User Manual

xFlow v5.x

Created by:

Envex Developments Inc.
http://www.envex.com/

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1.) Introduction

xFlow v5.x is the world's leading online membership management software program. Powered by MySQL or PostgreSQL, xFlow offers outstanding power, flexibility, and durability. A wealth of different features are available, allowing you to setup your business in almost any way imaginable.

This manual will step you through all functions of xFlow. Everything from how to setup your program for the first time, to paying commissions, to generating reports is included. This manual is meant for customers of xFlow, and assumes the software has already been installed on your web server.

2.) Important Notes

This section provides some simple, but important notes about this manual. If this is your first time using xFlow, it is required that you read through the following chapters, as they help explain how to setup your self replicating web site, and the software:

[Chapter 3. Self Replicating Web Sites](#)

[Chapter 4. Getting Started](#)

If you are still having difficulties setting up your program, after reading the two above chapters, please consult the Knowledge Base at http://kbase.envex.com/

2.1 Requirements

Your web server must meet the following requirements, in order to use xFlow:

- UNIX / LINUX web server
- Perl 5
- Telnet / SSH access
- Access to one (1) clean mySQL or PostgreSQL database
- 1 MB of web space for the script files
- Crontab privileges
- Ability to set the DefaultType for Apache
- Ability to execute CGI scripts outside of the /cgi-bin/
- OpenSSL
- gcc Compiler

The server must also either, allow Perl modules to be installed locally, or already have the following Perl modules installed:

- IO::Socket
- Digest::MD5
- Crypt::SSLeay (Net::SSL)
- DBI
- DBD::mysql or DBD::Pg (depending on database used)

3.) Self Replicating Web Sites

This section explains how to format your self replicating web site, for use with xFlow. Generally, every type of self replicating web site can be used.

3.1 The Basics

Every type of web site is fully supported by xFlow, except those which use server side programming languages. Your self replicating web site is simply a normal web site, and can contain an unlimited number of web pages / directories, frames, Javascript, and so on. You can use basically any HTML editor available to create your self replicating web site.

However, your self replicating web site can not contain any server side programming languages, such as PHP, Coldfusion, CGI, ASP, Java, etc. This is because the self replicating web pages themselves are server side generated, and you can't have a server side generated page, execute server side scripts. However, you can use client side programming languages such as Javascript and DHTML.

Your member's self replicating web sites would have a URL such as: http://www.domain.com/member/username. There is no way to remove the 'member' from the URL, but you can name it whatever you wish. For more information on this, please consult the Knowledge Base.

3.2 Personalize Your Web Site

You'll most likely want to personalize your self replicating web site with your member's personal information. To do this, you'll need to add merge fields into your web pages. A merge field is simply any of the fields in your member database, surrounded with **~** marks.

For example, if one of the fields in your member database is **first_name**, you would enter the merge field **~first_name~** anywhere in your web pages. This merge field will then be replaced with the member's first name. Merge fields can be placed anywhere in your web pages you would like.

3.3 Image Links

All image links in your web pages must be absolute URLs, and not relative URLs. You should only have one set of images on your web server. Images should never be uploaded to your self replicating web site through the Admin Control Panel. Instead, use conventional means to upload the images to your server, and for example, store them in the /images/ directory of your server.

For example, if you currently have an image link like:

<img src="images/title.gif">

That needs to be changed to:

<img src="http://www.domain.com/images/title.gif">

All images in your web pages must be changed to absolute URLs as explained above, or else they will not show up correctly on your self replicating web site.

3.4 HTML Links

All HTML links must also be formatted in a certain way, so people stay on a member's self replicating web site, to ensure your members always get proper credit for new signups. All HTML links must be absolute URLs.

For example, if you have an HTML link which looks like:

<a href="page.html">

That needs to be changed to:

<a href="http://www.domain.com/members/~username~/page.html">

When somebody visits the web page, the ~username~ merge field will be replaced with the member's username. This ensures nobody will ever stray from the member's self replicating web site, and the member will always receive full credit for all signups.

3.5 Member's Only Area

There's a good chance you will want to upload additional web pages to your Member's Only Area, which can only be viewed by members, after they've logged into the Member's Only Area. The web pages can be personalized using the same merge fields as described in *3.2 Personalize Your Web Site*. To link to a page within the Member's Only Area, you will place a link such as:

index.cgi?~authtext~&page=page.html

For example, if you uploaded a web page named *program.html*, the link would be:

index.cgi?~authtext~&page=program.html

The above link ensures that the page 'program.html' can only be viewed by members who are logged into the Member's Only Area.

3.6 Sub-domain Replication

xFlow fully supports sub-domain replication, allowing the URLs to member's self replicating web sites to be http://USERNAME.domain.com/. In order to use this feature, the domain name on your web server must be configured a certain way. You will need to contact your server administrator, and ensure the following actions have taken place:

1. Wildcard DNS must be enabled for your domain. The allows *ANYTHING.domain.com* to resolve in your web browser

2. A new VirtualHost directive must be created for your domain, which looks something like:

```
<VirtualHost 64.21.76.23:80>
    ServerAlias *.domain.com
    DocumentRoot /home/username/public_html/show.cgi
</VirtualHost>
```

   The virtual host must redirect all requests to *ANYTHING.domain.com* to the show.cgi script on your server, as shown above.

3. Go to the *Setup->General Settings* menu of your Admin Control Panel, and click on the *"System Settings"* submit button at the top of the page. At the bottom of the page, change the field asking for the URL to the /members/ directory to:

   http://~username~.domain.com/

   The ~username~ merge field must be present in the URL, which informs the software sub-domain replication is being used.

If you have successfully completed the above three steps, then sub-domain replication will be activate on your installation. The URL to all member's self replicating web sites will now be located at http://USERNAME.domain.com/

4.) Getting Started

This chapter assumes xFlow has already been installed on your server, and will step you through exactly how to setup the program to meet your specific needs. Everything you need to complete in order to start your business is explained in this chapter.

4.1 Quick Setup Guide

If you are experienced with xFlow, below shows a quick list of everything that needs to be completed for setup:

1. Run First Time Setup *(Setup->First Time Setup)*
2. Create web sites *(Setup->Manage Web Site)*
3. Create program structures *(Setup->Program Settings)*
4. Create member types *(Setup->Member Settings)*
5. Set program constraints *(Setup->Program Settings)*
6. Create payment methods *(Setup->Payment Settings)*
7. Create membership fees *(Transaction->Transaction Settings)*
8. Define compensation plan *(Transaction->Transaction Settings)*
9. Create upgrade fees *(Transaction->Transaction Settings)*
10. Set member privileges *(Setup->Privilege Settings)*
11. Create notifications *(Communicate->Notification Settings)*
12. Generate needed HTML forms *(Setup->Generate HTML Forms)*
13. Upload self replicating web sites *(Setup->Manage Web Site)*
14. Create your first member *(Database->Create New Member)*

4.2 First Time Setup

After you have created your first administrator, and logged into your Admin Control Panel, you must run First Time Setup. Go to the *Setup->First Time Setup* menu and complete the questions displayed, which are explained throughout this section.

4.2.1 Administrator Information

This section asks for the administrator's name and e-mail address. This is basically just the name of your business, and your businesses main e-mail address. This e-mail address is used for notifying the administrator about overall software maintenance (i.e. software upgrades, automated backups).

4.2.2 General Settings

1.) Which date format would you like all dates shown in?

Three different date formats are supported by xFlow. This is the format, which all dates will be displayed in, throughout the software.

2.) Would you like every member to receive their own personal hit tracker? The software will log all traffic to their self replicating web site, which can later be viewed through the Member's Only Area.

If Yes, the xFlow will keep track of all traffic each member's self replicating web site receives. Members can then view detailed statistics on all traffic through the Member's Only Area. This feature does not use any additional server resources, however, can take up a large amount of disk space on your server.

3.) When the software sends an e-mail message, would you like it to automatically wrap lines that are over 60 characters long?

Generally, this should always be set to Yes. This feature will automatically word wrap all e-mail messages, to ensure that people who do not use e-mail clients which support word wrap, can easily read the e-mail message.

4.) When you're viewing a member's downline, how many downline members would you like to display per page?

When viewing a member's downline, a table is displayed listing all members in that downline level. This question allows you to specify the number of members displayed in the table, per page. You can adjust this number anytime through the *Setup->General Settings* menu.

5.) Which currency sign would you like displayed in front of all amounts?

Basically, exactly like the question asks. The character you place in this field will be displayed throughout the software in front of all currency amounts.

6.) Please enter the home page of your self replicating web site(s)? Please note, this should only be the name of a web page, and not a full URL.

This is the home / default page of your self replicating web site. When someone views a member's self replicating web site, without specifying a web page, such as http://www.domain.com/members/jsmith/, xFlow will automatically display the home page you specify.

7.) Enter the username of a default member for the software. When someone views a self replicating web site, for which the member doesn't exist, the software will display the web site using this members information. Leave this field blank if you do not want to assign a default member.

Enter the username of your company member *(eg. admin, company, etc.)*. This way, when someone views a member's self replicating web site who doesn't exist, instead of receiving an error message, the company member's self replicating web site will be displayed.

8.) When someone visits a member's self replicating web site without a trailing slash in the URL, would you like the software to automatically redirect the visitor back to the same web site, but with the trailing slash? This helps ensure your links stay intact.

Depending on the design of your web site, various images and links may not work correctly if this option is set to No, and people view a member's web site without a trailing slash *(eg. http://www.domain.com/members/username)*. If Yes, the software will automatically redirect the visitor to the proper URL with the trailing list, helping ensure all images and links always work for all visitors.

9.) Would you like to activate sub-account features? This means each member can own several memberships, and manage them all through their one account.

If Yes, every time you create a new member through the Admin Control Panel you will have the option of specifying the owner of the account. Through the Member's Only Area, the member will be able to manage all sub-accounts assigned to them.

4.2.3 Newuser Form Settings

1.) When new members join, would you like the software to automatically force their username to lowercase?

If Yes, every time a new member joins from the public web site, their username will be automatically converted to lowercase. Please note, usernames are case sensitive, so 'jsmith' and 'JSmith' are two different usernames. This feature can help you manage your member database easier.

2.) Would you like a random six character password generated for all new members?

If Yes, every time a new member joins from a self replicated web site, a random six character password will be generated for them, instead of allowing them to specify their own password. This helps make sure all member's e-mail addresses are valid, because they must have their password e-mailed to them.

3.) Would you like the software to place a cookie in visitor's browsers, to track which member's self replicating web site they originally visited? This way, if someone joins at a later date, the original member will get credit, regardless of what web site they joined from.

If yes, every time someone visits a member's self replicating web site, a cookie will be placed in their web browser, with information on which member's web site they visited. If that member joins at a later date, they will be placed under the original member no matter what.

4.) When a new member joins, would you like them to first confirm their contact information before being created? If yes, when a new member joins they'll first be shown a page containing the information they previously submitted. Once they have confirmed this information, their membership will be created.

This question is fairly straight forward, and if yes, when a new member joins they will be prompted to confirm all information they just entered, instead of having their account immediately created.

4.2.4 Database Information

This section contains one field, asking for the number of fields you would like your member database to contain. Your member database stores all members' personal information, such as their name, address, e-mail address, password, and so on. On a piece of paper, write down all information you would like stored in your member database, and enter the number of fields.

Please note, the ID Number and Username fields are automatically included by the software. You must also have a minimum of three fields (Name, E-mail, Password). You can change the number of fields at anytime through the *Setup->General Settings* menu.

4.2.5 Password Authentication Settings

xFlow supports two different authentication schemes. The HTML login form requires everyone to login by entering their username and password into a HTML form. The authentication method was developed by Envex Developments, and is very secure. The other form of authentication, NCSA htaccess, does not use an HTML form. Instead, a small dialog box will pop up, asking for the username and password.

There is no real difference in the security between the two authentication schemes, and the choice is only for personal preference. The first two questions of this section, simply ask which authentication method you would like to use for the Member's Only Area and Admin Control Panel.

The last two questions of this section ask for the number of minutes to automatically log people out. Please note, xFlow can only log people out if you're using HTML login form for an authentication method.

4.2.6 Transaction Settings

1.) After how many days would you like pending transactions to automatically expire?

Pending transactions are transactions which are still awaiting to be processed. This usually means either, a deposit made through a third party payment processor (eg. PayPal, 2CheckOut) which the member still has to pay, or a commission payout that has not yet been sent. If a pending transaction has been in the database longer than specified, it will be automatically declined.

2.) How much of an overdraft would you like to allow for each member's account? This means, the balance of each account will be able to go into the negative this much, before being physically charged.

Depending on the transaction, xFlow will withdraw the needed funds from the member's existing balance. However, if there are not enough funds in the member's account, xFlow will only physically charge the member the difference, to bring their account back to $0.

For example, if a transaction for $20 is added, but the member only has $19.50 in their account, xFlow will physically charge the member for $0.50. Setting an overdraft will allow a member's account to go into the negative, instead of charging them small amounts such as $0.50. Once the member has reached the overdraft limit, xFlow will charge them the needed amount, to bring their account back to $0.

3.) What is the minimum amount members can deposit into their account through the Member's Only Area?

Through the Member's Only Area, members can deposit funds into their account. This will physically charge members and deposit the funds into their account. Here, you can set a minimum limit on the amount they're allowed to deposit. Setting the amount to $0 will set no limit.

4.) What is the minimum amount members can withdraw from their account, when requesting a funds withdrawal through the Member's Only Area?

Through the Member's Only Area, members can request funds to be withdrawn from their account, and be physically sent to them. Here, you can set the minimum amount they can request at one time. Setting the amount to $0 will set no limit. For further information, see Section 8.7 Pending Withdrawals.

5.) When new members first join and pay a membership fee via credit card, how would you like the initial transaction processed?

This question is only applicable is you're using a real merchant account, and accept credit cards on your web site. When a new member first joins from a self replicating web site, this question determines how to process the credit card charge. If you only authorize the first charges, you then have to manually approve all new charges through the *Transaction->Pending Deposits* menu. This allows you to check for credit card fraud.

6.) When recurring (eg. monthly) transactions are charged to a member's account, how would you like the credit card transaction processed?

Generally, you can allow the software to charge member's credit card for recurring transactions. The credit card has already been checked and approved after the first charge, so no longer needs to be checked again for fraud.

7.) When a member deletes themselves from the Member's Only Area, how would you like the software to handle all previously added commissions?

There's three different ways you can handle previously added commissions. Simply select how you would like previously added commissions handled.

8.) Would you like all new payment methods created through the Member's Only Area, require approval from the administrator (you) before becoming active?

xFlow allows members to add new payment methods (eg. credit cards) to their account through the Member's Only Area. If this question is set to Yes, all new payment methods members add must first be approved by you through the *Transaction->Pending Payment Methods* menu, before they become active on the member's account.

4.2.7 Backup Settings

1.) How often would you like your member database automatically backed up?

This question allows you to specify exactly how often you would like xFlow to automatically backup your member database. Generally, this should be left at once a day. All backup files are stored in the /cgi-bin/xflow/backup/ directory of your server. For a typical 10,000 member database the backup archives will be around 1 Megabyte in size.

2.) How many days worth of backup files would you like kept on your server? All older backup files will be automatically deleted off your server, to save disk space.

Every night at 2:00am (local server time), a script will automatically run and delete all backup files that are older than specified in this question. This helps reduce the amount of disk space that backup files take.

Remote FTP Server Info

These fields are optional, and are only required if you would like backup archives automatically uploaded to a remote FTP server. If wanted, enter the FTP login information into the provided fields. Every time the software performs a backup of the database, it will login to the FTP server provided, and upload the backup archive. This helps against severe server failures, as your backup archives will also be available on a remote server.

4.2.8 Other Settings

1.) Will you allow the software to automatically send any error messages to Envex Developments that shouldn't have occurred? This will help Envex Developments to diagnose and fix any bugs the software may contain.

All errors that shouldn't have occurred are automatically logged by the software. If this question is set to Yes, a script will automatically run every night on your server and send all error messages that occurred during the day to the Envex Developments server.

2.) Would you like the software to automatically contact the Envex Developments server every 24 hours, to check for any newly released upgrades, and automatically install them?

If yes, the software will automatically contact the Envex Developments upgrade server every night, and check for new upgrades. If any upgrades are available, they will be automatically installed on your server. This ensures you're always running the latest version of xFlow, without any manual intervention.

4.2.9 E-Mail Settings

This section only contains one question and asks for the method you would like to be used to send e-mail. Generally, this should always be set to Sendmail, unless for some reason, your web server does not have Sendmail installed. Please note, if your web server uses Exim or Qmail, you should still select Sendmail as the option, as they all work in the same way.

You should now have the first page of First Time Setup completed. Just submit the form, and continue on to the second page.

4.2.10 E-Mail Information

This section contains one question, asking for either the path to Sendmail on your server, or the host name of your SMTP server. xFlow has already tried to determine the answer for you. If you do not know the answer to this question, please contact your server administrator.

4.2.11 Database Information

This section contains one text box for each of the fields you specified for your member database on the previous page. You simply need to enter the names of all member database fields in this section. Please note, fields can not contain spaces, special characters, or digits. However, you can use the underscore "_".

Now that you've completed the second page of First Time Setup, click on the "Continue to Next Step" submit button to continue onto the third page.

4.2.12 Database Information

This section contains one table, which asks for the location of member's information in your database. The only fields which are required in this table are, *Full / First Name, E-Mail Address,* and *Password*. The rest of the fields are optional. This informs the software about which database fields correspond to the name of fields you have provided previously.

4.2.13 Newuser Form Settings

1.) Please check all fields which you would to make required on the newuser HTML form.

When a new member joins from a self replicating web site, the software will ensure all checked fields contain at least one character. If any required fields are left blank on the HTML form, an error will be given off, asking the new member to specify in the required field. This error message can be modified though the *Other->Internal Messages* menu.

2.) Please mark all fields that you would like the script to check for duplicate entries when a new member joins.

When a new member is created, xFlow will check all existing members for the marked fields, to see if any member has the same information. For example, you could check for duplicate e-mail addresses, to ensure no two members have the same e-mail address.

4.2.14 Member's Only Area Settings

xFlow allows members to edit their personal profile through the Member's Only Area. The first question in this section asks for the fields that members can edit themselves.

The second question asks if you would like to use a different set of HTML templates for each Member's Only Area. If yes, all HTML templates located inside the */xflow_data/htmlt/marea* directory will be copied over into the */xflow_data/htmlt/public/X/templates* directory for each Member's Only Area you create. This allows you to customize the HTML templates for each Member's Only Area. If no, the default set of HTML templates in the */xflow_data/htmlt/marea* directory will be used for all Member's Only Areas.

Now that the third page is completed, click on the "Continue to Next Step" submit button, to continue to the fourth and last page.

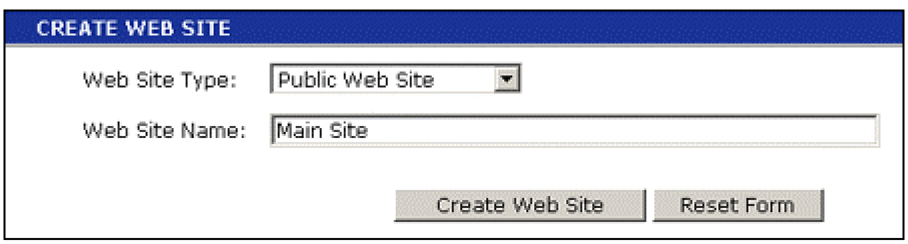
4.2.15 Downline / Upline View Information

This section allows you to specify what information is displayed when viewing a member's downline. You can have to up eight different pieces of information displayed. The tables each contain two columns, one allowing you to choose exactly what information is displayed, and the other allowing you to specify the title of the column.

That's it! You just need to submit the form, and First Time Setup will be completed!

4.3 Create Web Sites

Next, you have to create all needed web sites through the *Setup->Manage Web Site* menu. At the bottom of the page, you will see a box allowing you to create a new web site that looks like:



There are two different web sites you can create:

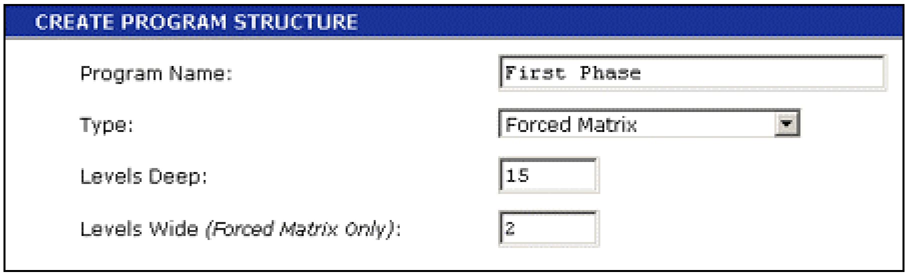
- **Public Web Site** – The member's public self replicating web site.

- **Member's Only Area** – The password protected Member's Only Area, which only active members have access to.

xFlow supports multiple web sites. For example, you can give each member type access to a different Member's Only Area, in case you would like to offer different information to each member type.

4.4 Create Program Structures

You now need to create all needed program structures for your genealogy, through the *Setup->Program Settings* menu. The second box on the page allows you to create a new program structure, and looks like:



The first section shown above asks for general information on the new program structure. Complete these questions with the following information:

Field	Description
Program Name	This can be any name you wish for the program structure, and is used throughout the software to identify the program structure.
Type	xFlow supports two different types of program structures: • **Network (unlimited width)** – A standard program structure, with no width restrictions. • **Forced Matrix –** Allows you to specify a width restriction, allowing for spillover.
Levels Deep	The number of levels deep you would like the program structure to be. This is the number of levels deep each member's personal downline will be tracked to. Due to technicalities, program structures can not be deeper than 1000 levels. By default, all program structures are unlimited depth, but the software can not track personal downlines for more than 1000 levels.
Levels Wide	This is only required if you're creating a forced matrix, and allows you to specify the width. Due to technicalities, there is no way to create a 1x matrix. All forced matrix program structures must have a width of at least 2.

X-Up Program

This section allows you to specify an X-Up program structure. Commonly referred to as an "Australian 2-Up", this allows you to specify a number of qualifying members. When a new member joins, their first X personally sponsored members will be automatically transferred to their sponsor. Once a new member has recruited the needed number of qualifying members, all future personally sponsored members will be given to them, and not their sponsor.

For example, when a new member joins a 2-Up program, the first two people to join directly under the member will be automatically transferred to the member's sponsor. After those first two, the member becomes qualified, and will receive all future recruits.

Recycling Matrix

If you're creating a forced matrix, you can specify it as a recycling matrix in this section. With a recycling matrix, when a member fills their matrix they will automatically be cycled back into the matrix with a new downline position. Members can cycle through the matrix an unlimited number of times, and can view full details on all members in each phase through the Member's Only Area.

The one question in this section asks if you would like members to follow their sponsor when they cycle back into the matrix. Every time a member cycles back into the matrix, a new downline position is created for them. This question allows you to specify whether the new downline position should be added under the member's sponsor, or under no sponsor.

