

# Sprint Review Notes

## Upgrade on Renewal

- Currently for iMIS Professional
- Members presented with option to upgrade renewal
- Click **Renew Now** button > choose to upgrade before check out
- **Invoice adjustment** is automatically added to the cart if membership upgrade is chosen
- **Renewal Products** come from a product set
- Select “Add purchaser to group” on Add Product window, and purchasers are assigned a group role
- Then can set group membership billing options in **Edit Group** window

The screenshot shows the 'Edit Group' window with the following sections:

- Start Policy**
  - Set Start Date equal to the date member was added to the group
  - Set Start Date equal to first day of the month member was added to the group
- Renewal Policy**
  - Group Membership is subject to renewal billings
- Renewal selection criteria**

When processing group renewals, the following information will be used to determine who is billed for their membership and what products they are billed for.

  - Include inactive members
  - Include members expiring within
- Roles to be renewed**
  - 

	ROLE	RENEWAL PRODUCT	
<input type="button" value="Select"/>	Regular Member	Renew regular membership	<input type="button" value="Delete"/>
<input type="button" value="Select"/>	Associate Member	Renew associate membership	<input type="button" value="Delete"/>
<input type="button" value="Select"/>	Student Member	Renew student membership	<input type="button" value="Delete"/>

Buttons:

## Enter Prepayments on Staff Site

- Currently for iMIS Professional
- Enter over-payment amount at check-out
- Can also be done on cart page independent of a purchase
- Available credit displays as an alert on staff account page
- Can turn off function for staff users