

Simple Membership Plugin Setup Documentation

After you install the membership plugin, you need to create a membership level. You can create as many membership levels as you want.

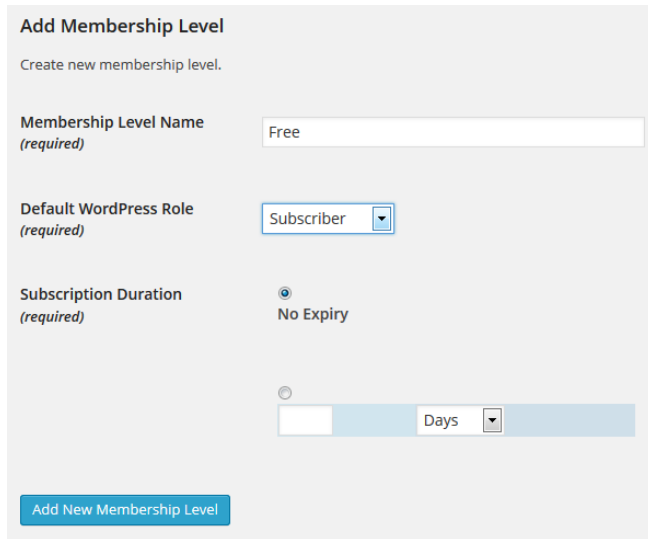
Membership levels allow you to easily control and assign what content your members CAN and CANNOT see on your site. When a visitor becomes a member, he/she is assigned to one of the membership levels you create. The member will then have access to the site's content based on the permissions you defined in the membership level.

Creating a Membership Level

Go to the "Membership Level" menu from the admin interface then click on the "Add New" button to add a new membership level:

The screenshot displays the WordPress admin dashboard for the 'Simple WP Membership' plugin. The left sidebar menu is visible, with 'WP Membership' expanded to show 'Members', 'Membership Levels', and 'Settings'. The main content area is titled 'Simple WP Membership::Membership Levels' and includes an 'Add New' button. Below the title are two tabs: 'Membership level' (selected) and 'Manage Content Production'. The 'Membership level' tab shows a table with columns 'ID' and 'Membership Level'. The table is currently empty, displaying the message 'No membership levels found, dude.' Below the table are 'Bulk Actions' and 'Apply' buttons, and an 'Add New' button.

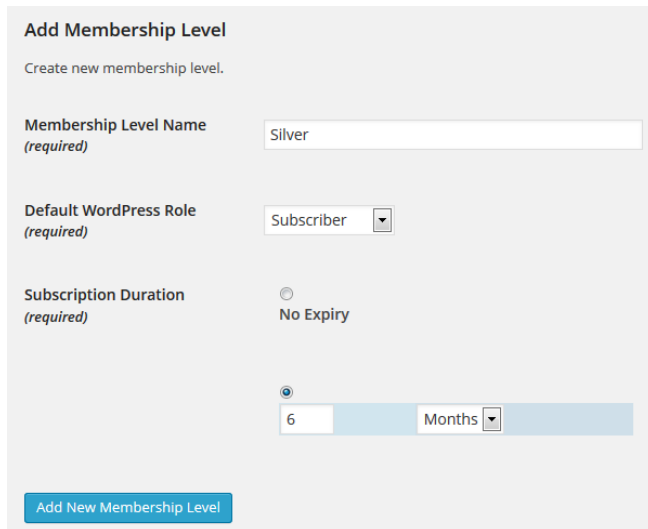
Lets add a free membership level with the following details (you can edit these details anytime)



The screenshot shows the 'Add Membership Level' form. At the top, it says 'Add Membership Level' and 'Create new membership level.' Below this are three fields: 'Membership Level Name (required)' with the value 'Free', 'Default WordPress Role (required)' with a dropdown menu set to 'Subscriber', and 'Subscription Duration (required)' with radio buttons. The 'No Expiry' option is selected. Below the radio buttons is a text input field for a duration value and a dropdown menu for the unit, currently set to 'Days'. At the bottom left is a blue button labeled 'Add New Membership Level'.

A value of "No Expiry" in the subscription duration field means that this membership doesn't expire.

Lets create another membership level which will be a premium membership (users will need to pay to access this level).



The screenshot shows the 'Add Membership Level' form. At the top, it says 'Add Membership Level' and 'Create new membership level.' Below this are three fields: 'Membership Level Name (required)' with the value 'Silver', 'Default WordPress Role (required)' with a dropdown menu set to 'Subscriber', and 'Subscription Duration (required)' with radio buttons. The '6 Months' option is selected. Below the radio buttons is a text input field with the value '6' and a dropdown menu for the unit set to 'Months'. At the bottom left is a blue button labeled 'Add New Membership Level'.

This membership level is for 6 months. Users who pay for this membership level will have access to the "Silver" membership level content for 6 months. The membership will automatically expire after that time.

Each of your membership levels will have an ID that the plugin auto generates (you can see it in the "ID" column of the membership level list interface.

In the next section of this documentation, I will show you how you can apply protection to your content using the membership levels you just created.

Applying Content Protection

Now that you have created some membership levels, you can start protecting your content for those levels.

Take the following steps to apply protection your content so only members can have access to it.