Compression Type

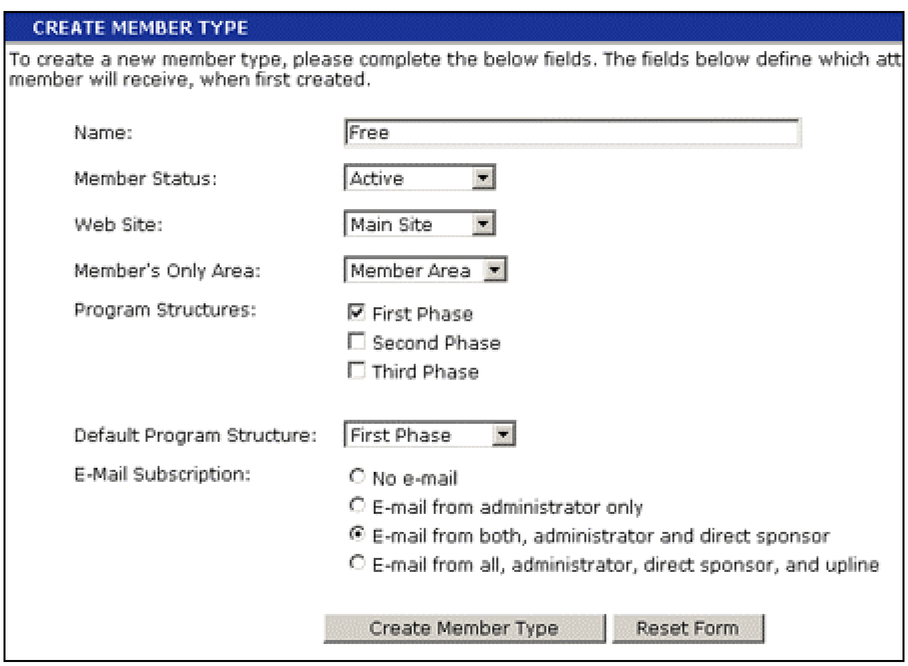
xFlow supports two compression types, which determines how the downlines are compressed when a member is deleted. If you select Full Compression, the software will automatically compress the downline when a member is deleted, and move the member's downline up. This ensures no blank spaces are ever left in the downlines.

If you select No Compression, when a member is deleted, no downlines will change. Instead, blank spaces will be left in the program structure, where the member used to be.

4.5 Create Member Types

Once you have created all needed program structures, you need to create your member types. This allows you to offer different levels of membership, and easily group members. Each member type can have a different compensation plan, self replicating web site, Member's Only Area, be charged different membership fees, and so on.

To start, go to the *Setup->Member Settings* menu of the Admin Control Panel. The second section on the web page looks like this:



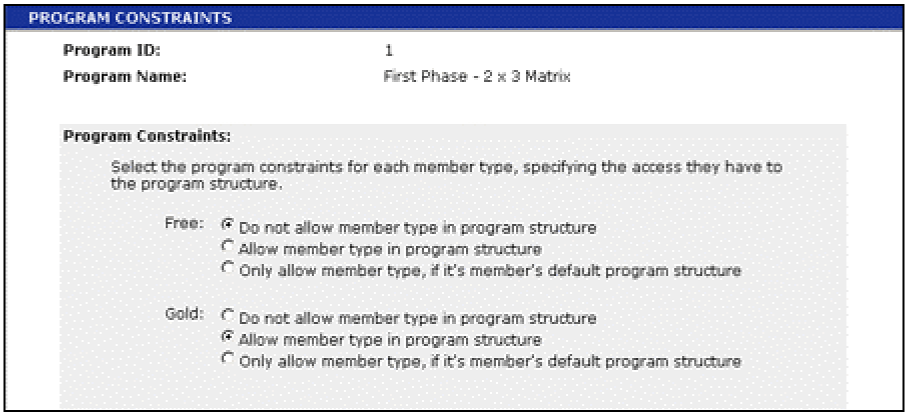
Complete this section with the following values:

Field	Description
Name	This can be anything you wish, and is used to identify the member type throughout the software.
Member Status	The status the member will begin with, when they first join. If you are charging a membership fee for this type, you should select Pending.
Web Site	The self replicating web site used for the member type. When someone visits a member's self replicating web site, they will see this web site.
Member's Only Area	The Member's Only Area used for the member type. When a member logs into the password protected Member's Only Area, they will see this site.
Program Structures	Check all program structures you would like the member added to when they join. When a new member first joins, the software will add them to all checked program structures, under their sponsor. Please note, this field only applies to when a new member joins, and nothing else.
Default Program Structure	The main program structure of the member type, that is being focused on, and filled. When a new member joins, they will be placed in the sponsor's default program structure, regardless of what member type the new member is.
E-Mail Subscription	The default e-mail subscription for the member type. When a new member joins, their e-mail subscription will start with this, but can be changed at any time through the Member's Only Area.

Continue creating member types using the above method, until you have created all needed member types for your business.

4.6 Set Program Constraints

Now that all program structures and member types have been created, you need to set your program constraints. This allows you to specify exactly which member type is allowed in which program structure. Go to the *Setup->Program Settings* menu, and for each program structure, click on the *Manage Program Constraints* submit button. The next page contains a list of all member types, and looks like:



Every time a member is added to the downlines, the software checks the program constraints just before creating a downline position for the member. The member will only be added to the downlines if the program constraints allow it. The program constraints override all other settings, and are the last check before a downline position is created. In other words, even if the Member Settings state a new member will be added to a program structure, the member will only be added if the program constraints allow it.

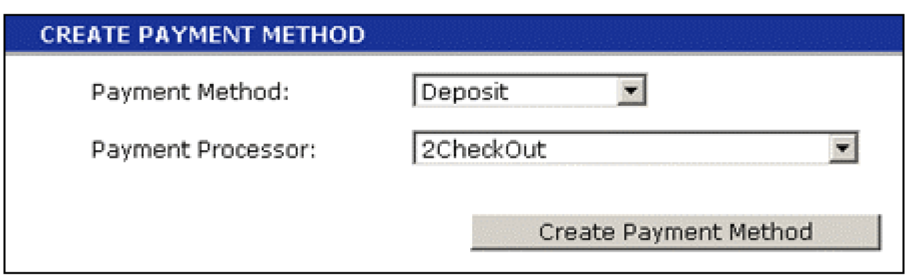
For example, say you have Free and Gold member types, and a separate program structure for each. You would not allow Free members any access to the Gold program structure. When a Gold member joins under a Free member, since Free members are not allowed in the Gold program structure, the Free member will not appear anywhere in the Gold sponsor's downline.

You can also allow access to a program structure, only if it's the member's default program structure. For example, a member could first join and not be allowed access to the program structure, but once they have completed the needed requirements, their default program structure could change, and they'd be given access.

In other words, say you have two matrixes, and members advance to the second matrix after filling the first. You would only give the member type access to the second matrix if it's their default program type. This way, the member would always remain in the first matrix, then once filled, their default program structure would change to the second matrix, allowing them to begin filling it.

4.7 Create Payment Methods

Next you need to create all payment methods, which can be done though the *Setup->Payment Settings* menu. The second box on the page allows you to create a new payment method, and looks like:



There are two different types of payment methods that can be created:

- **Deposit** - Payment methods used to physically charge members for things such as membership fees.
- **Withdraw** – Payment methods used to send funds to members for commission payouts.

Using the two available select boxes, select which payment method and processor you would like to create, and submit the form. If your payment processor is not displayed in the list, select the *"Other – Manual Processing"* option. The next page will ask specific information regarding the payment processor you chose, such as the account ID#, and password.

Depending on the payment processor you chose, there may be some additional things you must do. Below explains all specifics on the different payment processors.

NOTE: If the payment processor is not listed below, then nothing extra needs to be done. The payment processor doesn't require anything additional to be done, in order for it to be integrated with xFlow.

4.7.1 PayPal

In order to use PayPal's automation features (IPN), you must have either a Business or Premier account. If you don't, you must upgrade your PayPal account. You must also activate IPN and specify the IPN URL, which can be done by completing the below steps:

1. Login to your PayPal account through https://www.paypal.com/
2. Click on the Profile tab
3. Under "Selling Preferences", click on the *Instant Payment Notification Preferences* link
4. Click on the Edit submit button, located in the bottom right hand corner of the screen
5. Make sure the checkbox is checked, to activate IPN
6. Enter the IPN URL, which will be:

   http://www.domain.com/cgi-bin/xflow/remote/paypal.cgi

   Of course, replace domain.com with your actual domain name.

7. Click on the Save submit button to activate IPN, and save the changes.

4.7.2 2CheckOut

If you're using 2CheckOut, you must specify your secret word and return URLs. To do this, complete the following steps:

1. Login to your 2CheckOut account through http://www.2checkout.com/
2. Go to the *Account Details->Return* menu
3. You need to specify the Return URL for both, "repurchase.2c Passback Parameters", and "cartpurchase.2c Passback Parameters". The rest of the Return URL fields can be left blank. The Return URL you must specify in the two fields will be:

   http://www.domain.com/cgi-bin/xflow/remote/2checkout.cgi

   Of course, replace domain.com with your actual domain name. Also make sure you select Yes to the questions asking if you would like a routine sent back after a payment is processed.

4. Near the bottom of the page, under the "Overall Passback Parameters" section, make sure the Direct Return box is set to Yes.
5. Under the "Overall Passback Parameters", there is also a field allowing you to enter a Secret Word. This is to help prevent fraudulent transactions, and can be anything you

wish. Please make sure the secret word you enter in 2CheckOut, is the same as xFlow.

6. Click on the “Save Passback Parameters” submit button to save the changes.

4.7.3 2CheckOut (recurring payments)

There are two technical problems with using 2CheckOut for recurring (eg. monthly) payments. First, the 2CheckOut server will only notify xFlow after the first payment, but will not for recurring payments. This means xFlow has no way of knowing if recurring payments were successfully processed or not. Because of this, you will be required to manually approve all recurring payments through the *Transaction->Pending Deposits* menu of the Admin Control Panel.

Second, the 2CheckOut server requires you to first create all recurring products through their system, and requires the product information with every payment request. For every recurring transaction you need to process through xFlow, you will need to create a recurring product with the same information in the 2CheckOut system.

Every time you create a *Withdraw – Membership Fee* transaction through the *Transaction->Transaction Settings* menu, that transaction will be assigned an ID#. You must create a recurring product in the 2CheckOut system with the same ID#, and amounts.

4.7.4 StormPay

In order to use StormPay, you must define your notification URL and secret code. You can do this by completing the following steps:

1. Login to your StormPay account
2. Go to the Profile / Setup section, then the IPN Configuration menu
3. Change the URL to:

   http://www.domain.com/cgi-bin/xflow/remote/stormpay.cgi

   Of course, replace domain.com with your actual domain name.

4. Specify a secret word of your choosing, and make sure the status is set to Active
5. Make sure only the two following check boxes are checked:

   - Payments received through ‘Buy’ or ‘Check Out’ buttons
   - Subscriptions payments received

6. Submit the form to save your changes

4.7.5 PaySystems

You must have a TPP-Pro account in order to use PaySystems. If you are not currently setup on the TPP-Pro system, you can do so by completing the following steps:

1. Go to http://www.revecom.com/ and create a TPP-Catalog test account.
2. Wait for a confirmation e-mail, which contains your company ID, and password.
3. Contact the PaySystems merchant support department, and ask for your account to be changed to TPP-Pro.

4.7.6 WorldPay

In order to use WorldPay, you must have a Junior Select Installation ID#. If you do not have one, please contact WorldPay customer support and request one. If you would like to process recurring (eg. monthly) payments with WorldPay, you must have FuturePay enabled on your account.

You must also specify the callback URL, and a secret word. To do this, complete the following steps:

1. Login to your WorldPay account
2. Go to the Admin section
3. Make sure the Callback checkbox is checked, and specify the Callback URL, which is:
   http://www.domain.com/cgi-bin/xflow/remote/worldpay.cgi

   Of course, replace domain.com with your actual domain name.
4. If you're accepting recurring transactions, and have FuturePay enabled on your WorldPay account, make sure the FuturePay Callback checkbox is checked.
5. You must contact WorldPay customer support, and give them a secret word to be used. This is to prevent fraudulent transactions, and must be the same as the secret word you specify in xFlow.
6. Submit the form to save the changes.

4.7.7 Ikobo

In order to use Ikobo, you must define your IPN URL and password. To do this, complete the following steps:

1. Login to your Ikobo account
2. Click on the Sell Online tab, and once there, click on the 'Instant Payment Notification' link under the Account Features box.
3. Make sure the checkbox is selected to enable IPN, leave the IPN Format field at "Ampersand (&) Delimited)", and change the IPN URL to:
   http://www.domain.com/cgi-bin/xflow/remote/ikobo.cgi
4. Enter any password you would like for your IPN password. Remember the password, as you will need to enter it again when creating Ikobo as a payment processor through the Admin Control Panel.
5. Submit the form to save the changes.

4.7.8 Linkpoint

In order to use Linkpoint, you must upload your .PEM file, which you will receive from Linkpoint once your account is opened. Upload this file to your server at the location */xflow_data/linkpoint.pem*.

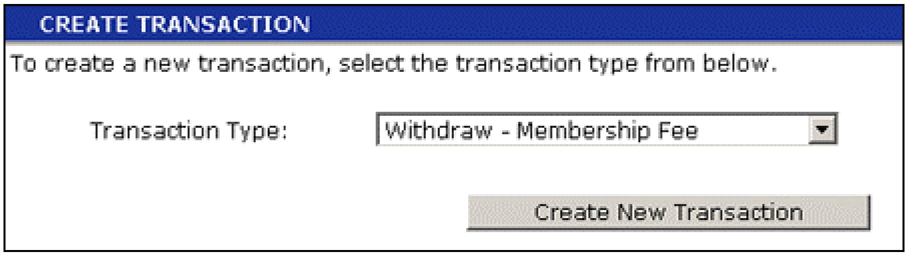
4.7.9 Quickbooks Check Generation

You can use Quickbooks, offered by http://www.intuit.com/, and have xFlow create IIF files of commission payouts, allowing you to import the file into Quickbooks, and automatically have all commission checks ready to be printed.

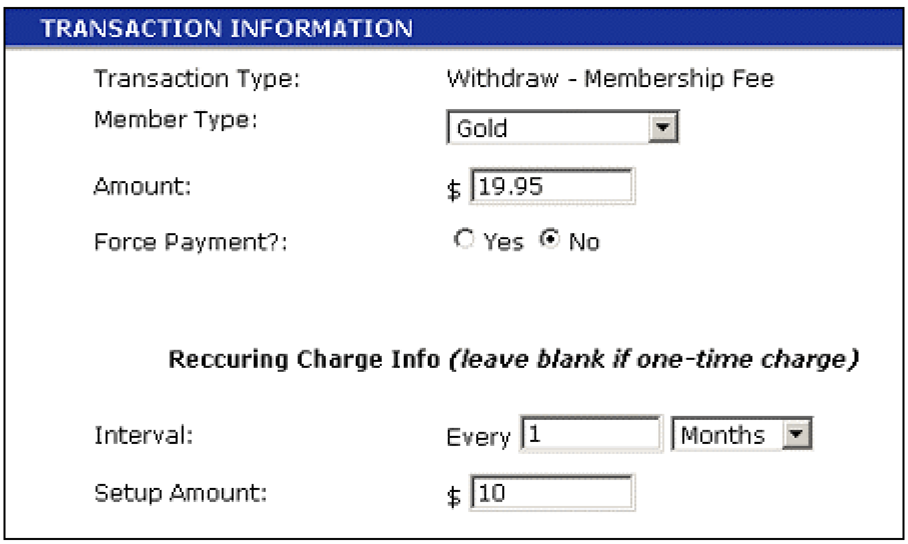
Within Quickbooks, you must create both, a bank account which commissions are withdrawn from, and an expense account which commissions are drawn against. You must specify the name of both accounts in xFlow, when creating the payment method.

4.8 Create Membership Fees

This section explains how to create your membership fees, and is only required if members are required to pay a fee upon joining. All membership fees can be created through the *Transaction->Transaction Settings* menu. At the bottom of the page there will be a select box, asking for the type of transaction you would like to create, which looks like:



Select the *"Withdraw – Membership Fee"* transaction type. The next page asks for specific information on the transaction, and looks like:



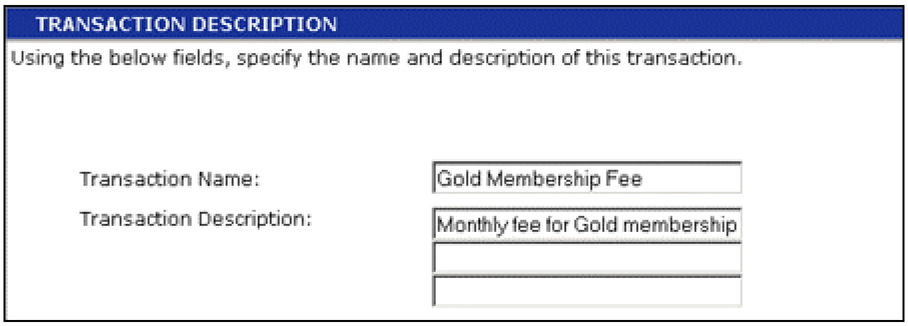
Complete the first section as shown above with the following information:

Field	Description
Member Type	The member type that is being charged the membership fee. When someone of this member type joins, they will be automatically charged this membership fee.
Amount	The amount of the membership fee. If this is a recurring fee (eg. monthly), enter the recurring amount. Do not include any setup fee in this amount.
Force Payment	If yes, the member will always be physically charged the full payment of the membership fee. Otherwise, the membership fee will be withdrawn from the member's current account balance.
Interval	Only required for a recurring membership fee, and allows you to specify how often to charge members.
Setup Amount	Only required for a recurring membership fee, and allows

	you to specify a setup amount. This amount will be added to the actual transaction amount for the first period only.

Using the above image as an example, all Gold members who join will be charged $29.95 for their first month ($19.95 membership fee + $10 setup fee), and $19.95 every month thereafter. Since the force payment field is set to no, the membership fee will be withdrawn from the member's current balance. If the balance doesn't cover the fee, the member will be physically charged the needed amount.

The next section of this page allows you to define the transaction name and description, and looks like:



In these fields you can enter any name and description you would like. The transaction name is displayed when viewing a list of all transactions on a member's account (similar to a bank statement). The description is displayed when viewing full details on a transaction. The values of these fields do not make any functional difference, and can be anything you wish.

Once done, submit the form to create the membership fee transaction. Continue creating one membership fee for every member type that requires a fee to join. If you offer free memberships, do not create a membership fee for that particular member type. When a new member joins, xFlow will automatically charge them the appropriate membership fee, depending on what member type is being created.

If you're using a third party payment processor (eg. PayPal, INTGold, etc.), the new member will be immediately redirected to the appropriate payment server after submitting the signup form on your server. Once the new member has sent payment, xFlow will instantly approve the membership fee transaction, without any manual work involved.

4.8.1 Create Membership Fee Triggers

The following is not required, but typically, you should create two triggers to handle membership fees. One that activates a member's account once their first membership fee is approved, and one that deactivates a member's account if their membership fee is ever declined.

To do this, go to the *Setup->Trigger Settings* menu, and create a *'Transaction Type Added'* trigger with the following information:

Field	Description
Trigger Name	Anything you wish, such as *"Membership Fee – Activate Account"*
Add Trigger Only Once	No
Trigger Interval	*Leave Blank*

Transaction Type	Membership Fee
Transaction Status	Approved
Execute Trigger	Only first transaction
Action to Perform	Change member status
NEXT PAGE	
Change Status To	Active

With the above trigger, every time a new member joins and their first membership fee is approved, their status will be immediately changed to Active, giving them full access to the Member's Only Area. Now we need to create a trigger that automatically deactivates a member when their membership fee is declined. To do this, create another *'Transaction Type Added'* trigger through the *Setup->Trigger Settings* menu with the following information:

Field	Description
Trigger Name	Anything you wish, such as *"Membership Fee – Deactivate Account"*
Add Trigger Only Once	No
Trigger Interval	*Leave Blank*
Transaction Type	Membership Fee
Transaction Status	Declined
Execute Trigger	First transaction, plus every recurring transaction
Action to Perform	Deactivate member

With the above setup, members will be automatically charged the appropriate fee immediately when the fill out the signup form on your server. If needed, the member will be redirected to the appropriate payment server (eg. INTGold, PayPal, etc.) to submit payment. Once payment has been submitted, their membership fee will be instantly approved.

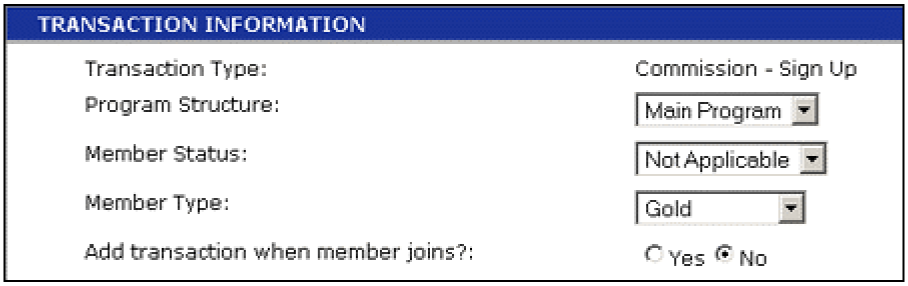
When the first membership fee been approved, the first trigger created will execute and activate the member's account, giving them full access to the Member's Only Area. If any membership fee ever declines, the second trigger created will automatically execute and deactivate the member.

4.9 Define Compensation Plan

Now that all membership fees have been created, you need to define your compensation plan. With the flexible transaction system, you can create almost any type of compensation plan you need. This section will explain exactly how to create your own customized compensation plan with xFlow.

4.9.1 Create Commission Transactions

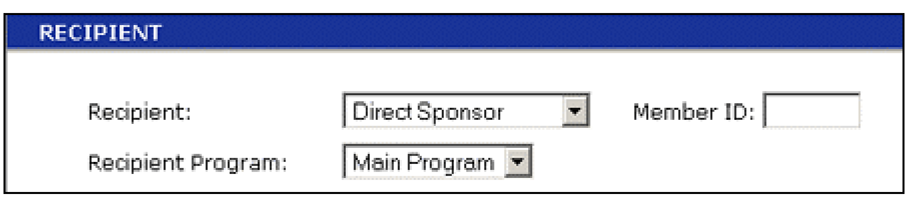
First, we need to create our commission transactions. Go to the *Transaction->Transaction Settings* menu, and create a *"Commission – Sign Up"* transaction. The first section on the next page asks for condition information on the transaction, and looks like:



Complete the section shown above with the following information:

Field	Description
Program Structure	The program structure commission is being paid out for. In other words, when a new member is added to this program structure, this commission will be processed.
Member Status	Generally, this can be left as 'Not Applicable'. If you select a member status, commission will only be added for a member if they have the correct status.
Member Type	The member type commission is being paid out for. In other words, when this member type first joins, this commission transaction will be processed.
Add transaction when member joins?	Typically, this should always be set to No if you're charging a membership fee. Instead, we'll create triggers later ensuring commission is only added when a membership fee is received, and at no other time. If you select Yes, the commission will be immediately processed when a new member joins, regardless if a membership fee has been approved or not. If you select No, the commission will only be processed through triggers, or manually.

