out page

Managing Orders

After an order has been placed, a corresponding record appears in the orders page: *e-Store > Orders* (fig. 8.1).

		ID	Paid	Status	Sum	Buyer	Payment system	Items
		#4 from 04/09/2008 16:43:11	Yes 04/09/2008 16:55:21 [1] Administrator (admin)	[N] Accepted 04/09/2008 16:43:11	$20.00	[2] Rick Astley (rastley)	[15] PayPal	[1266] 1 month subscription (1.00 pcs.)
		#3 from 04/09/2008 16:39:31	No	[N] Accepted 04/09/2008 16:39:31	$45.00	[6] John Brown (brown)	[9] Cash	[1311] A Sending Of Dragons (1.00 pcs.)

Fig. 8.1. The orders page

The following user groups are permitted to manage orders:

- the site administrators;
- the web store administrators;
- any user group that is allowed to access orders in a certain status.

The only reason for the product delivery (which essentially means adding a customer to an appropriate user group) is changing the order status to **Delivery** (see fig. 8.2). The status can be changed in the order details page which can be opened by selecting **View order details** in the action menu.

Fig. 8.2. Changing the order status

An order can be moved to the **Paid** status:

- **automatically** if a payment system chosen by a client is able to return the processing result immediately;
- **manually** (upon receipt of money): by changing the status from **Not paid** to **Paid** in the order details form (fig. 8.3).

Fig. 8.3. Order payment

The **Pay from internal account** option can be used on the stipulation that the client's internal account has enough money and they can be withdrawn for payment.

⚠ ***Note!*** *All transactions occurring during payment are registered by the system. You can view the transactions here: e-Store > Customers accounts > Transaction.*