1. Edit the Post or Page that you want to protect in WordPress editor.
2. Scroll down to the section titled "Simple WP Membership Protection".
3. Select "Yes, Protect this content" option.
4. Check the membership levels that should have access to that page's content.
5. Hit the Update/Save Button to save the changes.

Simple WP Membership Protection

Do you want to protect this content?

No, Do not protect this content.

Yes, Protect this content.

Select the membership level that can access this content:

Free

Silver

Gold

Go ahead and apply some content protection to some of your posts and pages. You can protect some test pages to start with (if you just wanted to see how it works).

Settings Configuration

After your membership levels are in place, you need to go to the settings interface of this plugin to do some basic configuration.

Click on the "Setting" link from the "WP Membership" admin interface.

The screenshot shows the 'Simple WP Membership::Settings' page. The left sidebar is dark with a blue highlight on 'WP Membership'. The main content area has a title 'Simple WP Membership::Settings' and three tabs: 'General Settings', 'Payment Settings', and 'Email Settings'. The 'General Settings' tab is active. Below the title, there is a section for 'General Settings' with the text 'General Setting are added here.' and two settings: 'Enable Free Membership' (checkbox, unchecked) and 'Free Membership Level ID' (text input, value '0'). Below that is a section for 'Pages Settings' with the text 'URL related settings goes here.' and five text input fields for URLs: 'Login Page URL' (http://www.example.com/membership-login/), 'Registration Page URL' (http://www.example.com/membership-join/membership-registration/), 'Join Us Page URL' (http:www.example.com/membership-join/), 'Edit Profile Page URL' (http://www.example.com/membership-login/membership-profile/), and 'Password Reset Page URL' (http://www.example.com/membership-login/password-reset/). A 'Save Changes' button is at the bottom.

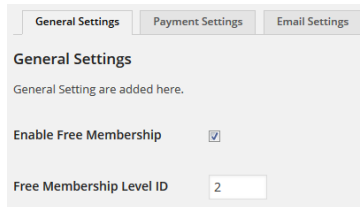
The plugin automatically creates the required pages when you install it. So just make sure that the following pages were created in your install and the URL of those pages are saved in the settings:

- Login page (this is where users will go to log into the site)
- Registration page (this where users fill in a form to register/create account)
- Join Us Page (this is where a user goes to find out all your membership options)
- Edit profile page (your members can go to this page to edit their details)
- Password reset page (used for resetting a member's password)

The plugin needs the above pages to function properly so don't delete these pages. If you have accidentally deleted these pages then use [this documentation](#) to recreate them.

For now, lets enable a free membership option on your site (you can disable it anytime if you want to).

Check the "Enable Free Membership" checkbox and fill in the free membership level ID field (in my case the free level ID is 2). You can find the level ID in the "Membership Level" menu.



The screenshot shows a settings interface with three tabs: "General Settings", "Payment Settings", and "Email Settings". The "General Settings" tab is active. Below the tabs, there is a heading "General Settings" and a sub-heading "General Setting are added here.". There are two settings visible: "Enable Free Membership" with a checked checkbox, and "Free Membership Level ID" with a text input field containing the number "2".

Payment for Membership

If you want to charge for access to some membership levels on your site then you can do that too. If you only want to offer free membership then skip this section.

You can charge an "one time" fee to give access to a membership level. You can also create a PayPal subscription button to charge recurring fee for access to a level.

The following documentation will show you how to create payment button for membership:

1. [Create a PayPal buy now button for One time fee](#)
2. [Create a PayPal subscription button for recurring fee](#)

Lets say you want to charge \$49.95 for the silver membership level. The silver level will give users access to content protected under that level. The access will expire in 6 months (from the date of payment).

Go ahead and create a PayPal buy now button with a price of \$49.95 (or any other price to test it). Then add the payment button to your membership "**Join Us**" page.

Email Settings

Next, lets take a look at the "Email Settings" tab:

General Settings | **Payment Settings** | **Email Settings**

Email Misc. Settings

Settings in this section apply to all emails.

From Email Address

Email Settings (Prompt to Complete Registration)

This email will be sent to prompt user to complete registration.

Email Subject

Email Body

Email Settings (Registration Complete)

This email will be sent to your users when they complete the registration and become a member.

Email Subject

Email Body

Send Notification To Admin

Most of the basic email configuration items should be already in place so you don't have to do anything in this tab right now. Once you get to know the plugin a little more, you can customize some of the email messages.

How the Membership Signup Process Works

Once you have finished setting up your membership site, you can expect the following:

1. Visitors land on your website and see that you have some protected content.
2. The users click on the “**Join Us**” link which takes them to the “**Membership Join Us**” Page. You have explained all the different types of memberships you offer on your site.
3. From the “**Membership Join Us**” page, the visitors can decide which membership option they want to go for (Example: Free, Silver, Gold etc).
4. If they choose the “Free Membership” option, then they just follow the link and sign up for a free membership. Remember, the free membership sign up is only possible if you have enabled this option in the settings of this plugin.
5. If they choose a “Premium Membership” then they make a payment by clicking on the payment button.
6. Once the Payment is confirmed (at this point the plugin knows which paid membership this member wants), the plugin will create a membership account entry for this visitor.
7. The user will receive an email that contains a “**unique**” link. The user will need to click on this link to activate the account.
8. When the member clicks on that link in the email it will let them choose a “username” and “password” and complete the registration process.
9. At this point the member can log into the site and enjoy the premium content.