The next section on this page asks for the recipient information, and looks like:

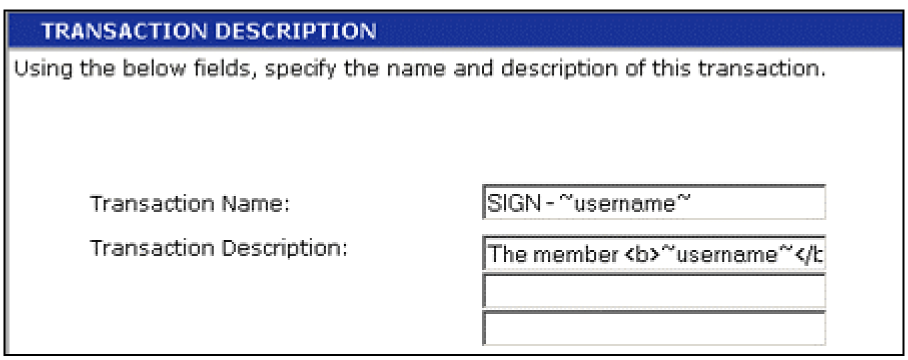


The recipient determines exactly who will receive commission, and is relative to the member the commission transaction is being processed against. For example, if the recipient is set to Upline, when a new member joins, commission will be added to the new member's upline. There are five different recipients available, which are:

Recipient	Description
Member	The member themselves. This is useful for things such as, if

	you would like to give all new members a bonus for joining. The commission will be added to the new member who just joined.
Placement Sponsor	The sponsor who the new member joined under, regardless of where in the downlines the new member was placed.
Direct Sponsor	The sponsor who the new member is placed into the downlines under, regardless of where in the downlines the member is placed (ie. spillover in a matrix). Generally, this is the exact same as the Placement Sponsor, except that the member's placement sponsor can change, but their direct sponsor never will. If you select this option, you must specify a program structure. When the transaction is processed, commission will be added to the member's direct sponsor of the selected program structure.
Upline	The member's upline. If you select this option, you must specify a program structure. When the transaction is processed, commission will be added to the member's upline of the selected program structure.
Specific Member	The commission will always be added to a specific member in your database. If you select this, you must enter the ID# of the member in the provided text box.

The next section on this page allows you to specify a transaction name and description, and looks like:



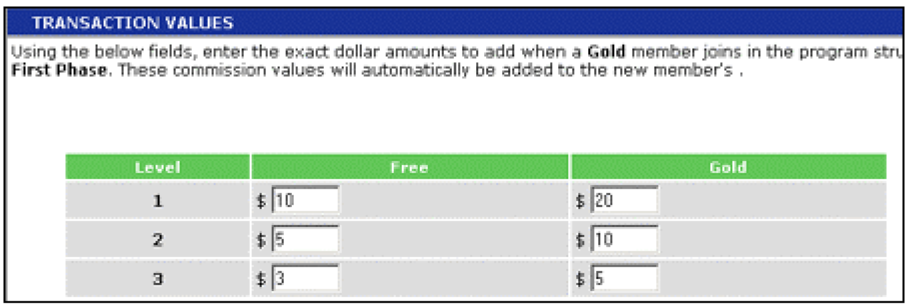
In these fields you can enter any name and description you would like. The transaction name is displayed when viewing a list of all transactions on a member's account (similar to a bank statement). The description is displayed when viewing full details on a transaction. The values of these fields do not make any functional difference, and can be anything you wish.

You can use several merge fields in the name and description of commission transactions. These merge fields are:

Field	Description
~id_number~	The ID# of the downline member, who commission was paid out for.

~username~	The username of the downline member, who commission was paid out for.
~position~	The downline position ID# of the member who received the commission.
~level~	The downline level that commission was paid out for.
~program_name~	The name of the program structure that commission was paid out for.
~interval~	Only applicable for interval commissions. The interval (eg. weekly / monthly) that commission was added for.

Now that the first page is completed, submit the form. You will be taken to another page where you can enter the commission values, which looks like:



The table contains one column for each member type in your database, and one row for each level commission is being paid out on. If you selected anything other than Upline as the recipient, this table will only contain one row, as only one member will receive commission.

Enter the exact dollar amounts you would like added to the recipient when the commission is processed. When processing the commission, the software will go through each recipient, check their member type, and add the appropriate commission. Using the above image as an example, if the first level upline is a Gold member, they will receive $20 in commission. If the second level upline is a Free member, they will receive $5 in commission, if the third level upline is a Gold member, they will receive $5 in commission, and so on.

Once you've entered your commission values, submit the form to create the new commission transaction. Continue creating as many commission transactions as needed, for your entire compensation plan. Ignore the *"Commission – Interval"* transaction type for now, and instead, create only *"Commission – Sign Up"* transactions, even for recurring commissions.

4.9.2 Create Commission Triggers

Now that all commission transactions have been created, we need to make sure commission is only added when a membership fee is received. This can be done by creating triggers, that will automatically process the commission transactions when a membership fee is received and approved.

Go to the *Setup->Trigger Settings* menu. For every sign up commission transaction you created, that is only added when a new member first joins, create one *"Specific Transaction Added"* trigger with the following information:

Field	Description

Trigger Name	Anything you wish, such as *"Commission – Gold Member Sign Up"*
Add Trigger Only Once	No
Trigger Interval	*Leave Blank*
Transaction ID	*Select any membership fee transaction. When this transaction is approved, the trigger will automatically process the needed commission transaction.*
Transaction Status	Approved
Execute Trigger	First transaction only *This ensures the commission is only added once when the member joins, and pays their first membership fee, and not after any recurring membership fees.*
Action to Perform	Add specific transaction
NEXT PAGE	
Transaction to Add	*Select the appropriate commission transaction. When the selected membership fee is approved for the first time after a new member joins, this commission will be automatically processed.* *For example, if you selected the 'Gold' membership fee on the previous page, you would select the sign up commission transaction for 'Gold' members.*
Amount [SYS]	*Leave blank*
Override Payment	No

Continue creating one trigger with the exact information above, for every sign up commission transaction you need. Now, for every recurring (eg. monthly) commission transaction you created that is only added when a recurring membership fee is received, create one *"Specific Transaction Added"* trigger with the following information:

Field	Description
Trigger Name	Anything you wish, such as *"Commission – Gold Member Recurring"*
Add Trigger Only Once	No
Trigger Interval	*Leave Blank*
Transaction ID	*Select any membership fee transaction. When this transaction is approved, the trigger will automatically process the needed commission transaction.*
Transaction Status	Approved

Execute Trigger	Not first transaction, but all recurring transactions *This ensures the commission will not be added when a new member first joins, but instead, will only be added when a member pays their recurring membership fee.*
Action to Perform	Add specific transaction
NEXT PAGE	
Transaction to Add	*Select the appropriate commission transaction. When the selected recurring membership fee is approved, this commission will be automatically processed.* *For example, if you selected the 'Gold' membership fee on the previous page, you would select the recurring commission transaction for 'Gold' members.*
Amount [SYS]	*Leave blank*
Override Payment	No

Continue creating one trigger with the information above, for every recurring commission transaction you created. With the above setup, you should have one trigger for every commission transaction. When a new member first joins, no commission will be immediately added. Instead, once they have paid their membership fee, the appropriate trigger will execute, and automatically process the needed sign up commission.

Then every time a recurring membership fee is approved, the appropriate trigger will also execute, and process the needed recurring commission. This ensures no commission is ever paid out, until the membership fee has first been received.

4.9.3 Commission Bonuses

Depending on your compensation plan, you may want to give one-time commission bonuses to your members, once they have completed certain requirements. For example, you may want to give a commission bonus once a member fills their matrix, or once a member has recruited a certain number of members.

There are two steps to create a commission bonus:

1. Create the needed commission transaction.

2. Create the needed trigger to automatically process the commission once the needed requirements have been met.

To start, create a new *"Commission – Sign Up"* transaction through the *Transaction->Transaction Settings* menu, just as you above. Make sure to select No to the question asking if you would like the commission added when a new member joins. For a recipient, you'll most likely want to select *'Member'*, if the commission bonus is being given to the member.

Once you've created the commission transaction, you need to create a trigger through the *Setup->Trigger Settings* menu. The trigger you need to create will be different, depending on the commission bonus you are creating.

When members fills a matrix

Automatically give the commission bonus when a member fills their forced matrix by creating a *'Genealogy Modification'* trigger with the following information:

Field	Description
Trigger Name	Anything you wish.
Add Trigger Only Once	No
Condition	Member fills matrix
Member Type	*The member type that will receive the commission bonus.*
Program Structure	*The forced matrix that must be filled for the member to receive the commission bonus.*
Action to Perform	Add specific transaction
NEXT PAGE	
Transaction to Add	*The transaction created in the first step of creating the commission bonus.*
Amount [SYS]	Leave blank.
Override Payment	No

With the above trigger, the commission bonus will be automatically processed every time the member fills their forced matrix of the specified program structure.

When member recruits X people

Automatically give commission once a member has recruited a certain number of people by creating a *"Downline Size Modification"* trigger with the following information:

Field	Description
Trigger Name	Anything you wish.
Add Trigger Only Once	Yes
Trigger Interval	Leave blank
Condition	Member personally recruited X members
Member Type	*The member type the member must be, in order to receive the commission bonus*
Program Structure	Not applicable
Number of Members	*The number of people the member must recruit, in order to receive the commission bonus.*

Downline Member Type	*Optional, and allows you to specify what member type the member must recruit, in order to receive the commission bonus.*
Count Type	Total downline
Action to Perform	Add specific transaction
NEXT PAGE	
Transaction to Add	*The transaction created in the first step of creating the commission bonus.*
Amount [SYS]	Leave blank.
Override Payment	No

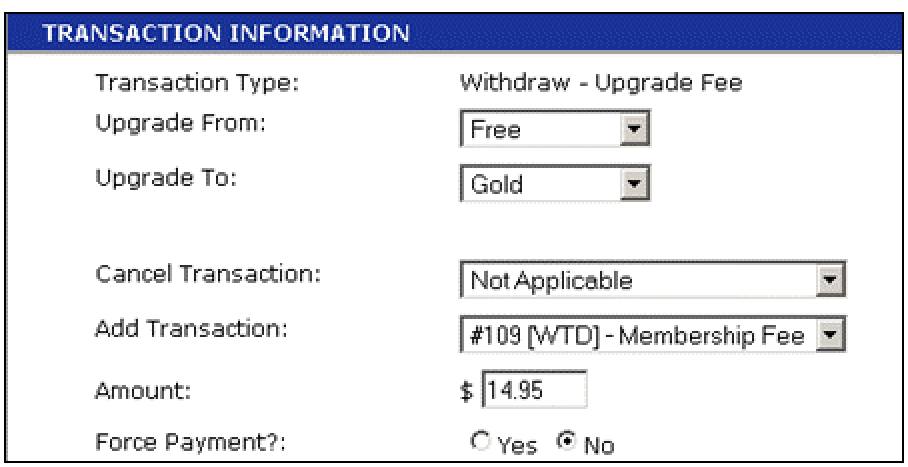
With the above trigger, the member will automatically receive the commission bonus once they have personally recruited the appropriate number of people.

4.10 Create Upgrade Fees

If you offer different levels of membership, you may want to allow members to pay a fee through the Member's Only Area, and instantly have their account upgraded. There are three steps involved, which are explained below.

4.10.1 Create Upgrade Fee Transactions

Go to the *Transaction->Transaction Settings* menu, and create a *"Withdraw – Upgrade Fee"* transaction. The next page asks for specific information on the upgrade fee transaction, and looks like:



Complete the section shown above with the following information:

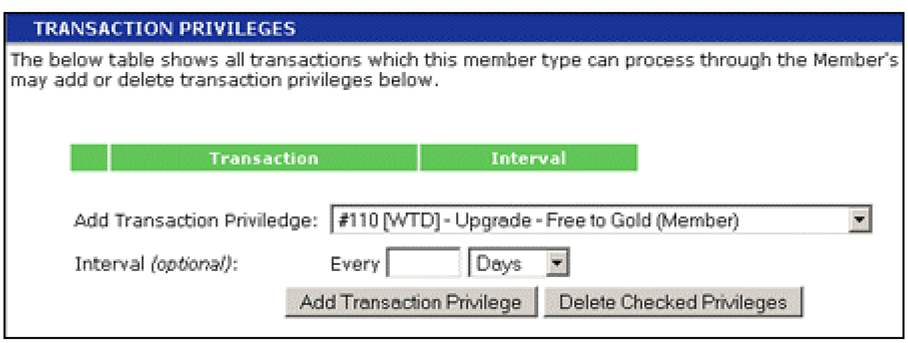
Field	Description

Upgrade From	The member type that is being upgraded. In other words, a member from this member type will pay the upgrade fee, and have their account upgraded.
Upgrade To	The member type that the member will be upgraded to, after paying the upgrade fee.
Cancel Transaction	This is only required if the *Upgrade From* member type is being charged a recurring membership fee. Select the recurring membership fee the member is being charged, and when a member upgrades, their old recurring membership fee will be automatically cancelled.
Add Transaction	The recurring membership fee for the *Upgrade To* member type. When a member upgrades, this recurring membership fee will be automatically added to the member's account.
Amount	The one-time fee the member must pay, in order to upgrade. This is the only fee members will pay when upgrading. Then the recurring membership fee selected will also be added to their account for all future payments.
Force Payment	If yes, the member will be physically charged the full amount of the upgrade fee. Otherwise, the fee will be withdrawn from the member's current balance, and will only be physically charged the needed amount.

Then fill out the transaction name and description fields with anything you wish. Once done, submit the form to create the new upgrade fee transaction. Continue creating upgrade fee transactions as described above for every type of upgrade you need.

4.10.2 Set Transaction Privileges

Once you have created all upgrade fee transactions, you need to set the privilege settings, and allow members to process the transactions through the Member's Only Area. Go to the *Setup->Privilege Settings* menu, and select the desired member type. The bottom of the next page allows you to define transaction privileges, and looks like:



Members can only process transactions through the Member's Only Area, if that transaction has first been added as a privilege. If the transaction privilege has not been set, the member will receive an error message when trying to process the transaction. Select the appropriate upgrade fee transaction from the list, and click on the *"Add Transaction Privilege"* submit button. This will allow the selected member type to process the transaction through the Member's Only Area.

4.10.3 Add Links to Member's Only Area

Last, you need to add the needed links to your Member's Only Area, allowing your members to process the upgrade fee transaction(s), and have their account instantly upgraded. First, you need the ID# of each upgrade fee transaction. Go to the *Transaction->Transaction Settings* menu, and click on the *"View Details"* link for the upgrade fee transactions. This will display a list of all upgrade fees, with their ID#.

Inside your Member's Only Area, you will need to add the following link for each upgrade fee transaction:

index.cgi?~authtext~&action=process_transaction&transid=**[ID#]**

Of course, replace **[ID#]** with the actual ID# of the upgrade fee transaction. When a member clicks on the link from within the Member's Only Area, they will be prompted to process the upgrade fee transaction. Once the transaction has been successfully processed, their member type will be instantly upgraded.

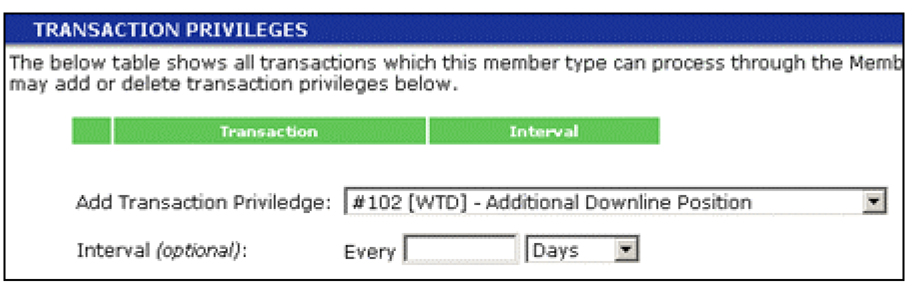
4.11 Set Member Privileges

Next, you need to set member privileges, specifying exactly which actions they can perform through the Member's Only Area. To start, go to the *Setup->Privilege Settings* menu of the Admin Control Panel. The displayed page contains a small table, listing all member types in your database. To continue, click on one of the *Manage Settings* links.

On the next page, the first section contains a large table, listing all actions that can be performed through the Member's Only Area. Simply check off all actions that the member type can perform within the Member's Only Area. If wanted, you may specify a time limit on certain actions. Doing so, will only allow members to perform that action once during the specified interval.

4.11.1 Transaction Privileges

The second section on the page is titled Transaction Privileges, and looks something like:



This allows you to specify which transactions members are able to process through the Member's Only Area. If a member tries to process a transaction that has not been added through here, they will receive an error. To continue, simply select the needed transaction from the list. If wanted, you may also specify an interval, which will only allow each member to process the transaction once during the specified interval.

4.12 Create Notifications

Next you need to create all needed notifications that will automatically send out personalized e-mail messages at the appropriate times. The notification system is very flexible, allowing you to define a specific condition for each notification. Every time that condition occurs, the e-mail message will be automatically sent out.

4.12.1 Create Notifications

To start, go to the *Communicate->Notification Settings* menu. The bottom of the page allows you to create a new notification. There are six different types of notifications you can create, which are:

Notification Type	Description
Database Modification	Used for general database actions, such as when members are created / deleted, when their member type changes, and so on. This notification type is for things such as new member welcome messages, to notify the sponsor when a member joins under them, and so on.
Genealogy Modification	Used for modifications to the downline, such as when a downline position is created / deleted, and when a member fills their matrix.
Specific Transaction Added	When a specific transaction is processed, that you created through the *Transaction->Transaction Settings* menu.
Transaction Type Added	When one of the internal transaction types is added to the database, such as any membership fee transaction, and commission fee transaction, and so on.
Trigger Executed	When a trigger is executed that you created through the *Setup->Trigger Settings* menu.
Other	When other miscellaneous actions occur such as when a coupon code is generated, or payment method added.

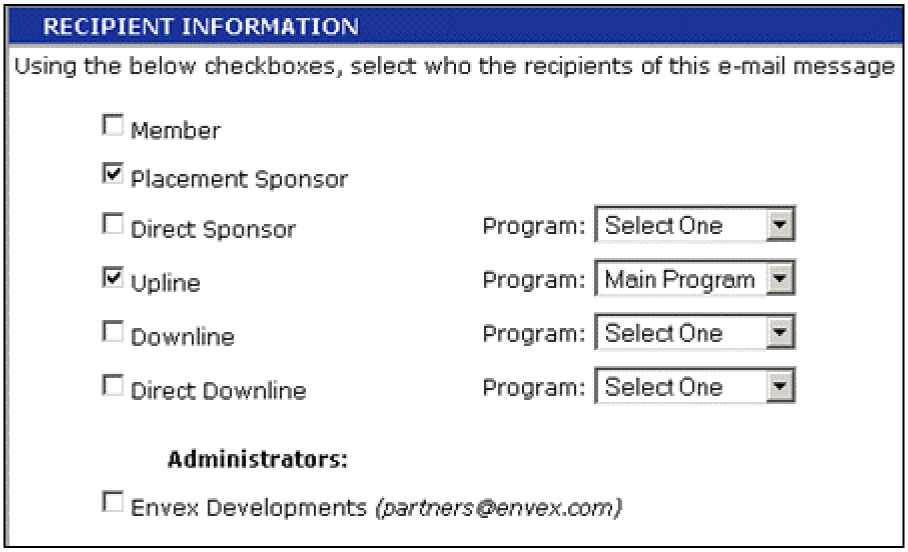
Select the notification type you could like to create, and submit the form. The next page asks for different information on the new notification:

Condition Information

This section asks for different information, allowing you to specify exactly when the notification will be automatically sent. Complete these fields with the desired information, and every time that action occurs, the notification will be automatically sent. For full details on this section, and a description of every field, please read *Section 5.3 Notification Settings*.

Recipient Information

The second section asks for recipient information, and looks like:

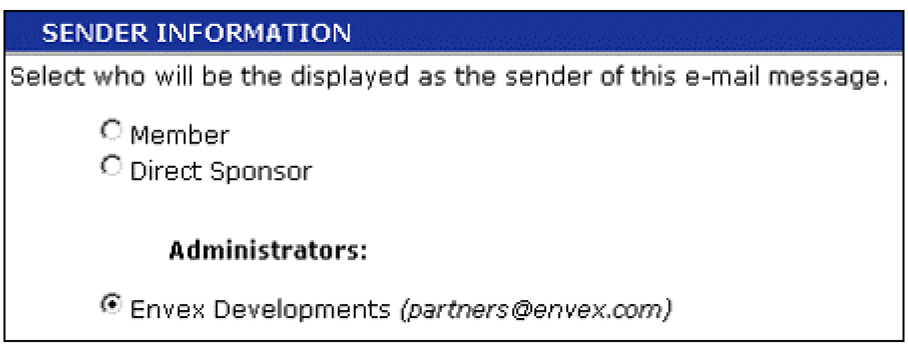


This section allows you to select exactly who will receive the e-mail message, when the notification is processed. The recipients are relative to the member who the notification is being processed against. For example, with the above image, if a new member is created the e-mail message would be sent to the new member's placement sponsor and upline.

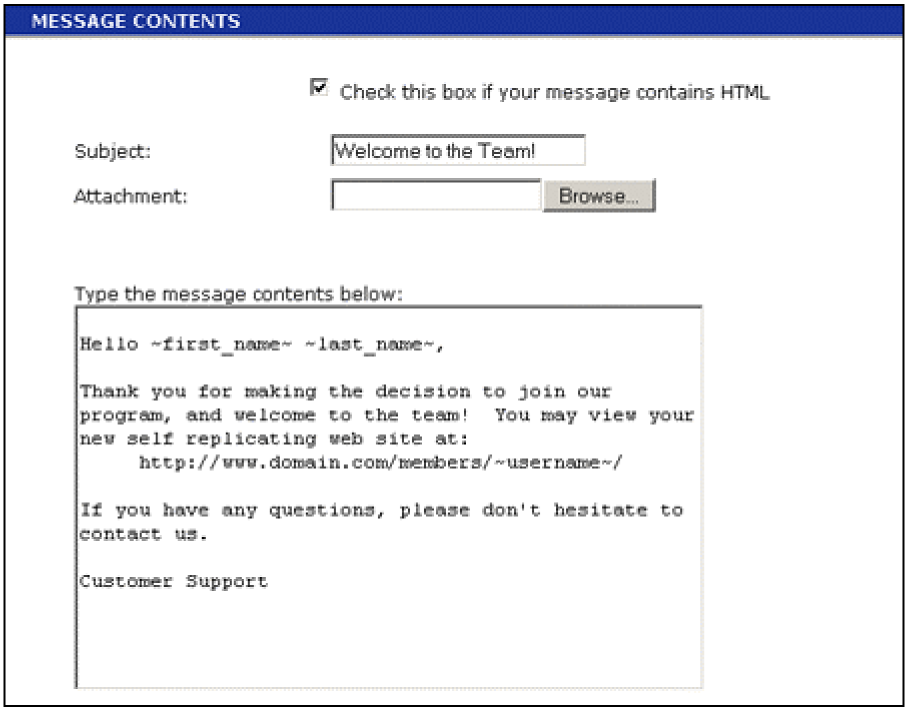
Several of the options ask for a program structure as well. This means the selected genealogy information will be taken from the selected program structure.

Sender Information

The last section on this page asks for the sender information, and looks like:



This section allows you to specify who the sender of the e-mail message is. Simply select who you would like placed in the *'From:'* line of the e-mail message, and submit the form to continue. The next page allows you to specify the contents of the e-mail message, and looks like:



Enter the contents of the e-mail message in the provided box. You may personalize the e-mail message by using merge fields. At the top of the screen, there are several boxes containing various fields that the e-mail message can be personalized with. Click on one of the fields, and the needed merge field will be automatically placed inside the contents of the e-mail message. When the e-mail message is sent, the merge field will be automatically replaced with the appropriate personalized information.

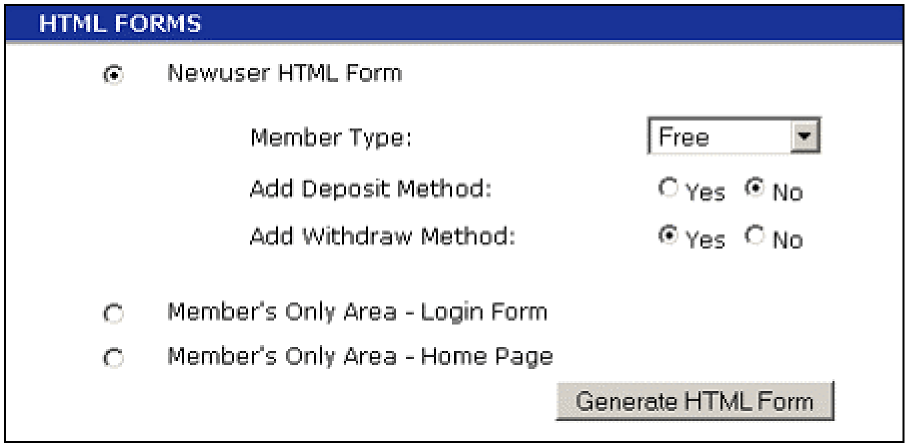
Once you've entered the contents of the e-mail message, submit the form to save the notification. Continue creating notifications as described above, until you have created all desired notifications for your business.

4.12.2 Password Reminder Message

You should also specify contents for the password reminder e-mail message that is sent when members request their password be e-mailed to them. Go to the *Communicate->Notification Settings* menu, and click on the *"View Details"* link for the System Notifications. The only e-mail message contained in this section is the password reminder message, which you can edit.

4.13 Generate HTML Forms

Now you need to generate the needed HTML forms for your program, such as the new user signup form, and login form. To start, go to the *Setup->Generate HTML Forms* menu of the Admin Control Panel, and the first section looks like:



4.13.1 Newuser HTML Form

First, you need to generate all needed newuser HTML forms, which allow new members to join from your self replicating web site. You must select a Member Type, which determines which member type the new member will first be when they join through this form. You can also specify whether you want the deposit and withdraw information sections included in the HTML form.

If a membership fee is required when a new member joins, you should have the deposit information included. This means when a new member joins, they will have to enter payment information, which they will be charged for all membership fees. If you would like members to specify how they would like commission pay outs sent to them, you should have the withdraw information included. Alternatively, you can choose not to include the withdraw information, and allow members to enter in through the Member's Only Area after they join.

If you would like to create fields on the sign up form that are required to match each other, you can add a '_confirm_' before the field name. So if you needed for example, the password field to be confirmed in a separate field, you would create a field:

<input type="text" name="password" size=25>

and then another field:

<input type="text" name="_confirm_password" size=25>

This will ensure that the two fields must match in order for the signup form to be accepted.

4.13.2 Member's Only Area – Login Form

This form allows members to login to the Member's Only Area, by entering their username and password. You only need to generate this form if you selected *"HTML login form"* for the authentication method, during First Time Setup. If you selected *"NCSA htaccess"* for the authentication method, no login form is required, and members can login to the Member's Only Area by simply going to the URL such as:

http://www.domain.com/members_only/index.cgi

4.13.3 Member's Only Area – Home Page

This page is used as an example for the home page of the Member's Only Area, and contains links to all actions that members can perform. By default, every Member's Only Area you create will start with this default page, so there's usually no need to generate this page.

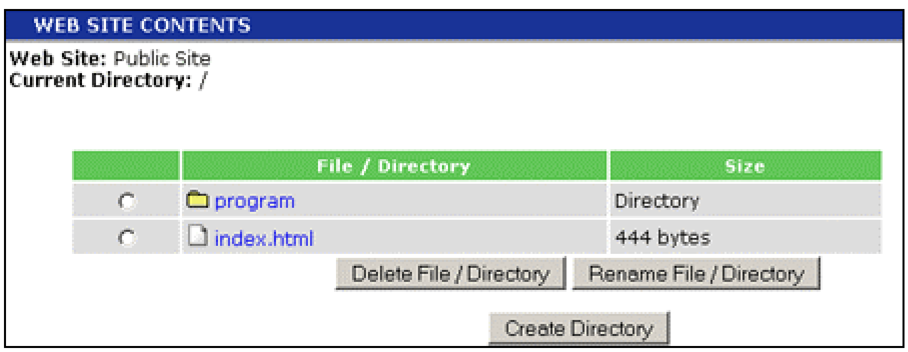
4.13.4 HTML Results

Once you have selected the HTML form to generate, submit the form. The next page will contain the results of the generated form, which you can then copy and paste into a web page. Alternatively, you can have the results saved to a web page using the form located on the bottom of the results page.

4.14 Upload Self Replicating Web Sites

Next, you need to upload your self replicating web site(s), and Member Only Area(s). To start, go to the *Setup->Manage Web Site* menu of the Admin Control Panel. The first page displays a list of all web sites currently in your database. Simply select the web site you would like to manage, and click on the *"Manage Web Site"* submit button.

The first section on the next page is titled Web Site Contents, and looks something like:



This table lists all files and directories currently in the selected web site. You may move into a directory, and view the contents of it by simply clicking on the directory name. You may edit the contents of any file, by clicking on the name of the file.

The last section on the page titled *"Upload Web Pages"*, allows you to upload a maximum of ten web pages at once. Simply click on the Browse button beside a text box, and select the web page from your computer. Once you've selected all needed web pages to upload, click on the *"Upload Web Page"* submit button, to upload all the web pages into the current directory.

4.14.1 Root Web Site

Please note, uploading files into your self replicating web site does not upload them to your root web site at http://www.domain.com/. Instead, the web pages are only uploaded to your self replicating web site, which is usually located at:

http://www.domain.com/members/USERNAME/

There is a good chance you will want to tie in your root web site, with your self replicating web site. There are three ways to accomplish this:

1.) Create a small doorway page, at http://www.domain.com/, which only contains a "Click Here to Enter" image, which links to one of your member's self replicating web sites.

2.) Use the same home page as your self replicating web site, but change the HTML links to link to a member's self replicating web site. However, this means you need to maintain two different copies of your home page.

3.) Use the Homepage Rotator module, which will automatically redirect visitors to a member's self replicating web site.

4.14.2 Member's Only Area – Process Transaction Link

xFlow allows members to process transactions through the Member's Only Area. To create a link in your Member's Only Area allowing members to process a transaction, you must first get the ID# of the transaction. To do this, go to the *Transaction->Transaction Settings* menu, and click on the needed *"View Details"* link. A list of transactions and their ID# will be displayed. Not the ID# of the transaction you would like to create a link for.

To allow member's to process the transaction through the Member's Only Area, you need to create a link, which goes to:

index.cgi?~authtext~&action=process_transaction&transid=XXX

Replace *XXX* in the above URL with the ID# of the transaction.

4.14.3 Member's Only Area – E-Mail Downline Link

Instead of allowing members to e-mail their entire downline, you may want to restrict which portion of their downline they can e-mail. There are several different variables you can add to the link, allowing you to define exactly which downline members will be e-mailed. The below table shows all variables that can be used in the link. Please note, all variables are completely optional, and not required in any way.

Variable	Description
type=XXX	Defines which part of the downline will be e-mailed. *XXX* can be any of the following: • **downline** – The member's entire downline • **direct** – The member's direct downline. In other words, those who joined from the member's web site, regardless of where they were placed in the matrix. • **all** – Both, the member's full downline, and direct downline. If no variable is supplied, the software defaults to *downline*.
program_id=XXX	If members are allowed downline positions in more than one program structure, you can define exactly which program structure they can e-mail. Simply replace *XXX* with the ID# of the program structure, which can be found by going to the *Setup->Program Settings* menu.
phase=XXX	Only applicable if you're using a recycling matrix. This allows you to define exactly which phase the member can e-mail. All members start at phase **1**, and every time they cycle back into the matrix, the phase increments by one. Simply replace *XXX* with the phase

	number you would like.
level=XXX	Define the exact downline level member's can e-mail. This is not applicable if you define *direct* as the *type* variable. Simply replace *XXX* with the downline level you would like member's to e-mail.

The below link will send an e-mail to the direct downline of the program structure ID# 2.

index.cgi?~authtext~&action=email_downline&type=direct&program_id=2

The below link will send an e-mail to the third level downline of the program ID# 1

index.cgi?~authtext~&action=email_downline&program_id=1&level=3

The below link will send an e-mail to the direct downline, of the second phase, of the program ID# 3.

index.cgi?~authtext~&action=email_downline&type=direct&program_id=3&phase=2

4.14.4 Member's Only Area – Download Link

You can offer downloadable files through the Member's Only Area, which only members who are logged in will have access to. This is useful if you offer things such as eBooks, or PDF files to members only. First, upload the needed files to your Member's Only Area through the *Setup->Manage Web Site* menu.

You can allow member's to download a file by placing the following link in your Member's Only Area:

index.cgi?~authtext~&action=download&file=*FILENAME*

Of course, replace *FILENAME* in the above link with the actual filename you would like to download. When a member clicks on the link, the software will send the specified file to them as a binary, downloadable file.

4.14.5 Member's Only Area – Shopping Cart

If you have the Shopping Cart module installed, you can allow your members to purchase products from the Shopping Cart, through the Member's Only Area. There are several links used that allow your members to browse products, add products to their cart, checkout, and so on. All links are described below.

Browse Categories / Products:

Members can browse all categories and products within the Shopping Cart by going to the following link within the Member's Only Area. The *catid=* part is optional, and is the ID# of the category to view, which can be found through the *Products->Manage Categories* menu of the Shopping Cart module. If not supplied, the software will default to ID# 0.

index.cgi?~authtext~&action=shop&shop_action=browse_category&catid=ID

Add Product to Cart

Members can add a new product to their Shopping Cart by using the following link, where the *product_id=* part is the unique ID# of the product that you defined.

index.cgi?~authtext~&action=shop&shop_action=add_product&product_id=ID

View Product Details

Members can view details on a specific product by using the following link, where the *product_id=* part is the unique ID# of the product that you defined.

index.cgi?~authtext~&action=shop&shop_action=view_product&product_id=ID

View Shopping Cart

Members can view and manage the contents of their personal Shopping Cart by using the following link:

index.cgi?~authtext~&action=shop&shop_action=view_cart

Checkout

Members can check out, and submit payment for their order by using the following link:

index.cgi?~authtext~&action=shop&shop_action=checkout

4.15 Create Your First Member

The last thing you need to do is create your first member, which can be done through the *Database->Create New Member* menu of the Admin Control Panel. This is your company, or master account, so the username should be something such as “admin”, “company”, etc. Since this is your first member, please be sure to leave the Sponsor field blank.

For full information on exactly how to create a member, please visit *6.1 Creating Members*.

4.16 Setup Complete!

Congratulations! xFlow should now be fully setup, and you should be ready to launch your program. If you still have any questions regarding how to setup your business, please consult *Chapter 5. Additional Setup*, or the KnowledgeBase located at http://kbase.envex.com/

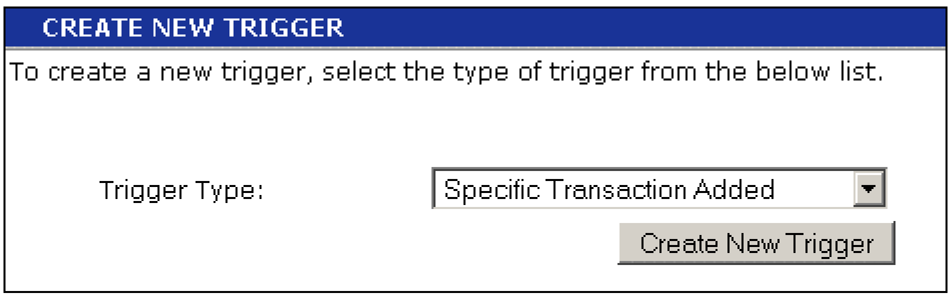
5.) Additional Setup

This chapter explains additional setup information, such as specifics on triggers, transactions, and so on.

5.1 Trigger Settings

Triggers are an extremely powerful tool, and allow you to automate many aspects of your business. Have an action automatically occur when a specified event occurs. For example, automatically deactivate a member's account when their membership fee is declined, send an e-mail message X days after a member joins, upgrade a member once they've recruited X members, and so on.

You can create and manage triggers through the *Setup->Trigger Settings* menu. At the bottom of the page who can select which trigger type you would like to create:

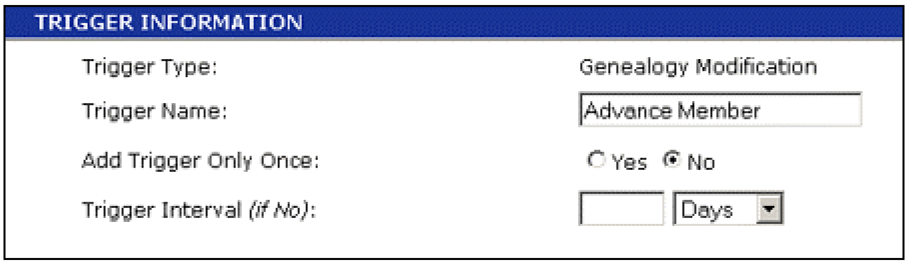


There are several different types of triggers you can create, which are explained in the below table:

Trigger Type	Description
Database Modification	Used for general database actions, such as when members are created / deleted, when their member type changes, and so on,
Genealogy Modification	Used for modifications to the downline, such as when a downline position is created / deleted, and when a member fills their matrix.
Downline Size Modification	When a member's downline size reaches a certain number of members. For example, when a member has recruited a certain number of members, or when their total downline has become so large.
Specific Transaction Added	When a specific transaction is processed, that you created through the *Transaction->Transaction Settings* menu.
Transaction Type Added	When one of the internal transaction types is added to the database, such as any membership fee transaction, and commission fee transaction, and so on.
Transaction Balance Modification	When the total transactions on a member's account, or the accounts of their upline / downline reach a

	certain level. Useful for things such as, upgrading a member once they've earned a certain amount in commission.
Other	When members have been in the database for a certain number of days after joining. Useful for things such as trial memberships, and sending automated follow up messages to new members.

Select the type of trigger you would like to create, and submit the form. The first section on the next page asks for general information on the trigger, and looks like:



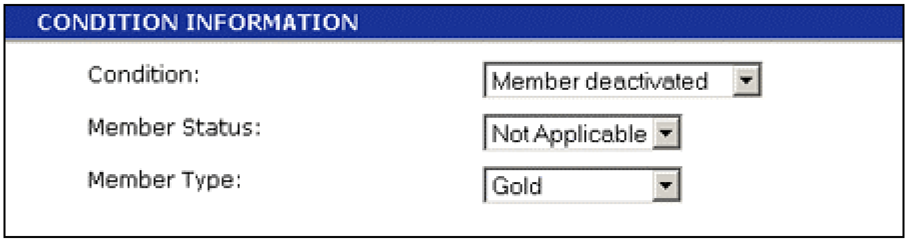
Complete the section shown above with the following information:

Field	Description
Trigger Name	This can be anything you wish, and is used to identify the trigger throughout the software.
Add Trigger Only Once	If yes, the trigger will only be executed against each member once. This is useful for things such as, adding commission once a member recruits X people, because otherwise, the trigger would be executed every time the member recruited someone, since they would always meet the condition of the trigger. If you select no, the trigger will always execute once the condition has been met. This is useful for things such as, adding commission every time a membership fee is approved.
Trigger Interval	Generally this field is always left blank, but allows you to specify how often the trigger can be executed against each member. This is useful for things such as, giving a commission bonus every 30 days, as long as a member continues to have a certain downline size.

The second section on this page asks for the condition information of the trigger. Every time the condition occurs within the software, the trigger will automatically execute and perform the needed action. Each trigger contains different condition information, as explained below:

<u>Database Modification</u>

Asks for information on what action occurred against the member, and looks like:



Complete the section shown above with the following information:

Field	Description
Condition	The condition that occurred against the member
Member Status	The status the member must be, in order for the trigger to execute.
Member Type	The type the member must be, in order for the trigger to execute.

Using the above image as an example, the trigger will automatically execute every time a Gold member is deactivated, regardless of what the member's status is.

Genealogy Modification

This sections asks for information on what action must occur to the genealogy in order for the trigger to execute, and looks like:

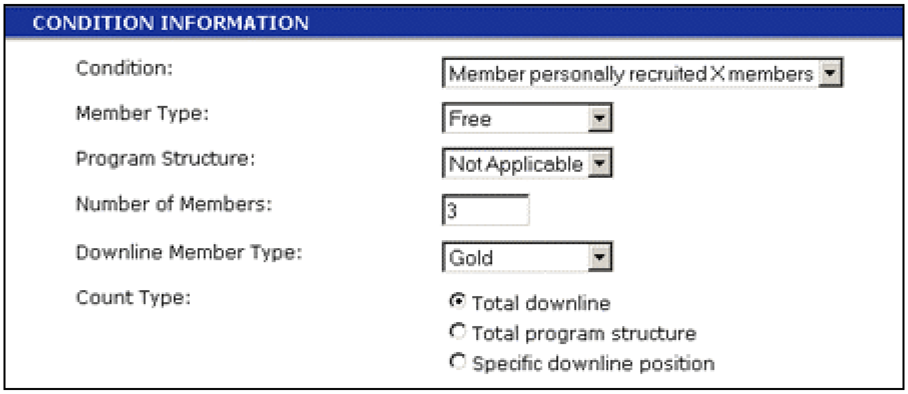
Complete the section shown above with the following information:

Field	Description
Condition	The condition that occurred within the genealogy
Member Type	The type the member must be, in order for the trigger to execute.
Program Structure	The program structure that the condition must occur in, for the trigger to execute.

Using the above image as an example, the trigger will automatically execute every time a Gold members fills their matrix in the *"Main Program"* program structure.

Downline Size Modification

Asks for various information on the member's downline, and what requirement it must meet in order for the trigger to execute. This section looks like:



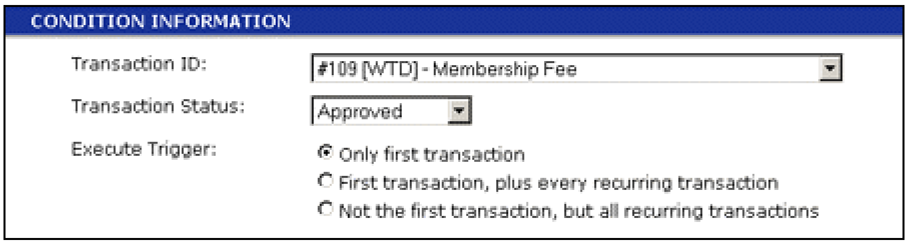
Complete the section shown above with the following information:

Field	Description
Condition	The condition the member's downline must meet, in order for the trigger to execute
Member Type	The type the member must be, in order for the trigger to execute. Using the above image as an example, this trigger will only execute against free members.
Program Structure	Only required if you select *"Total Program Structure"* or *"Specific Downline Position"* for the *"Count Type"* field. The member's downline of this program structure must meet the condition in order for the trigger to execute, regardless of what downline the member has in other program structures.
Number of Members	The size the member's downline must meet, in order for the trigger to execute.
Downline Member Type	Optional, but allows you to specify what member type is checked for the trigger. Using the above image as an example, the trigger will only count Gold members in the downline.
Count Type	What portion of the member's downline to check. If you select *"Total downline"* the trigger will include the member's entire downline, including all program structures. If you select *"Total program structure",* the trigger will only include the member's downline of the selected program structure, but will include all phases the member has in that program structure. For example, if you have a recycling matrix, a member may have more than one downline position in the same program structure. If you select *"Specific downline position"*, the trigger will only check each individual downline position in the selected program structure, instead of all downline positions combined.

Using the above image as an example, the trigger will automatically execute when a Free member has personally recruited three Gold members. The trigger will combine all downline positions of the Free member, regardless of the program structure.

Specific Transaction Added

Asks for information on what transaction must be added in order for the trigger to be executed, and looks like:



Complete the section shown above with the following information:

Field	Description
Transaction ID	The transaction that must be added to a member's account in order for the trigger to be executed.
Transaction Status	The status the transaction must be, in order for the trigger to execute.
Execute Trigger	This is only applicable for recurring transactions, and allows you to specify which transactions the trigger should be executed for. You can specify only the first transaction, only recurring transactions, or not the first transaction, but all recurring transactions.

Using the above example, the trigger will automatically execute when the ID# 109 transaction is approved. The trigger will only execute for the first transaction, and not any recurring transactions.

Transaction Type Added

Asks for information on the transaction that must be added in order for the trigger to execute, and looks like:

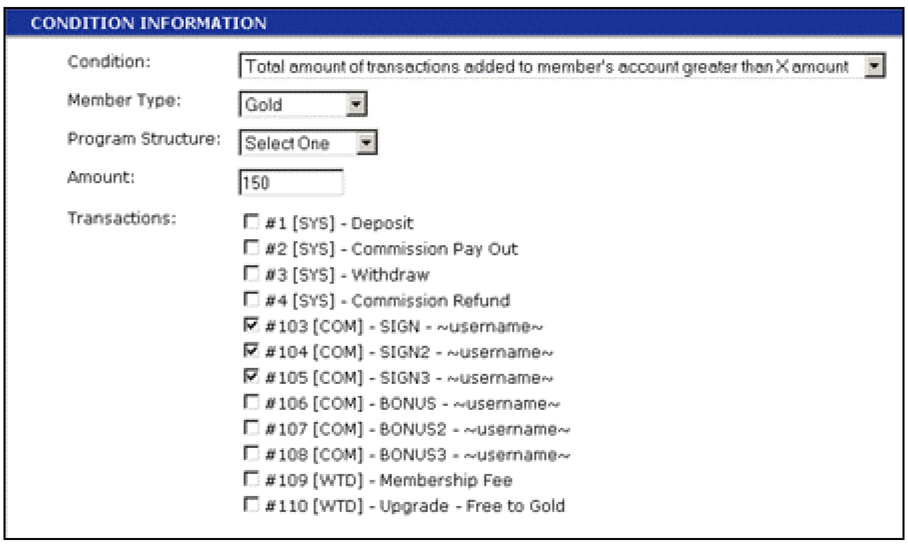
Complete the section shown above with the following information:

Field	Description
Transaction Type	The type of transaction that must be added, in order for the trigger to be executed.
Transaction Status	The status the transaction must be, in order for the trigger to execute.
Execute Trigger	This is only applicable for recurring transactions, and allows you to specify which transactions the trigger should be executed for. You can specify only the first transaction, only recurring transactions, or not the first transaction, but all recurring transactions.

Using the above image as an example, the trigger will automatically execute every time a membership fee transaction is approved, regardless if it's the first transaction, or a recurring transaction.

Transaction Balance Modification

This section asks what condition the member's transaction account must meet in order for the trigger to execute, and looks like:



Complete the section shown above with the following information:

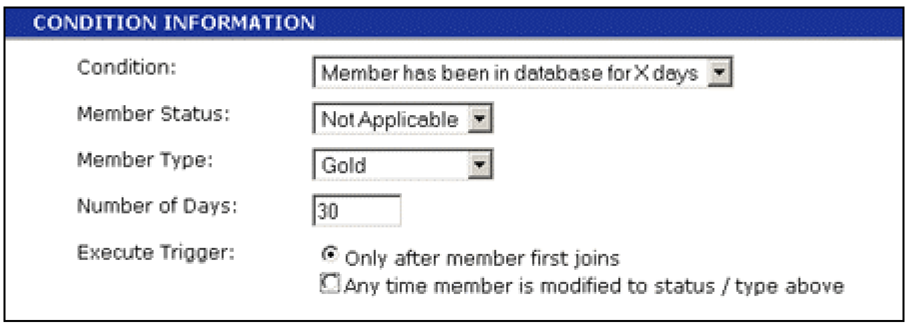
Field	Description
Condition	The condition that must occur, in order for the trigger to execute.
Member Type	The type the member must be, in order for the trigger to be executed.
Program Structure	This is only required if you select the total amount of transactions added to the upline or downline for the condition. This specifies which program structure to take the upline or downline from.
Amount	The total amount in transactions the account(s)

	must meet in order for the trigger to execute.
Transactions	Check all transactions you would like included in the amount checked. The trigger will use the total combined amount of all checked transactions added to the appropriate account(s).

Using the above image as an example, the trigger will automatically execute when the total combined amount of ID# 103, 104, and 105 transactions added to a Gold member's account exceeds $150.

Other

This section asks for information on after how many days a member has been in the database the trigger should execute, and looks like:



Complete the section shown above with the following information:

Field	Description
Condition	There is only one condition available, allowing you to create a trigger which executes after a member has been in the database a certain number of days.
Member Status	The status the member must be, in order for the trigger to execute.
Member Type	The type the member must be, in order for the trigger to execute.
Number of Days	The number of days the member must be in the database, in order for the trigger to execute.
Execute Trigger	On which members to execute the trigger against. If you select only after a member first joins, the trigger will execute after the specified number of days after the member first joins, if the member matches the status and member type specified. If you select any time after a member has been modified, the trigger will execute after the member has been the specified status and member type for the specified number of days.

Using the above image as an example, the trigger will automatically execute 30 days after a Gold member joins.

Action to Perform

At the bottom of the page, there's a select box asking for an action to perform when the condition if fulfilled and the trigger is executed. There are several different actions that can be performed, which are explained in the table below.

Action	Description
No Action (dummy trigger)	No action will be performed when this trigger is executed. Instead, this is mainly used for things such as sending notifications when the trigger is executed.
Change member status	Change a member's status.
Change member type	Change a member's type. You can also select whether or not to add sign up commissions when the member type is upgraded.
Delete member	Delete a member from the database, exactly the same as the *Database->Delete Member* menu does. You can also specify how to refund commission previously added to the member's upline.
Activate member	Activate a member, exactly as you would through the *Database->Activate Member* menu. You can also specify whether or not to add sign up commissions to the member's upline.
Deactivate member	Deactivate a member, exactly as you would through the *Database->Deactivate Member* menu.
Add downline position(s)	Add a member into the selected program structure(s) under their placement sponsor. This places a member into the downlines, exactly as if they just joined.
Delete downline position(s)	Delete all of the member's downline positions in the selected program structures.
Change default program structure	Change the member's default program structure, so the new program structure will become the main one they are filling. This is useful for things such as, automatically advancing a member to another matrix after they have filled the previous one.
Add specific transaction	Process a specific transaction against the member's account, exactly as you would through the *Transaction->Add Transaction* menu.
Change placement sponsor	Change a member's placement sponsor, exactly as you would through the *Genealogy->Change Sponsor* menu, option #1.

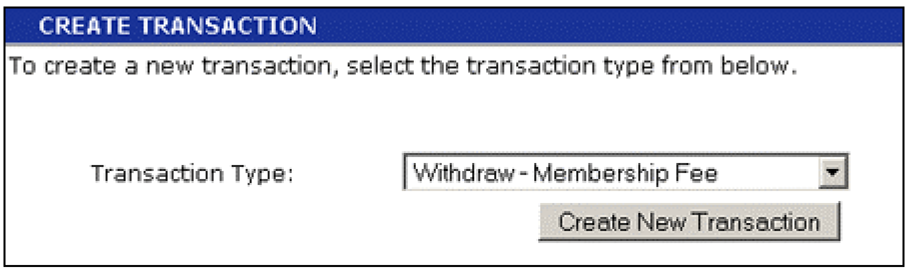
Select the action you would like automatically performed when the trigger executes, and the next page will ask for any required information regarding the specific action. Once you have created a trigger, it will immediately begin to execute when the specified condition is fulfilled.

5.2 Transaction Settings

The transaction system allows you to create an index of transactions that can be customized to your exact business. Develop almost any type of compensation plan imaginable, easily charge membership fees, sell additional products and services to your members, plus more.

5.2.1 Create New Transactions

You can create and manage the index of transactions through the *Transaction->Transaction Settings* menu. There is a select box at the bottom of the page allowing you to specify which type of transaction you would like to create, which looks like:



There are several different types of transactions you can create, each with its own use, as described in the below table.

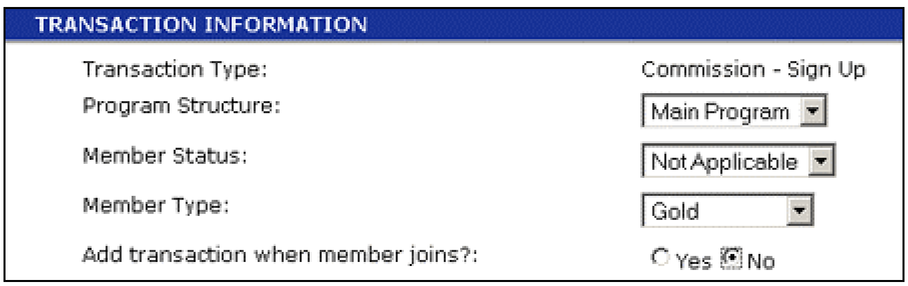
Transaction Type	Description
Commission – Sign Up	Used for one-time commissions, such as when a new member joins. Typically, this will also include recurring commissions, if you have triggers setup to automatically add commissions when a membership fee is approved, as described above.
Commission – Interval	Used for recurring commissions (eg. monthly). However, when this transaction is processed, no commission will be automatically added. Instead, the next recurring commission date will be scheduled, and commission will be added then.
Deposit – Miscellaneous	Used for any miscellaneous deposits into member's accounts that are not included in commissions.
Withdraw – Membership Fee	Used to charge membership fees when new members join, and recurring (eg. monthly) fees to remain a member.
Withdraw – Upgrade Fee	Used to allow members to upgrade from one member type to another through the Member's Only Area.
Withdraw – Product / Service	Used to sell additional products and services to

Fee	members through the Member's Only Area.
Withdraw – Commission Pay Out Fee	Used to charge members a fee when paying out commissions to them. For example, charge a $1 processing fee to send commissions.
Withdraw – Miscellaneous	Used for any miscellaneous withdrawals from member's account that are not included in the other transaction types.

Select the transaction type you would like to create, and submit the form. The first section on the next page is titled *"Transaction Information"*, and asks for different information depending on the transaction type being created. Below gives full details on this section for each transaction type.

Commission – Sign Up

This section asks for different information on when the commission should be added, and looks like:


TRANSACTION INFORMATION

Transaction Type:	Commission - Sign Up
Program Structure:	Main Program
Member Status:	Not Applicable
Member Type:	Gold
Add transaction when member joins?:	Yes No

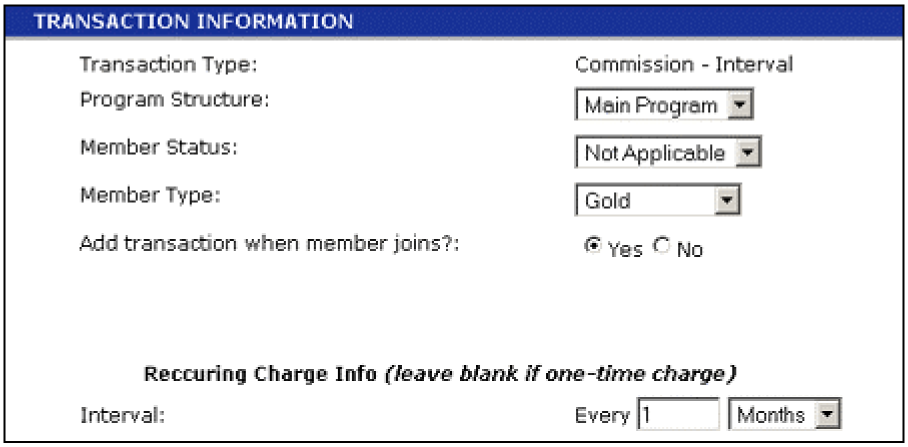
Complete the section shown above with the following information:

Field	Description
Program Structure	The program structure commission is being added for. When a member is added into this program structure, the commission will be processed.
Member Status	The status the member must be, in order for the commission to be processed (ie. the new member who just joined).
Member Type	The type the member must be, in order for the commission to be processed (ie. the new member who just joined).
Add transaction when member joins?	Whether or not to process the commission immediately after a new member joins. If yes, the commission will be processed regardless if the new member has paid their membership fee or not. If you're charging membership fees, you should generally set this to no. Then setup a trigger that processes the commission when the membership fee is approved, as described above.

Using the above image as an example, the commission will be processed when a Gold member is added to the *"Main Program"* program structure, regardless of the Gold member's status. However, the commission will not be processed immediately after a new member joins, but instead, will be processed through a trigger.

Commission – Interval

This section asks for different information on when the commission transaction should be processed, and looks like:


TRANSACTION INFORMATION

Transaction Type: Commission - Interval

Program Structure: Main Program

Member Status: Not Applicable

Member Type: Gold

Add transaction when member joins?: Yes No

Reccuring Charge Info *(leave blank if one-time charge)*

Interval: Every 1 Months

Complete the section shown above with the following information:

Field	Description
Program Structure	The program structure commission is being added for. When a member is added into this program structure, the commission will be processed.
Member Status	The status the member must be, in order for the commission to be processed (ie. the new member who just joined).
Member Type	The type the member must be, in order for the commission to be processed (ie. the new member who just joined).
Add transaction when member joins?	Whether or not to process the commission immediately after a new member joins. If yes, the commission will be processed regardless if the new member has paid their membership fee or not.
Interval	How often to add the commission to a member.

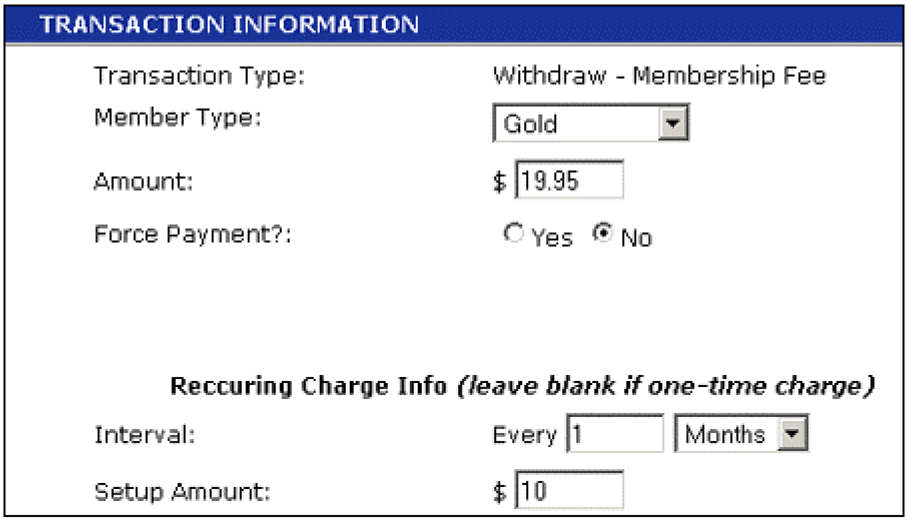
Using the above image as an example, a new interval commission will be scheduled every time a Gold member is added to the *"Main Program"* program structure. The commission will be automatically added every month.

Deposit – Miscellaneous

Since this transaction type is never automatically processed by the software, no condition information is required. Instead, this section only contains one field allowing you to specify a recurring interval if needed. Leave this field blank if this is not a recurring transaction.

Withdraw – Membership Fee

This section asks for different information on the member type to charge a membership fee, and looks like:



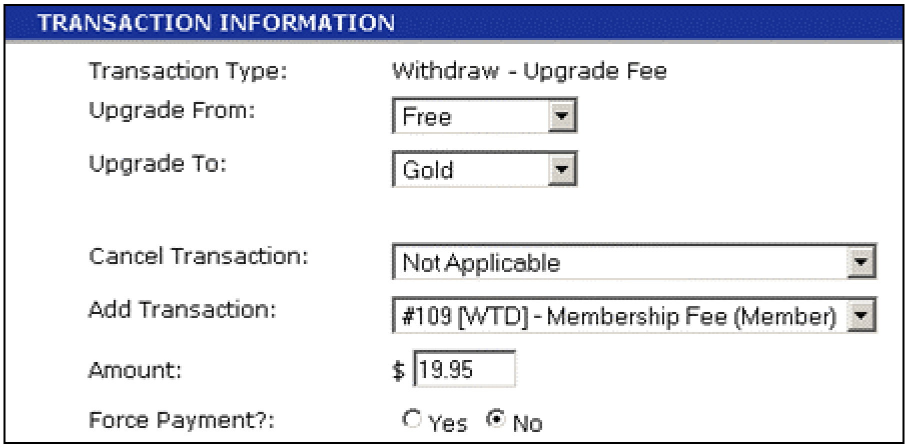
Complete the section shown above with the following information:

Field	Description
Member Type	The member type that is being charged the membership fee. When someone of this member type joins, they will be automatically charged this membership fee.
Amount	The amount of the membership fee. If this is a recurring fee (eg. monthly), enter the recurring amount. Do not include any setup fee in this amount.
Force Payment	If yes, the member will always be physically charged the full payment of the membership fee. Otherwise, the membership fee will be withdrawn from the member's current account balance.
Interval	Only required for a recurring membership fee, and allows you to specify how often to charge members.
Setup Amount	Only required for a recurring membership fee, and allows you to specify a setup amount. This amount will be added to the actual transaction amount for the first period only.

Using the above image as an example, every time a new Gold member joins they will be charged $29.95 ($19.95 + $10 setup fee), and will be charged $19.95 every month thereafter. The fee will be withdrawn from their existing balance.

Withdraw – Upgrade Fee

This section asks for different information on what member type to upgrade, and looks like:



TRANSACTION INFORMATION

Transaction Type: Withdraw - Upgrade Fee

Upgrade From: Free

Upgrade To: Gold

Cancel Transaction: Not Applicable

Add Transaction: #109 [WTD] - Membership Fee (Member)

Amount: $ 19.95

Force Payment?: Yes No

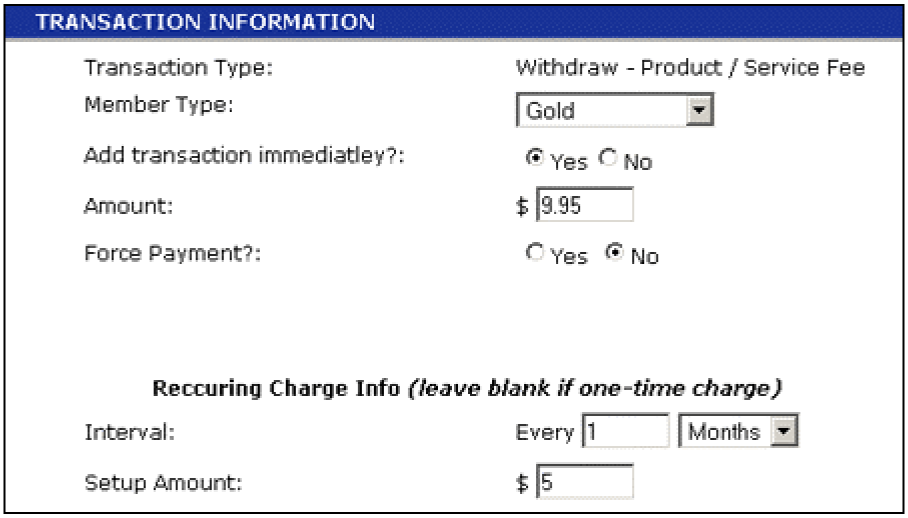
Complete the section shown above with the following information:

Field	Description
Upgrade From	The member type that is being upgraded. In other words, a member from this member type will pay the upgrade fee, and have their account upgraded.
Upgrade To	The member type that the member will be upgraded to, after paying the upgrade fee.
Cancel Transaction	This is only required if the *Upgrade From* member type is being charged a recurring membership fee. Select the recurring membership fee the member is being charged, and when a member upgrades, their old recurring membership fee will be automatically cancelled.
Add Transaction	The recurring membership fee for the *Upgrade To* member type. When a member upgrades, this recurring membership fee will be automatically added to the member's account.
Amount	The one-time fee the member must pay, in order to upgrade. This is the only fee members will pay when upgrading. Then the recurring membership fee selected will also be added to their account for all future payments.
Force Payment	If yes, the member will be physically charged the full amount of the upgrade fee. Otherwise, the fee will be withdrawn from the member's current balance, and will only be physically charged the needed amount.

Using the above image as an example, Free members can upgrade to a Gold member for a fee of $19.95, which is withdrawn from their current account balance. Once they've upgraded, the recurring membership fee ID# 109 will be added to their account.

Withdraw – Product / Service Fee

This section asks for different information on the product or service you will be selling to members, and looks like:



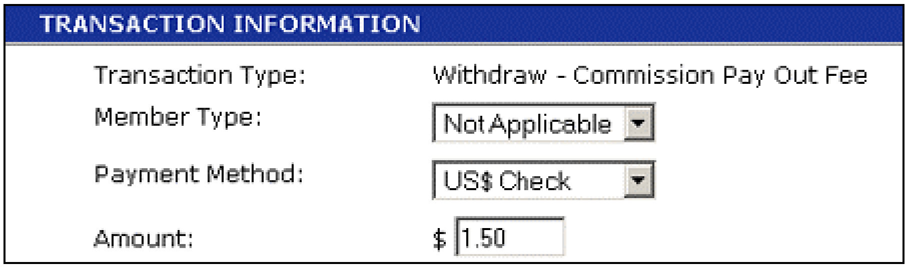
Complete the section shown above with the following information:

Field	Description
Member Type	Not required, but allows you to specify what member type can process this transaction. Only the selected member type will be allowed to process the transaction, if one is selected.
Add transaction immediately?	Allows you to specify whether to charge the member immediately when the transaction is processed, or wait until the first recurring payment date. If yes, the transaction will be immediately withdrawn from the member's account. Otherwise, no funds will be withdrawn from the member's account until the first recurring payment date.
Amount	The amount to withdraw from the member's account. If this is a recurring transaction, enter the recurring amount here. Do not include any setup fee.
Force Payment?	If yes, the member will be physically charged the full amount of the transaction. Otherwise, the fee will be withdrawn from the member's current balance, and will only be physically charged the needed amount.
Interval	Only required if this is a recurring transaction, and allows you to specify how often to withdraw funds from the member's account.
Setup Amount	Only required if this is a recurring transaction, and allows you to specify a setup amount for the transaction, that will be included with the first charge only.

Using the above image as an example, only Gold members can process the transaction. Members will be charged a one-time fee of $14.95, and $9.95 for every month thereafter. The funds will be withdrawn from the member's current account balance.

Withdraw – Commission Pay Out Fee

This section asks for different information on when to charge member's a commission processing fee, and looks like:



Complete the section shown above with the following information:

Field	Description
Member Type	Not required, but allows you to specify what member type will be charged this fee.
Payment Method	Not required, but allows you to specify what payment method will be charged this fee.
Amount	The amount to charge members when commissions are paid out.

Using the above image as an example, every time commission is paid out to a member through the *"US$ Check"* payment method, the member will be charged a fee of $1.50.

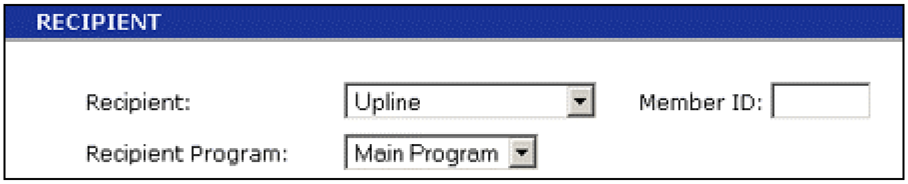
Withdraw – Miscellaneous

Since this transaction type is never processed automatically by the software, there are only a few fields in this section, which are explained in the table below:

Field	Description
Add transaction immediately?	Allows you to specify whether to charge the member immediately when the transaction is processed, or wait until the first recurring payment date. If yes, the transaction will be immediately withdrawn from the member's account. Otherwise, no funds will be withdrawn from the member's account until the first recurring payment date.
Force Payment?	If yes, the member will be physically charged the full amount of the transaction. Otherwise, the fee will be withdrawn from the member's current balance, and will only be physically charged the needed amount.
Interval	Only required for recurring transactions, and lets you specify how often to charge the member. Leave this field blank if the transaction is a one-time charge.

5.2.2 Recipient

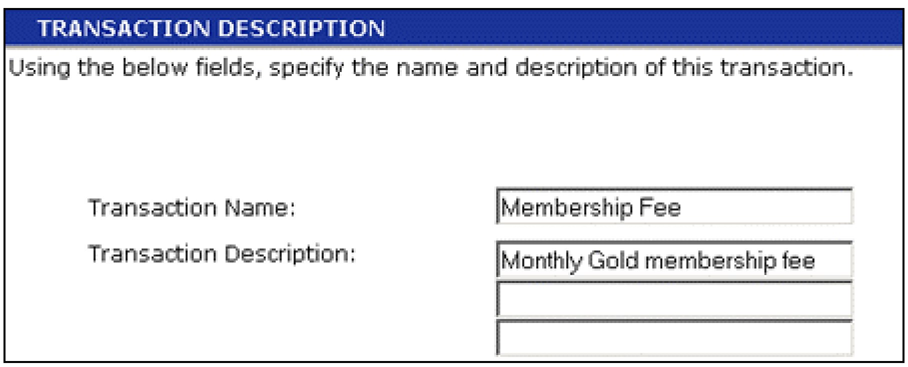
Depending on the transaction type you're creating, there may be a section asking for the recipient of the transaction. This allows you to specify exactly who the transaction will be processed against, and looks like:



When a transaction is processed against a member, the software will add the transaction to the recipient(s), relative to the member. Using the above image as an example, when the transaction is processed, the software will add the transactions to the member's upline of the *"Main Program"* program structure.

5.2.3 Transaction Description

The next section on this page allows you to specify a transaction name and description, and looks like:

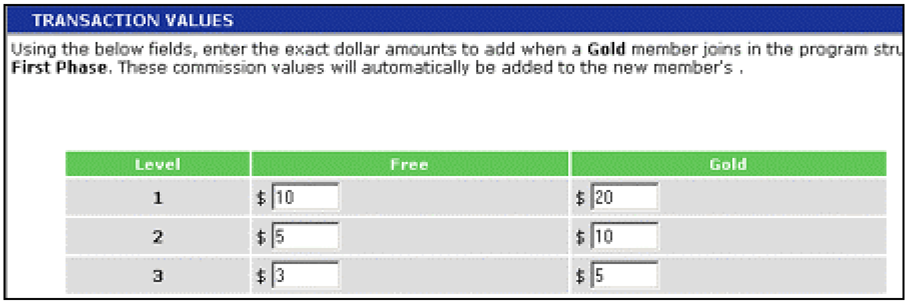


In these fields you can enter any name and description you would like. The transaction name is displayed when viewing a list of all transactions on a member's account (similar to a bank statement). The description is displayed when viewing full details on a transaction. The values of these fields do not make any functional difference, and can be anything you wish.

Now that the first page is completed, submit the form. Depending on the transaction type, the transaction will now be created, or you will be prompted with another page to enter the values of the transaction.

5.2.4 Transaction Values

Depending on the transaction type, you may now be looking at a page asking for transaction values, that looks like:



The table contains one column for each member type in your database, and one row for each level of recipient the transaction is being paid on. If you selected anything other than Upline as the recipient, this table will only contain one row, as only one member will receive commission.

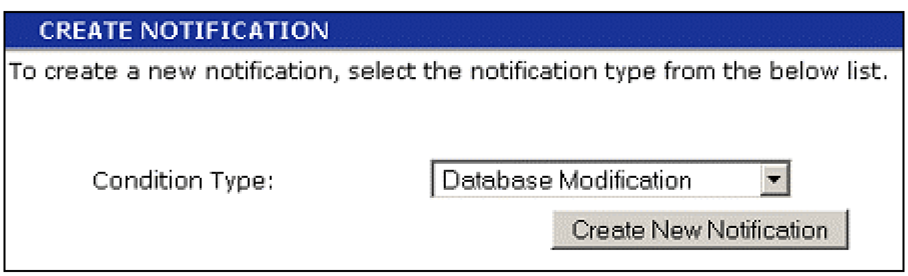
Enter the exact dollar amounts you would like added to the recipient when the transaction is processed. When processing the transaction, the software will go through each recipient, check their member type, and add the appropriate amount to the recipient's account. Once you've entered the transaction values, submit the form to create the new transaction.

5.3 Notification Settings

The notification system allows you to define exactly how and when personalized e-mail messages are sent. You have the ability to create an index of notifications, each with a pre-defined condition, and the notification will be automatically processed every time that condition is met throughout the software.

5.3.1 Creating Notifications

You can create and manage your notifications through the *Communicate->Notification Settings* menu. At the bottom of the page there is a select box, allowing you to select which notification type you would like to create, which looks like:



There are several different types of notifications you can create, which are explained in the below table:

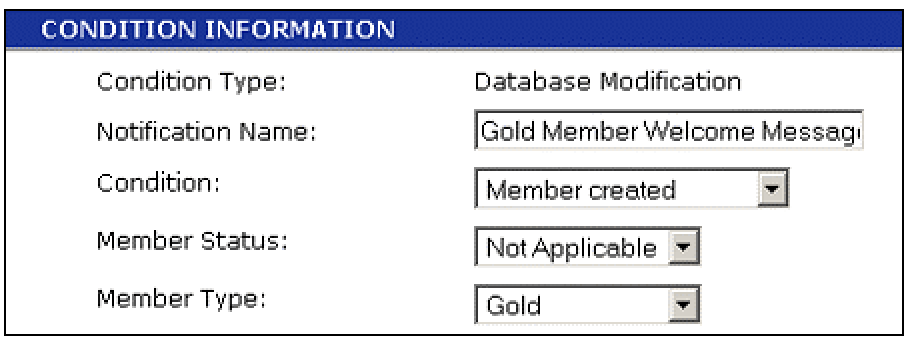
Notification Type	Description
Database Modification	Used for general database actions, such as when members are created / deleted, when their member type changes, and so on. This is useful to send welcome messages to new member, notify sponsors that a new member has joined under them, and so on.
Genealogy Modification	Used for modifications to the downline, such as when a downline position is created / deleted, and when a member

	fills their matrix.
Specific Transaction Added	When a specific transaction is processed, that you created through the *Transaction->Transaction Settings* menu. This is useful to send e-mail messages when a membership fee is approved or declined.
Transaction Type Added	When one of the internal transaction types is added to the database, such as any membership fee transaction, and commission fee transaction, and so on.
Trigger Executed	When a trigger created through the *Setup->Trigger Settings* menu is executed.
Other	When either a payment method is added / modified, or when a new coupon code is generated.

Select the notification you would like to create, and submit the form. The first section on the next page asks for different information, depending on the notification type being created, which is explained below:

Database Modification

This section asks for different information on the database modification that must take place in order for the notification to be processed, and looks like:



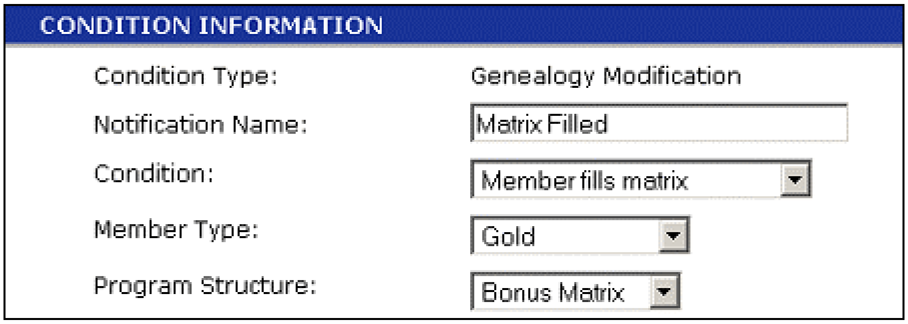
Complete the section shown above with the following information:

Field	Description
Notification Name	Anything you wish.
Condition	The condition that occurred against the member
Member Status	The status the member must be, in order for the notification to be processed.
Member Type	The type the member must be, in order for the notification to be processed.

Using the above image as an example, the notification will be automatically processed every time a Gold member is created, regardless of what the member's status is.

Genealogy Modification

This section asks for different information on the genealogy modification that must take place in order for the notification to be processed, and looks like:



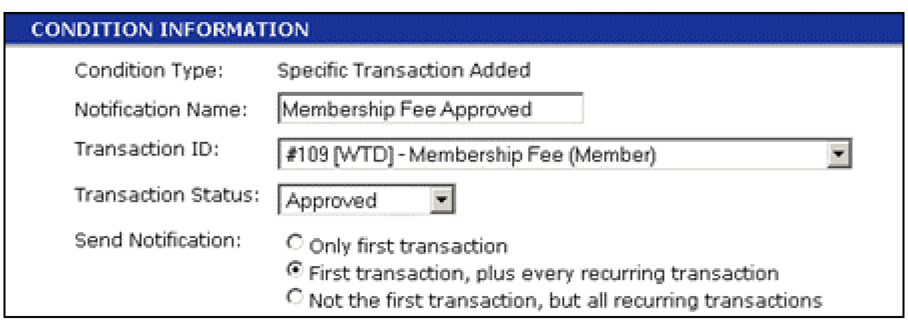
Complete the section shown above with the following information:

Field	Description
Notification Name	Anything you wish.
Condition	The condition that occurred within the genealogy
Member Type	The type the member must be, in order for the notification to be processed.
Program Structure	The program structure that the condition must occur in, for the notification to be processed.

Using the above image as an example, the notification will be automatically processed every time a Gold member fills the *"Bonus Matrix"* program structure.

Specific Transaction Added

This section asks for different information on the transaction that must be added in order for the notification to be processed, and looks like:



Complete the section shown above with the following information:

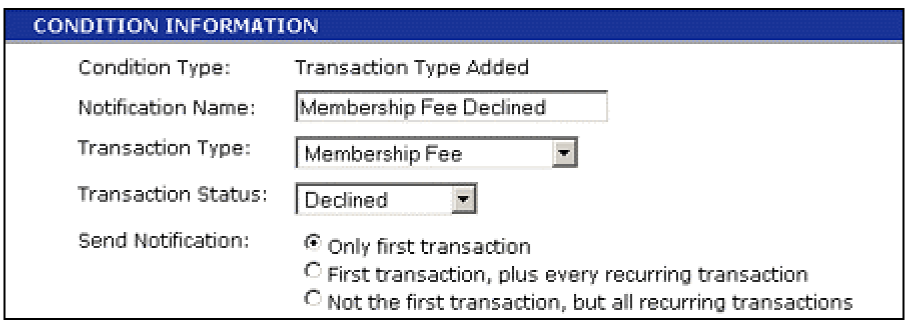
Field	Description
Notification Name	Anything you wish.
Transaction ID	The transaction that must be added to a member's account in order for the notification to be processed.

Transaction Status	The status the transaction must be, in order for the notification to be processed.
Send Notification	This is only applicable for recurring transactions, and allows you to specify which transactions the notification should be processed for. You can specify only the first transaction, only recurring transactions, or not the first transaction, but all recurring transactions.

Using the above image as an example, the notification will be automatically processed every time the ID# 109 membership fee transaction is approved. The notification will be processed for both, the first transaction and all recurring transactions.

Transaction Type Added

Asks for information on the transaction that must be added in order for the notification to be processed, and looks like:



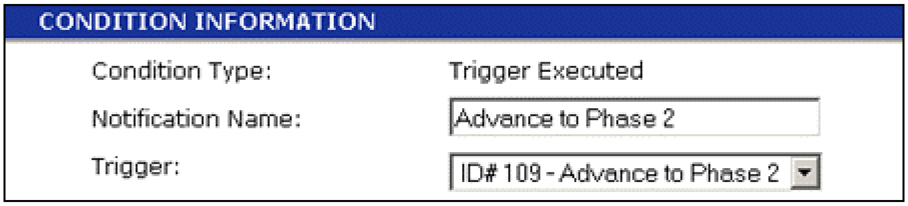
Complete the section shown above with the following information:

Field	Description
Notification Name	Anything you wish.
Transaction Type	The type of transaction that must be added, in order for the notification to be processed.
Transaction Status	The status the transaction must be, in order for the notification to be processed.
Send Notification	This is only applicable for recurring transactions, and allows you to specify which transactions the notification should be processed for. You can specify only the first transaction, only recurring transactions, or not the first transaction, but all recurring transactions.

Using the above image as an example, the notification will be automatically processed every time a membership fee transaction is declined. The notification will only be processed for the first membership fee transaction, and no recurring transactions.

Trigger Executed

This sections asks for information on the trigger that must be executed in order for the notification to be processed, and looks like:



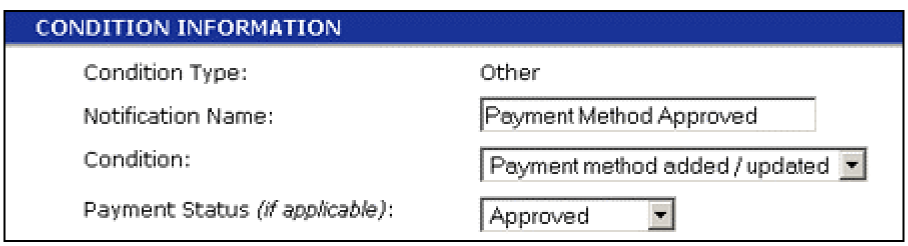
Complete the section shown above with the following information:

Field	Description
Notification Name	Anything you wish.
Trigger	The trigger that must be executed in order for the notification to be processed.

Using the above image as an example, the notification will be automatically processed every time the ID# 109 trigger is executed.

Other

This section asks for different information on what action must occur in order for the notification to be processed, and looks like:



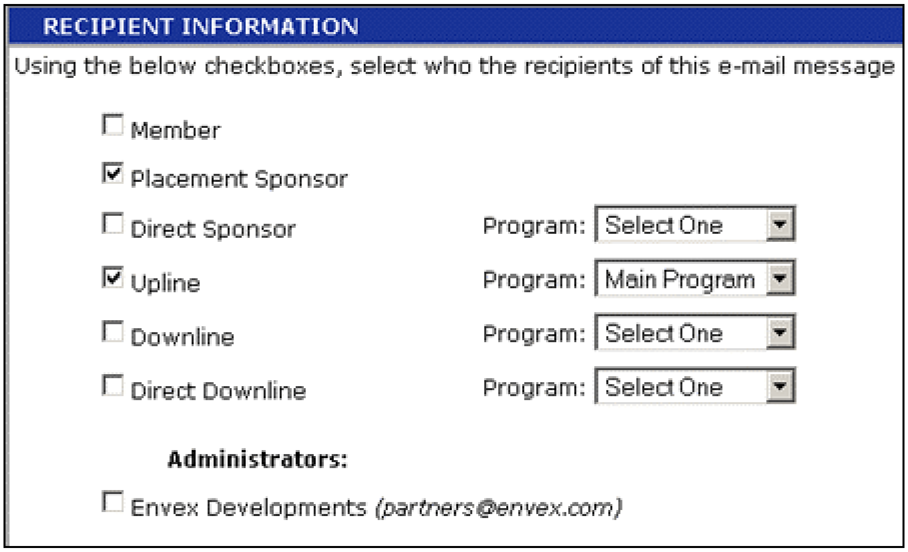
Complete the section shown above with the following information:

Field	Description
Notification Name	Anything you wish.
Condition	The condition that must occur in order for the notification to be processed.
Payment Status	Only applicable if you selected *"Payment method added / updated"* as the condition, and allows you to select the status of the payment method.

Using the above image as an example, the notification will be automatically processed every time a payment method is added or updated with a status of approved.

5.3.2 Recipient Information

The second section on this page asks for the recipient information, and looks like:

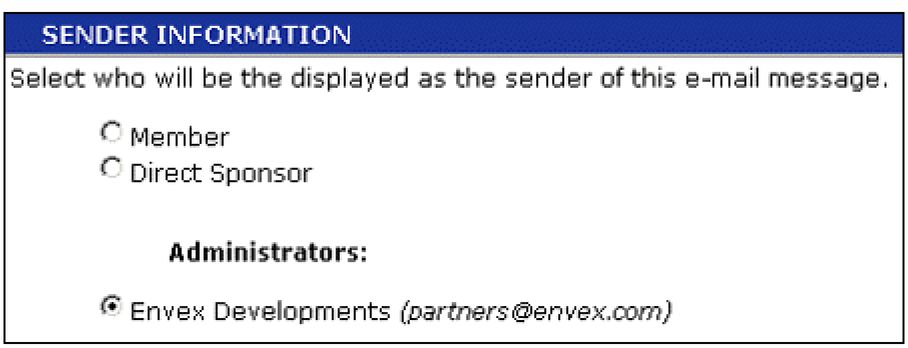


This section allows you to select exactly who will receive the e-mail message, when the notification is processed. The recipients are relative to the member who the notification is being processed against. For example, with the above image, if a new member is created the e-mail message would be sent to the new member's placement sponsor and upline.

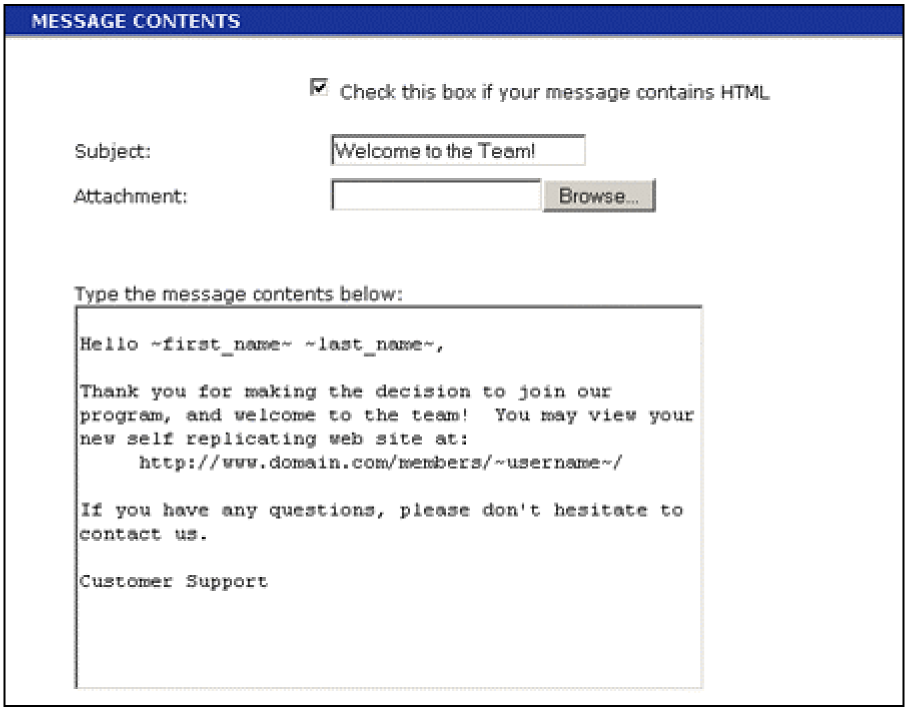
Several of the options ask for a program structure as well. This means the selected genealogy information will be taken from the selected program structure.

5.3.3 Sender Information

The last section on this page asks for the sender information, and looks like:



This section allows you to specify who the sender of the e-mail message is. Simply select who you would like placed in the *'From:'* line of the e-mail message, and submit the form to continue. The next page allows you to specify the contents of the e-mail message, and looks like:



Enter the contents of the e-mail message in the provided box. You may personalize the e-mail message by using merge fields. At the top of the screen, there are several boxes containing various fields that the e-mail message can be personalized with. Click on one of the fields, and the needed merge field will be automatically placed inside the contents of the e-mail message. When the e-mail message is sent, the merge field will be automatically replaced with the appropriate personalized information.

Once you've entered the contents of the e-mail message, submit the form to save the notification. Continue creating notifications as described above, until you have created all desired notifications for your business.

5.4 Manage Administrators

xFlow allows you to create multiple administrators, and give each of them restricted access to the Admin Control Panel. Each administrator will have their own username and password to access the Admin Control Panel, and you can define exactly what actions they can and can't perform.

Administrators can be created and managed through the *Other->Manage Administrators* menu. This page contains two sections, which are described below.

5.4.1 Existing Administrators

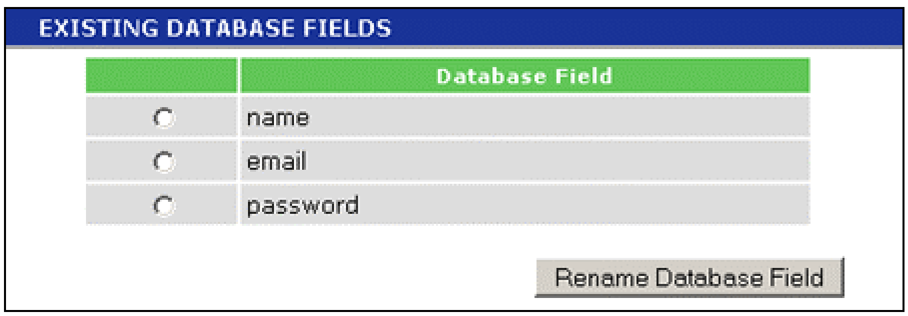
This section contains one table, listing all existing administrators in your database who have access to the Admin Control Panel. You can edit or delete any of the administrators, by selecting the needed administrator, and clicking on the appropriate submit button.

5.4.2 Create New Administrator

This section allows you to create a new administrator. The first four questions ask for the profile of the new administrator. The username and password you enter here is what the administrator will use to access to the Admin Control Panel. The rest of this section allows you to define exactly which actions the administrator may perform. If the administrator tries to perform any action that is not checked, they will receive an error message stating they do not have authorization to perform the action.

5.5 Manage Database Fields

There may be times when you need to modify the fields in your database after you've started your business. You can manage the fields in your member database through the *Setup->General Settings* menu. Once there, click on the *"Manage Database Fields"* submit button at the top of the page. The first section on the page looks something like:



This section contains all fields currently in your member database, and allows you to rename any field. The second section on this page allows you to add fields to your member database. Due to technical restrictions, there is no way to delete fields from the member database. Instead, you can only add and rename fields.

5.5.1 Update New Database Fields

After you have added new fields to your member database, you may want to specify a default value for the new field(s) for every member's profile. You can instantly update all member's profiles through the *Other->Perform Mass Action* menu. Leave all fields on the first page blank to select all members in your database, and on the second page, select *"Edit field in member database"* as shown below.

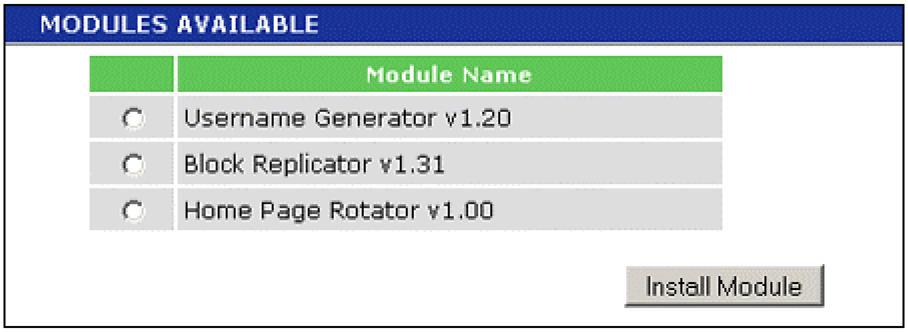
On the third and last page, simply select the field in your member database you would like to update, and specify the desired value. Then submit the form, and all member's profiles will be instantly updated with the new value for the selected database field.

5.6 Installing Upgrades / Modules

xFlow contains an automated upgrade / module installation feature, which is linked directly to the Envex Developments upgrade server. You can view all upgrades and modules that are available through the *Setup->Install Upgrades / Modules* menu. Click on the *"Retrieve Upgrade / Module"* submit button, and xFlow will contact the Envex Developments upgrade server, and retrieve information on all upgrades and modules available to you.

5.6.1 Install Modules

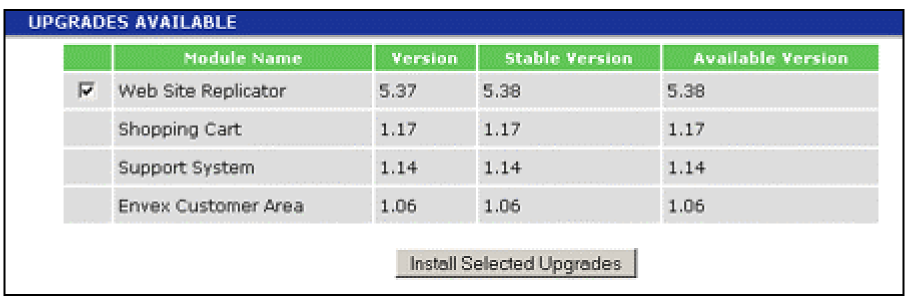
The first section on the next page lists all modules available to you, and looks like:



Select the module you would like to install, and click on the *"Install Module"* submit button. The module will be queued for installation on your server, and will be automatically installed on your server within 30 minutes. You can uninstall an already installed module at any time through the first page of the *Setup->Install Upgrades / Modules* menu.

5.6.2 Install Upgrades

The second section on this page lists the upgrades available for each installed module, including the main xFlow, and looks like:



For each installed module, the table shows the version your server is currently running, the latest stable version as received from the Envex Developments upgrade server, and the version that is available to you. If there are upgrades available for a module, a checkbox will appear in the first column. Select which module(s) you would like to upgrade, and click on the *"Install Selected Upgrades"* submit button. The upgrades will be automatically installed on your server within 30 minutes.

6.) Membership System

The membership system is the main system of xFlow, and controls all core information on members. This includes things such as member's profiles, member type, status, and so on. This section explains how to perform the basic functions on members.

6.1 Creating Members

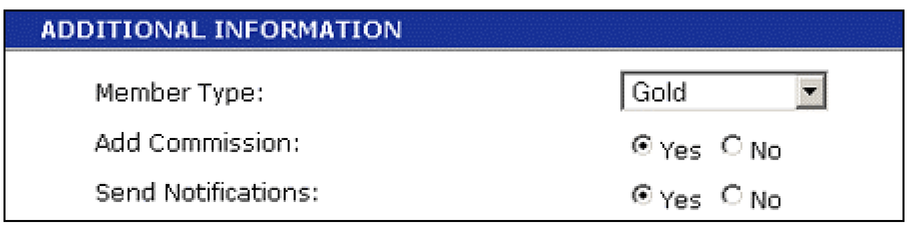
You can manually create new members through the *Database->Create New Member* menu of the Admin Control Panel. This will create a new member in the database, add them to all needed downlines, process all needed transactions, send out all needed notifications, and create the new member's self replicating web site.

6.1.1 Member Profile

The first section titled Member Profile, asks for the member's contact information. The only fields required in this section are the username, e-mail address, and password of the new member. In the sponsor field, you must enter the username of the new member's sponsor. If the new member does not have a sponsor, simply leave the Sponsor field blank.

6.1.2 Additional Information

This section asks up to three questions, and looks like:



If you use more than one member type, there will be a select box asking for the member type of the new member. The next question asks if you would like to add commission or not. If yes, all needed commission transactions will be automatically processed for the new member. The last questions asks if you would like to process notifications or not, meaning, if you would like the appropriate e-mail messages previously created through the *Communicate->Notification Settings* menu sent out.

6.1.3 Deposit Information

This section allows you to specify a payment method that is used for all deposits into the member's account, for things such as membership fees. If you do not want to add a deposit method for this member, simply check the Override checkbox. The one question in this section asks if you would like to process transactions, or not. If yes, all membership fees will be automatically added to the member's account, but if you select no, the member will not be charged any membership fees.

6.1.4 Withdraw Information

This section allows you to specify a payment method that is used for all withdrawals, such as commission payouts. If you do not wish to add a withdraw method for the new member, simply check the Override checkbox. Please note, members can add new payment methods through the Member's Only Area, at a later time.

Once you've completed the form, click on the *"Create New Member"* submit button to create the new member in your database.

6.2 Editing Members

There will be times when you need to edit a member, such as their profile or member type. This can be done through the *Database->Edit Member* menu where you will first be prompted for a member's username or ID number. The first section on the next page titled Member Profile, allows you to change any of the member's current profile information.

6.2.1 Change Member Type

The section allows you to change the member type of the member, by selecting the new member type in the provided select box. The first question asks how you would like all previous commissions handled, which were previously added for the member.

The next question asks if you would like commission added to the member's upline. If yes, all sign up commission transactions for the will be processed for the member, under the new member type. The third question asks if you would like all membership fee transactions processed, and if yes, will add all membership fee transactions for the new member type, and withdraw the needed amount from the member's account.

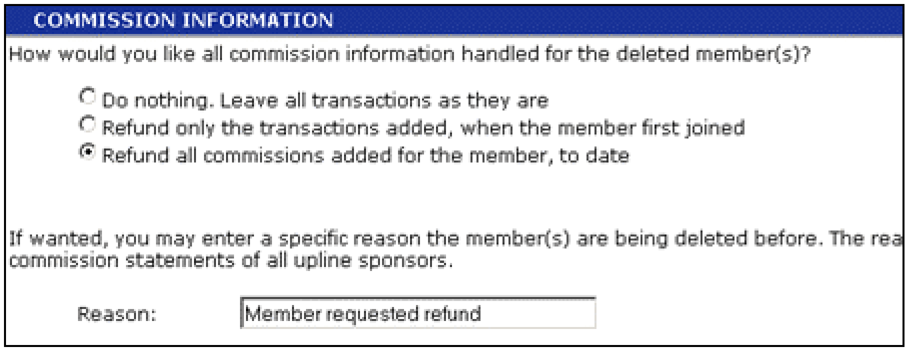
The last question asks if you would like the upgrade fee transactions processed. If yes, all upgrade fees for the new member type will be automatically processed against the member's account.

6.3 Deleting Members

There will be many times when you need to delete members from your database. This can be done by going to the *Database->Delete Member* menu of the Admin Control Panel, where you will first be prompted for the username or ID number of a member. You may delete multiple members at once by specifying a comma delimited list of usernames.

6.3.1 Commission Information

The last section on the next page titled Commission Information contains two questions, and looks like:



The first question asks how you would like all commissions handled that were previously added for the member. The second question allows you to specify a reason why the member is being deleted. This reason will show up in all withdrawal transations added to member's accounts due to commissions being refunded.

Once you have completed the two questions, click on the *"Delete Member"* submit button to delete the member(s). Please note, once a member has been deleted, they are permanently removed from the database, and there is no way to undelete them. However, a summary is created for every member deleted, which can be viewed at a later time through the *Database->View Deleted Member* menu.

6.4 Viewing Members

You can view a full, detailed summary of a member's account through the *Database->View Member* menu. The summary includes the member's profile, an overall summary of all downline positions, and an overall summary of all transactions processed on the member's account.

6.4.1 Downline Summary

This section contains one table, listing all downline positions for the member. You can see the total number of members, and total number of recruits for each downline position. If wanted, you can view full details and manage the member's genealogy by clicking on the *"Manage Geneology"* submit button.

6.4.2 Transaction Summary

This sections contains an overall summary of all transaction processed on the member's account. You can see a summary of the total withdrawals, deposits, plus all pending transactions on the member's account. The numbers in brackets "()" represent the number of transactions. This section also contains a table, giving a summary of the past six months of account activity.

6.5 Deactivating Members

You can deactivate members through the *Database->Deactivate Member* menu. When a member has been deactivated, their member status will change to inactive, their self replicating web site will be deactivated, and will no longer have access to the Member's Only Area. When someone views the member's self replicating web site, they will receive an error message, stating their account has been temporarily deactivated, and to try again later.

6.6 Activating Members

Once a member has been deactivated, you can reactivate them through the *Database->Activate Member* menu. This will reactivate the member's self replicating web site, and once again allow them to access the Member's Only Area. There is a Commission Information section on the page that asks if you would like all sign up commission transactions processed. You may want to select yes, if for example, all members start out as inactive when they first join, and you don't want to add commission until you've manually activated the member.

6.7 Query All Members

From time to time, you will need to query your member database to find specific members. This can be accomplished through the *Database->Query All Members* menu. The first section on this page titled "*Member Profile"*, contains one text box for every field in your member database. If you need to search for a member's contact information, enter the needed search terms in these text boxes. Any text boxes left blank will be omitted from the search.

6.7.1 Additional Parameters

The additional parameters section allows you to further narrow your search by defining things such as the member status, type, total downline size, current account balance, and so on. If wanted, you can leave any or all fields blank.

6.7.2 Query Results

After you fill out your search terms, and submit the form, a new page will appear containing a table that lists all members who matched your search criteria. There are several submit buttons at the bottom of the page, three mass actions, and four single actions. You may select several members if you would like to perform any of the mass actions, but can only select one member for the other four actions.

6.8 View Deleted Members

A summary is created for every member deleted, and stored in a separate area of the database. You can view the summary of any deleted member through *Database->View Deleted Member* menu. The first page shows a text box for every field in your member database. You need to specify at least one search time that you would like to search all previously deleted members for.

If only one deleted member matches the search terms you specify, that member's summary will immediately appear. Otherwise, a list of all members matching the search criteria will be displayed, allowing you to select which one to view. The summary itself is basically the same as when you view a member through the *Database->View Member* menu.

Please note, no other information is available on deleted members except the summary. There is no way to view information such as individual transactions, or the exact downline members.

7.) Genealogy System

The genealogy system handles all downline information, from creating downline positions, to re-cycling matrixes, to compressing a matrix when a member is deleted. This chapter explains all functions of the genealogy system, and how to perform different actions on the downlines.

7.1 Overview

xFlow maintains a database of downline positions. Instead of physically placing members into the downlines, only positions are added to the downlines, which act as "pointers" to members. Every downline position is assigned to a specific member, and program structure. This allows for things such as, re-cycling matrix support, multiple downline positions, greater flexibility and reliability, and so on.

The downlines themselves consist of a database of downline positions, each position pointing to a specific member in the database. For example, to retrieve a member's downline, the software will first retrieve all downline positions assigned to that member. Then, will search the downlines themselves for those positions.

7.2 The Downline Structure

A member's downline consists of three things:

<u>*1. Direct Sponsor*</u> – Assigned to every downline position created. This is the sponsor who the member was placed under, and if using a forced matrix, the sponsor which the software began searching the matrix for the next available empty spot.

<u>*2. Upline*</u> – When a new member is placed in the downline under the direct sponsor, they are also assigned an upline. The upline is basically the members who are above in the program structure. The upline can consist of as many members, as how many levels deep the program structure is. For example, if the program structure if five levels deep, each member's upline can consist of a maximum of five members.

<u>*3. Downline*</u> - The people who join under a member, and are placed under the member in the downline.

Each member is also assigned one Placement Sponsor. When a new downline position is created for a member, they are placed in the downlines under their placement sponsor. When a new member first joins, the placement sponsor is always the sponsor they joined under. However, you can change the placement sponsor of a member at any time through the *Genealogy->Manage Downline* menu.

7.3 Adding Downline Positions

This section describes exactly how xFlow places new members into the downline. Regardless of the program structure, xFlow goes through the same basic steps.

1. Gather a list of program structures to add the member to. This is done by the software checking the member type, and seeing which program structures have been checked to add the member to. If needed, the member will also be scheduled to be added to the sponsor's default program structure, if the member isn't already, unless you specifically stated for this not to happen during First Time Setup.

xFlow will go through every program, and complete the following steps:

2. The direct sponsor is determined. This is always the sponsor, who the member joined under, unless it's a X-Up program structure. If an X-Up program structure, the software will check qualifying members as needed, and determine the correct direct sponsor.

3. Using the direct sponsor, the software determines the upline for the new member. If it's a network (unlimited width) program, the software simple takes the direct sponsor's upline, and uses that. However, if it's a forced matrix program, the software will search the matrix for the next available spot, as explained below.

4. A blank downline position is added to the program structure, for the new member.

5. The newly created downline position is updated with the member's upline. While doing this, any needed geneology triggers are executed.

6. If needed, all commission transactions are processed.

7.3.1 Searching the Matrix

If a member is being added to a forced matrix, the software must first search the matrix, and find the next empty spot. xFlow places all spillover equally, throughout the matrix, instead of giving all spillover to the left most members. The members with the smallest first level downline are always favored.

When the matrix is searched, the software starts at the direct sponsor, and will check for an empty spot in the first level downline. If there is no empty spot, the software will take the direct sponsor's first level downline, and check their first level downline for empty spots, at the same time. Next, the software will check the first level downline of all the first level downline members, and so on. The software will continue checking for an empty spot on groups of members like this, until an empty spot has been found.

If more than one empty spot in a group is found, the software will favor the member with the least number of members on their first level downline. If more than one member have the same lowest number of downline members, the software will favor the left most member.

Once a member has been found, who has an empty spot, the software will retrieve the member's upline. The software then goes through each upline member, and checks to ensure upline member has an open spot on the needed downline level. If at any time, an upline member does not have an empty spot, the software will stop, and drop the rest of the upline, to ensure the matrix never becomes corrupt.

7.4 Deleting Downline Positions

xFlow uses a different process to delete downline positions, depending on the program structure. Below explains how xFlow deletes downline positions from each program structure.

7.4.1 Network (unlimited width)

When a downline position is deleted from a network (unlimited width) program structure, the software moves the existing downline members up one level in the program structure. The direct sponsor of the downline position's direct downline is also transferred up one level.

However, if compression is off for the program structure, a blank spot will be created in the downlines, where the member used to be.

7.4.2 Forced Matrix

If full compression is turned on, starting with the downline position being deleted, the software will cycle through the matrix, and take the left most member on each first level downline, until it hits the bottom of the matrix. For each left most member, the software will compress the member up one level in the downlines. When a member is compressed up, their entire downline and upline will change to the position they are taking over.

If no compression is on, the software simply deletes the downline position from the matrix, without any compression, and leaves a blank spot where the position used to be.

7.5 Manage Downline

You can manage a member's downline through the *Geneology->Manage Downline* menu of the Admin Control Panel. At first, you are prompted the username or ID number of a member. The next page shows a summary of the member's current geneology.

7.5.1 Default Program Structure

This section allows you to change the member's default program structure. When someone joins under this member, they will be placed in the member's default program structure. For example, if the member's default program structure is **B**, and someone joins and is placed in the program structure **A**, they will also be placed in **B**, so the sponsor gets credit for the new member.

7.5.2 Upline Information

This section simply shows all upline members, for every program structure the member has a position in. If needed, you may change which information is displayed, by going to the *Setup->General Settings->Upline / Downline Views* menu of the Admin Control Panel.

7.5.3 Downline Information

This section shows a table for every downline position the member has, grouped by each program structure. Each table gives a summary of how many members are in each downline level. For forced matrix program structures, there will also be a *Direct* level, which represents everyone who joined directly under the member, regardless of where they were placed in the matrix. There is also a *More Info* link beside each downline level, which allows you to view details of all downline members.

You may also transfer or delete any downline position, by clicking on the appropriate submit button. When you transfer a downline position, it will be removed from the existing member, and assigned to the new member you specify. From then on, the new member will receive all commissions for all downline members, and so on. When you delete a downline position, it will be completely removed from the database, and if needed, the downlines will be compressed.

7.6 Change Sponsor

There will be several times where you need to change a member's sponsor, which can be done through the *Geneology->Change Sponsor* menu of the Admin Control Panel. You are first prompted for the username or ID number, of the member who's sponsor you would like to change. The next page contains an Additional Information section, which asks several questions.

The first question asks how you would like the member's sponsor changed, and gives three choices:

- **Change the member's placement sponsor –** Every member is assigned a placement sponsor. This is the sponsor the member is placed under, when a new downline position is created. This option will simply change the member's placement sponsor, and will not modify any downlines, or other information.

- **Delete position, and re-add member –** This will delete the member's current downline position(s), just as if the member was being deleted from the database. Then, the member will be added back into the program structure(s), under the new sponsor, just as if they first joined.

- **Move downline organization –** This will move the member, along with their entire downline, under the new sponsor. If a forced matrix program, there must be enough empty spaces in the matrix, to move the entire downline over. This is to ensure the matrix never becomes corrupt.

The second question asks which program structures you would like affected. For example, if you selected the second or third options in question #1, the action will only effect the selected program structures. All downline positions in other program structures will be left exactly as they are.

The third and last question asks for the username or ID number of the new sponsor. If needed, you may leave the fields blank, if the member no longer has a sponsor. Once done, click on the *Change Sponsor* submit form, to perform the needed actions.

7.7 Scramble Downlines

An experimental feature has been added, which allows you to scramble all downlines, and can be performed through the *Genealogy->Scramble Downlines* menu of the Admin Control Panel. This will transfer downline positions to other members, as you need.

The only section on this page is titled Scramble Specifications, and allows you to define exactly how the downlines will be scrambled. The first question asks for the program structure, which will be scrambled. The next two questions are optional, and allow you to select the member status and type, which will be affected. Only members who meet the selected criteria will be scrambled.

The bottom sentence allows you to define how to scramble the downlines. You can choose whether you would like to change a certain number or percentage of members, and whether to rotate them sequentially or randomly. If you select sequentially, the software will rotate member for member, in exact place. For example, the top member, will be replaced with the bottom member, the second with the second, and so on. If you select randomly, the software will take all top and bottom members, and rotate them manually.

7.8 Query All Downlines

You can query all member's downlines, for specific terms, through the *Genealogy->Query All Downlines* menu of the Admin Control Panel. You can query the downlines for different information, by completing any wanted fields in the Additional Information section. This will display a list of all members who match your search criteria, and allow you to manage their geneology.

8.) Transaction System

The transaction system handles all financial aspects of your business, including membership fees, commissions, product / service fees, plus more. Every thing involving funds goes through the transaction system. Every member receives their own transaction account, which works similarly to a bank account. The transaction system is a one-way system, meaning once a transaction has been added, there is no way to modify or delete it.

8.1 Transaction IDs

Every transaction is assigned a unique ID#, formatted in the following way:

TTTEUUUUU-NNNNN

TTT	The transaction type. Will be one of the following: • COM – Commission • DEP – Deposit • WTD – Withdraw • PAD – Commission Payout • MSC – Miscellaneous
E	Internal code used by the software
UUUUU	The ID# of the member
NNNNN	A sequential number, starting at 1, and incrementing by 1 for every transaction.

8.2 Transaction Index

xFlow allows you to create an index of transactions. There are nine different types of transactions you can create, which include commissions, membership fees, product / service fees, etc. For every transaction, you must define a condition. Every time that condition is met, the transaction will be automatically processed.

You may view full information on all transaction types, and how to create transactions, by going to *Section 5.2 Transaction Settings*.

8.3 Manage Transaction Account

You can manage a member's transaction account through the *Transaction->Manage Account* menu, where you are first prompted for the username or ID number of a member. The first page shows an overall summary of the member's transaction account.

8.3.1 Transaction Summary

This section shows a monthly summary of all transactions added to the member's account since they joined, and looks like:

TRANSACTION SUMMARY

Month	Deposits	Withdrawals	Ending Balance	View Details
October, 2004	$47.95	$15.95	$32.00	[View Details]

This table contains one row for every month the member has been in the database. Each row shows the total amount in deposits and withdrawals added to the member's account that month, and their ending balance at end of the month. You can view a list of all specific transactions added during any month, by clicking on the appropriate *"View Details"* link. The next page will give a quick summary of the month, and list all specific transactions during that month, which looks like:

TRANSACTION INFORMATION

Quick Jump: | 1-10 |

Date	Description	Deposit	Withdraw	Balance
October 05, 2004	Deposit (DEP00002)	$15.95		$15.95
October 05, 2004	Membership Fee (WTD00001)		$15.95	$0.00
October 05, 2004	SIGN - mwagner (COM00005)	$5.00		$5.00
October 05, 2004	DIRECT - mwagner (COM00006)	$7.00		$12.00
October 05, 2004	SIGN - jsmith (COM00010)	$4.00		$16.00
October 05, 2004	SIGN - lori (COM00015)	$4.00		$20.00
October 05, 2004	SIGN - moneyman (COM00019)	$5.00		$25.00
October 05, 2004	DIRECT - moneyman (COM00020)	$7.00		$32.00

The transaction system has been designed to resemble a bank account. With each transaction you can see the date the transaction was added, a small description, the amount, and the new account balance. You can view full details on any specific transaction by clicking on the description link.

8.3.2 Pending Transactions

This section shows all pending transactions on the member's account, and looks like:

PENDING TRANSACTIONS

The below table shows all pending transactions currently on the member's account. Pending deposits are transactions, which are currently awaiting payment *(eg. PayPal)*. Pending withdrawals are generally commiss payouts, which are waiting to be processed.

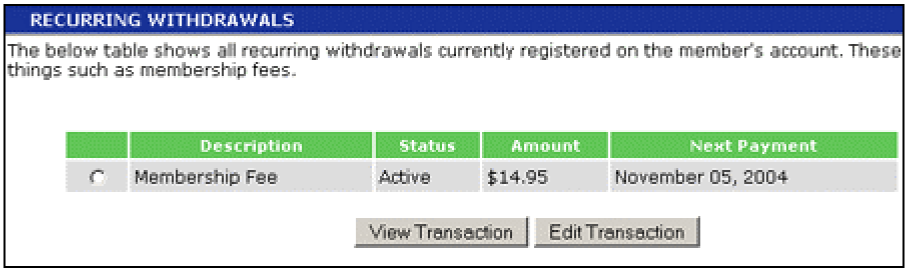
Transaction ID	Description	Deposit	Withdraw	Pay Now
DEP100001-00022	Deposit	$15.95		[Pay Now]
WTD100001-00021	Membership Fee		$15.95	Not Applicable

Pending transactions are transactions that have not yet been added to the member's account, because they are awaiting processing of some kind. Normally, these are payments that the member has not yet physically paid. For example, when a member selects to pay their membership fee through PayPal, a pending transaction is added to their account, and they are automatically redirected to PayPal to submit payment. Once payment has been submitted, the transaction will be automatically approved and added to the member's account, but until then, will remain as pending.

You can view full details on any pending transaction by clicking on the transaction ID link. If the transaction is for a payment, there will be a *"Pay Now"* link that will take you directly to the payment processor to submit payment. Alternatively, you can manually approve any pending payments through the *Transaction->Pending Deposits* menu.

8.3.3 Recurring Withdrawals

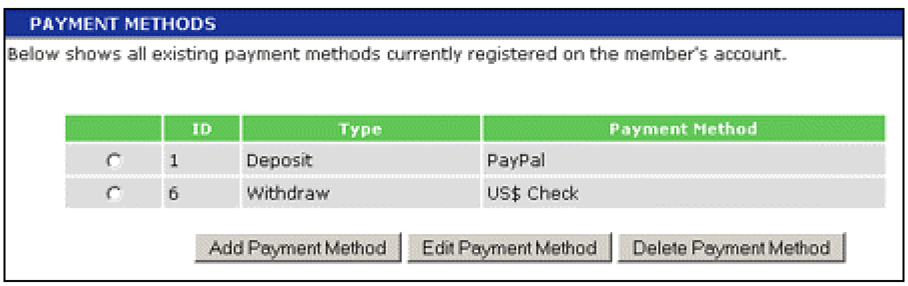
This section contains one table that lists all recurring withdrawals on the member's account, and looks like:



Recurring withdrawals are usually things such as membership fees, and product / service fees. Every night at 3:00am server time, a script will automatically execute via crontab and process all recurring withdrawals that are due that day. You may view or edit any of the recurring transactions in the table, and changes things such as the status of the transaction, or the next payment date.

8.3.4 Payment Methods

This section contains one table that lists all payment methods registered on the member's account, and looks like:



xFlow allows deposit and withdrawal payment methods to be registered against each member's account. The deposit payment methods are used to physically charge members for things such as membership fees, and the withdraw payment methods are used to send funds to members, such as commission payouts.

You can add, edit or delete payment methods on the member's account by clicking on the appropriate submit button. When you add or edit a payment method, you will notice a *Default Payment* field. The member's default payment method is used for all transactions. For example, when a member is physically charged, their default deposit method is charged. When commission is paid out to a member, their default withdrawal method is used.

8.4 Processing Payments

There are three different types of payment processors supported by xFlow, which are real-time credit card processors, third party processors, and manual processing.

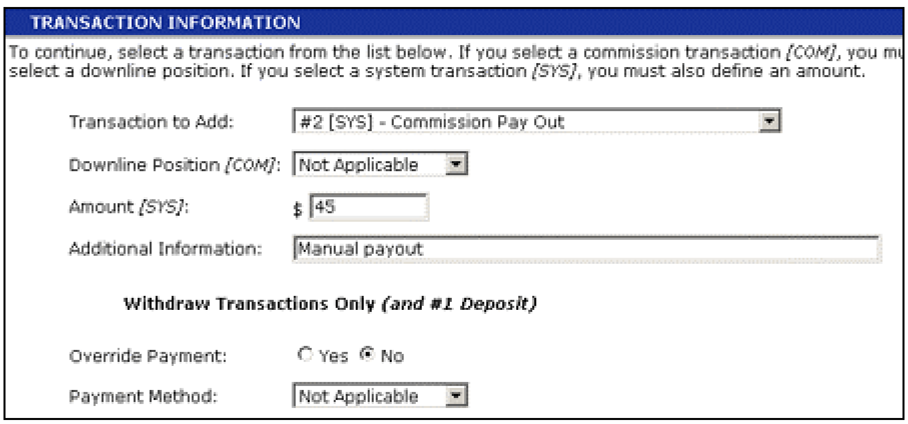
With real-time credit card processors such as AuthorizeNet, all transactions stay on your server, instead of being redirected to a third party payment server. Every time a credit card is charged, xFlow will instantly send payment details to the processor. The processor will then immediately give a response, saying whether or not the charge was approved. This entire process happens instantly behind the scenes, and only takes seconds.

Third party processors such as PayPal and 2CheckOut require the user to submit payment on their server. Every time a member is charged, xFlow will redirect the member to the needed payment server, where they can submit payment. Once payment has been submitted, the payment server will immediately send a request to xFlow, containing information on the payment. This information is taken in, and the appropriate transaction is automatically approved.

Manual processing allows you to use payment processors not supported by xFlow. Every payment is added as a pending deposit, and must be manually approved through the Transaction->Pending Deposits menu, after you have manually verified the payment has been received.

8.5 Add Transaction

From time to time, you will need to manually add a transaction to a member's account, which can be done through the *Transaction->Add Transaction* menu. You are first prompted for the username or ID number of a member. On the next page, the second section is titled Transaction Information, and looks like:


TRANSACTION INFORMATION

To continue, select a transaction from the list below. If you select a commission transaction *[COM]*, you mu
select a downline position. If you select a system transaction *[SYS]*, you must also define an amount.

Transaction to Add: #2 [SYS] - Commission Pay Out

Downline Position *[COM]*: Not Applicable

Amount *[SYS]*: $ 45

Additional Information: Manual payout

Withdraw Transactions Only *(and #1 Deposit)*

Override Payment: Yes No

Payment Method: Not Applicable

The first question has a select box containing all transactions in your index, allowing you to choose exactly which transaction you would like to add. Please remember, the transaction will be processed against the member, and not necessarily added to the member's account. For example, if you are adding a commission transaction, the commission will be added to the member's upline, and not the member themselves.

The second question asks for a downline position, and is only required if you are adding a commission transaction. This is the downline position used to determine the recipients of the transaction. The next question is only required if you selected a system *([SYS])* transaction, and asks for the exact amount. If wanted, you may also specify a note in the Additional Information field, which will be shown when someone views details of the transaction.

There are three questions, which are only applicable if you are adding a withdraw transaction. The first question asks if you would like to force payment or not. If yes, the software will physically charge the member the full amount of the transaction. Otherwise, the software will deduct the amount from the member's existing account balance, and if needed, physically charge the member for any difference.

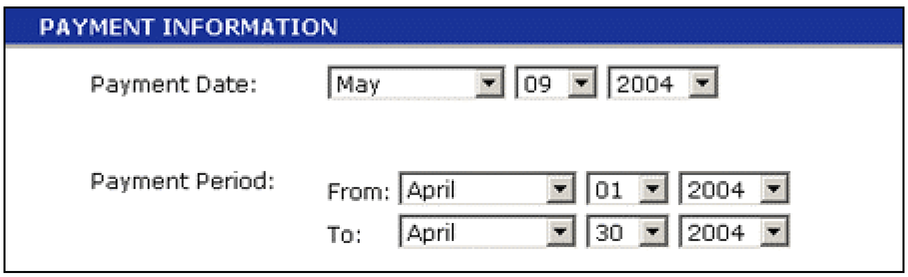
The second question asks if you would like to override payment or not. If yes, the member will not be physically charged for the transaction. The last question allows you to select a payment method, which will be used to charge the member for the transaction.

8.6 Paying Commissions

You will most likely need to pay out commissions to your members every once in a while. This can easily be done through the *Transaction->Pay Commissions* menu. Instead of immediately adding the commission payouts as transactions to the member's accounts, they are added to pending withdrawals. You can then process all pending withdrawals, and physically send the funds, through the *Transaction->Pending Withdrawals* menu, which is explained later in this chapter.

8.6.1 Payment Information

This section contains two questions asking for different dates, and looks like:



The first question asks for the Payment Date. This should be set to the date the commissions are physically sent to the members. For example, if you are mailing commission checks or paying via PayPal, this should be the date you physically mail the checks, or send the funds through PayPal.

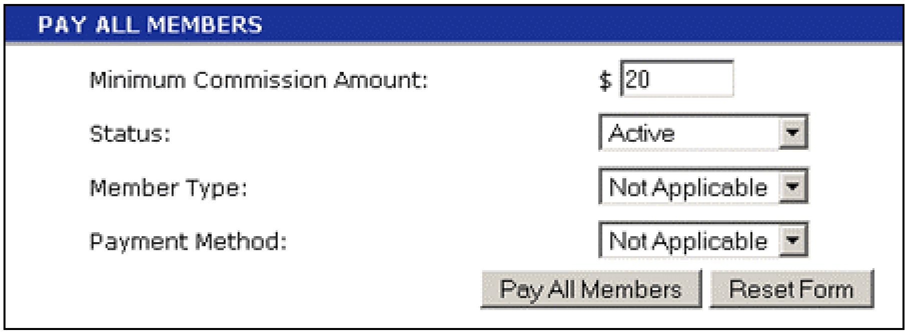
The next question asks for the Payment Period. This is the time period for which commissions are being paid out. Using the above example, commissions earned between April 1st, 2004 and April 30th 2004 will be paid out. Any commissions earned after April 30th will not be included in the commission run.

8.6.2 Pay Specific Member

Instead of paying all members, you can use this section to pay only specific members. Simply enter the username or ID number you would like to pay commission to, and click on the *Pay Specific Member* submit button. You may pay multiple members at once by entering a comma delimited list of members, such as *jsmith,mike,moneyman,bob*, would pay all four members at once.

8.6.3 Pay All Members

This section allows you to pay all members in your database at once, and looks something like:



All four questions in this section are optional. The first question asks for the minimum commission amount. If the amount owed to a member is less than the amount you specify, no commission will be paid out for the member. Instead, the commission owed will be held over until you pay commissions again.

The next three questions allow you to specify the status, member type, and payment method. If you specify any of these fields, commission will only be paid out for members who meet the criteria. Using the above example, commission will only be paid out to Active members who are owed at least $20 in commission.

8.7 Pending Withdrawals

You can process all pending withdrawals, which are normally commission payouts, through the *Transaction->Pending Withdrawals* menu. This page contains one section that looks like:

This table contains one row for every withdraw payment method you created through the *Setup->Payment Settings* menu, and gives a summary of all pending withdrawals. The number of payments, and total amount of all payments are shown for each payment method. You can view a list of all transactions for each payment method, by clicking on the appropriate *View Details* link.

For several payment methods the *"Download File"* link will be available, which allows you to download the needed mass pay file. This file can then be imported into the appropriate service or program, and automatically pay all members instantly.

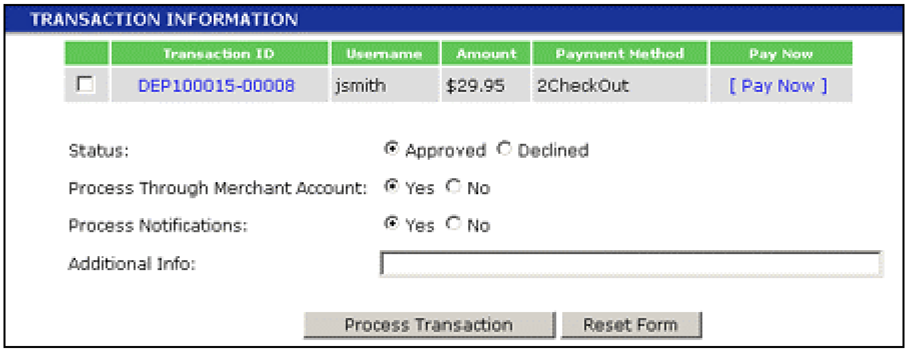
Once you have physically sent the funds, you need to process the withdrawals. Simply check the appropriate payment methods in the table, and click on the *"Process Selected Withdrawals"* submit button. This will take all checked pending withdrawals, and add them as actual transactions to the member's accounts.

You may also delete the any needed withdrawals by checking the needed payment methods, and clicking on the *Delete Selected Withdrawals* submit button.

8.8 Pending Deposits

You can manually process any pending deposits through the *Transaction->Pending Deposits* menu. These are transactions, which are either still waiting for the member to submit payment through a third party payment processor (eg. PayPal, 2CheckOut), or credit card charges that have only been authorized, and still need to be captured (fully charged).

The page contains one section, which looks something like:



The table lists all pending deposits currently in your database. For deposits made through a third party payment processor there is also a *Pay Now* link, which you can click on to be automatically redirected to the payment server. To process deposits, check all transactions you would like to process, then complete the few questions, and click on the *Process Transaction* submit button.

The first question asks for the status of the transaction, and can either be approved or declined. The second question asks whether or not you would like to process the transaction(s) though your merchant account. This is only applicable if you are using a real merchant account (eg. AuthorizeNet, VeriSign, Moneris Solutions). If yes, the software will automatically send a request to the merchant account behind the scenes, to capture the credit card authorization.

The third question asks if you would like to send e-mail notifications or not. If yes, the software will check the existing notifications you created through the *Communicate->Notification Settings* menu, for any matching the transaction, and send out the appropriate e-mail messages. The last question allows you to specify an additional note, which will be displayed when someone views details of the transaction.

8.9 Pending Payment Methods

If you allow members to add new payment methods to their account through the Member's Only Area, and if your settings state all new payment methods must be approved by the administrator, you can process them through the *Transaction->Pending Payment Methods* menu. This page contains one section, which lists all pending payment methods. Simply check the needed payment methods, select whether they are approved or declined, and click on the *Process Payment Methods* submit button.

8.10 Query All Transactions

xFlow allows you to query all transactions in your database, through the *Transaction->Query All Transactions* menu. Simply fill out the form with any needed search terms you would like to search the transaction database for. Any fields left blank will be omitted from the search. The software will search the database, and display a list of all single transactions, which matched your search criteria.

9.) Notification System

The notification system allows you to easily and efficiently communicate with your members. You can create an index of notifications, and with each, you define a condition, recipient and e-mail message. The notification system then monitors all actions performed by xFlow, and when needed, will automatically send out the needed e-mail message.

For full details on how to create notifications, please visit *Section 5.3 Notification Settings*.

9.1 Send Notification

Even though all notifications are automatically sent by xFlow, you may need to manually send a notification from time to time. This can be done though the *Communicate->Send Notification* menu. You are first prompted for the username or ID number of a member, and the second page lists all existing notifications, allowing you to select exactly which one to send.

Please note, the e-mail message itself might not be sent to the member you specified. The software will determine who to send the e-mail message(s) to, depending on the recipient you defined when creating the notification. For example, if the recipient is set to the member's upline, then the e-mail message will be sent to the member's upline, and not the actual member.

9.2 Send Custom Message

From time to time, you may also need to send a custom e-mail message to specific members, which hasn't be created as a notification. You can do this through the *Communicate->Send Custom Message* menu. You're first asked for the username or ID number of a member, and the second page allows you to enter the contents of the e-mail message. Once you're done, simply click on the *Send Custom Message* submit button, to send the e-mail message to the needed member(s).

9.3 E-Mail All Members

You'll most likely need to send a personalized e-mail message to all members in your database, from time to time. This can be done though the *Communicate->E-Mail All Members* menu. The first page allows you to define query specifications, selecting exactly which members you would like to e-mail. Fill out any fields you would like, and only members who meet the criteria, will be e-mailed. If you would like to e-mail all members in your database, leave all fields blank, and click on the *E-Mail All Members* submit button.

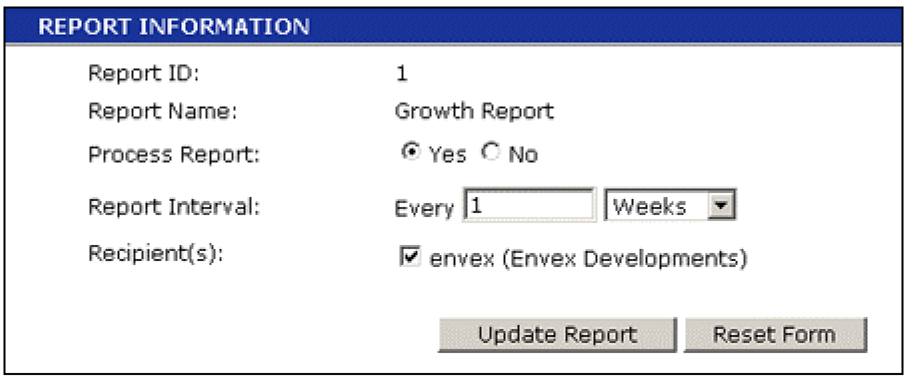
The next page allows you to define the contents of the e-mail message. Once you've entered the exact e-mail message, click on the *Preview E-Mail Message* submit button to preview your e-mail message. Once you're happy with the results, click on the *Send E-Mail Message* submit button, and the e-mail message will be automatically sent to all needed members.

10.) Report System

The report system allows you to generate many custom reports, with almost any information you would like. You can create an index of reports, which can be generated at any time. For each report, you define query and result parameters. xFlow queries the database for the needed parameters, then displays the results according to the parameters you chose. There are also several pre-determined reports you can generate through the Reports menu.

10.1 E-Mail Reports

There are two different reports you can receive via e-mail. These can be managed through the *Reports->E-Mail Reports* menu. Click on the *View Details* link of the report you would like to manage, and the next page will look something like:



The first question asks if you would like to process the report or not. In other words, if you would like the software to e-mail you the report at the needed times or not. The next question allows you to specify exactly how often you want to receive the report via e-mail. This is also the reporting period. For example, if you set the report interval for every two weeks, the software will generate the report using the past two weeks of activity.

The last question displays a list of all administrators in your database, which you created through the *Other->Manage Administrators* menu, and allows you to select exactly who will be sent the report.

10.2 Export Database

You can export your entire member database, or only a select group of members, through the *Reports->Export Database* menu. The first screen allows you to define a search criteria, selecting exactly which members from the database you would like to export. To export all members, simply submit the form, leaving it exactly as is.

The next page allows you to define a delimiter for the text file, which defaults to tab. You can also select exactly which fields from the database will be displayed in the text file. Once you've completed the information, submit the form and the software will export the database, and display it as a text file in your web browser. You can then save the text file, and import it into another program, such as Microsoft Excel.

10.3 Growth Report

The growth report, which can be generated through the *Reports->Growth Report* menu, gives you a detailed summary of your program's growth, and how many members have joined. The first section on the page gives you a quick summary of the total number of members in your database, broken down by status and member type.

The second section gives a monthly summary, explaining exactly how many members joined each other. You can change the layout of the results by using the *Sort By* select box, which allows you to specify which field to sort the table by. You may also view a summary per day, by clicking on any month in the table. This will show the same type of results, but broken down per day, instead of per month.

The last section on the page shows the members who have recruited the most members. You can modify the results shown in the table using the small form just below the table.

10.4 Genealogy Report

The genealogy report, which can be generated through the *Reports->Genealogy Report* menu provides a detailed summary of all downline positions created each month, and in which program structure, and if a recycling matrix, which phase as well. This allows you to view how your downline is developing overall. You can also view a daily summary of all downline positions created by clicking on any month link, and then view exactly which downline positions were created by clicking on the date link on the next page.

10.5 Transaction Report

The transaction report, which can be generated through the *Reports->Transaction Report* menu, provides a detailed summary of all transactions added to all member's accounts, since your business started. You can see a quick summary, giving the total of all transactions, a monthly summary, and a breakdown of each transaction in your index. You can view further details, broken down by day instead of month, by clicking on any month in the summary.

10.6 Web Site Stats Report

The web site stats report, which can be generated through the *Reports->Web Site Stats Report* menu, gives you a detailed summary of all traffic, to all member's self replicating web sites combined. Due to technicalities, this report is not generated in real-time, but instead, is automatically updated by the software every six hours.

11.) Other Features

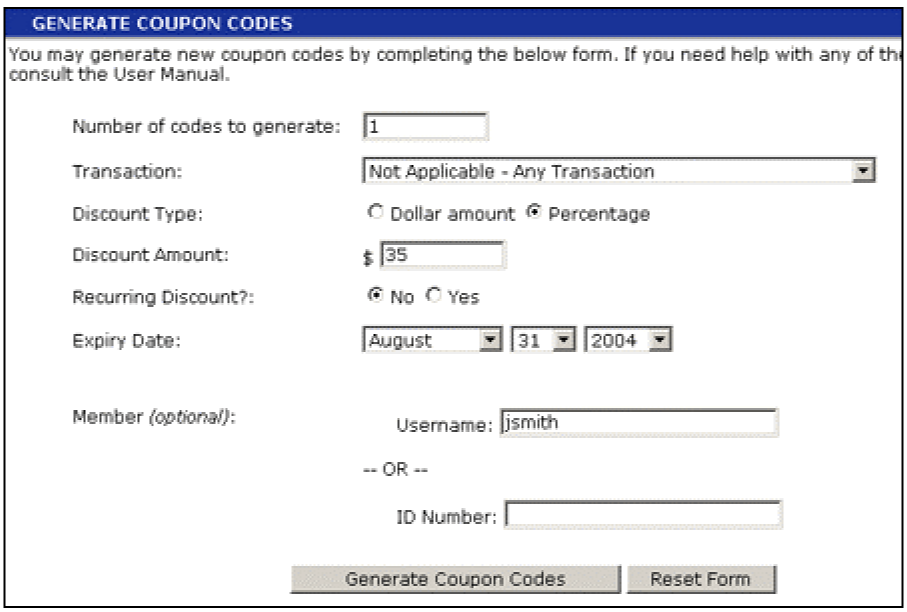
This section explains many miscellaneous features, most of which can be found in the *Other* menu of the Admin Control Panel. These features range from coupon codes, to managing administrators, to performing mass actions on your database.

11.1 Coupon Codes

Coupon codes allow you to easily give members discounts, when they process transactions through the Member's Only Area. This page contains two sections, allowing you to generate new coupon codes, and manage existing coupon codes.

11.1.1 Generate Coupon Codes

This section contains several questions, asking for information on the new coupon codes, which will be generated, and looks something like:



GENERATE COUPON CODES

You may generate new coupon codes by completing the below form. If you need help with any of th consult the User Manual.

Number of codes to generate: 1

Transaction: Not Applicable - Any Transaction

Discount Type: Dollar amount / Percentage

Discount Amount: $ 35

Recurring Discount?: No / Yes

Expiry Date: August 31 2004

Member *(optional)*: Username: jsmith

-- OR --

ID Number:

Generate Coupon Codes | Reset Form

The first question asks for the number of coupon codes you would like to generate. The section question is optional, and allows you to specify an exact transaction. This means, the coupon code(s) can only be used when processing the selected transaction. The third question asks whether to discount a dollar amount, or percentage, and the next questions asks for the exact amount of the discount.

The next question asks if the coupon code is a recurring discount or not. If Yes, every recurring payment for the transaction will be discounted as needed. Otherwise, only the first payment will be discounted, and no recurring payments will be. Next, you can specify an expiry date for the coupon code(s). On this date, the coupon code(s) will automatically expire, and be deleted from the database.

Last, if wanted, you can specify an exact member. Only the member specified will be able to use the coupon codes. Using the above example, one coupon code will be generated, which subtracts 35% from the price, can be used on any transaction, will expire on August 31st, 2003, and only the member 'jsmith' can use it.

Once you've completed the form, click on the *Generate Coupon Codes* submit button, and a success message will appear, giving you the newly generated coupon codes.

11.1.2 Existing Coupon Codes

You can delete any existing coupon codes through this section. Simply specify any needed search times in the form, and click on the *Query Coupon Codes* submit button. The next page will display a table, listing all coupon codes which matched your search criteria, where you may then delete any listed coupon codes.

11.2 Backup Database

If ever wanted, you may manually backup your database through the *Other->Backup Database* menu. This will automatically backup your member database, and create a new archive file in the */cgi-bin/xflow/backup/* directory of your server. Please note, backups are automatically performed by the script, at the needed time intervals, depending on your settings, so there's no real need to ever manually backup your database.

11.3 Import EIF File

This feature allows you to upload a text delimited file into the Admin Control Panel, and automatically have a large number of actions performed. This is perfect for things such as importing a database of members, processing a large number of transactions, and so on. For full details on how to create EIF files, and the actions you can perform within them, please consult the online documentation site at http://docs.envex.com/

11.4 Perform Mass Action

This is a powerful feature, allowing you to immediately perform an action on a mass number of members in your database, and can be performed through the *Other->Perform Mass Action* menu. You define both, query parameters, and an action to perform. All members who match the query parameters will automatically have the needed action performed against them.

The first page allows you to specify query parameters, which your member database will be searched for. Only members matching the specified parameters will have the action performed against them. Any fields left blank, will be omitted from the search.

The section page contains one select box, allowing you to specify which action to perform. The third and last page, asks for specific information regarding the action to perform. Once you're happy with everything, click on the *Perform Mass Action* submit button, and the action will be immediately performed against all members, who meet your search criteria.

11.5 Internal Messages

You can manage all internal messages, such as error and success messages the software gives off, through the *Other->Internal Messages* menu. Normally, you will never need to use this feature. This page contains one section, which allows you to query the database of internal messages, to find the specific message you're looking for.

If more than one messages match your search criteria, a table will be displayed on the next page, asking you to choose a specific message. If only one message matches your search criteria, a text box will be displayed, giving the contents of the message, which you may edit as wanted.

11.6 Other Actions

You can perform several miscellaneous actions on your database through the *Other->Other Actions* menu, such as delete all members from your database, reset member's hit trackers, etc. The only action you should not perform, unless you are instructed to by Envex Developments, is re-create all member's profiles.