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InstaMember USER'S GUIDE

InstaMember Quick Guide

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InstaMember Quick Guide

This guide will help you get started with the installation and the most basic setup of InstaMember to get your InstaMember site up and running.

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InstaMember Installation

Before you can install InstaMember, you must have PHP 5.2+ and WordPress 3.4+ installed in your server.

Installing InstaMember via cPanel

- Login to your cPanel, and click on the "File Manager" icon.
- Locate your WordPress installation folder, and go to "wp-content/plugins"
- Upload the InstaMember zip file to "wp-content/plugins". If you can't see the zip file after you have it uploaded, just hit "reload" on the file manager.
- Right-Click the uploaded zip file and choose "Extract" and then a pop-up/modal box will appear. Simply click the close button.
- Now, login to your WordPress Dashboard, and navigate to "Plugins". Scroll down to find "InstaMember"on the plugin list and then click "Activate".
- Once InstaMember has been activated, click on the "InstaMember" on the sidebar menu to start using InstaMember.

*Note: You may have to enter your InstaMember license key first to register your copy of InstaMember

Installing InstaMember via Wordpress Dashboard

- Go to Plugins > Add New.
- Upload the InstaMember zip file
- Click Install Now to install the InstaMember
- Click Activate Plugin to activate it
- Once InstaMember has been activated, click on the "InstaMember" on the sidebar menu to start using InstaMember.

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Step #1: Configure InstaMember For The First Time

- Click on the "Setup/Configuration" tab
- You can enter your "Business Name" and "Business Address" on the "Basic Configuration" section.
- Scroll down to find the "Membership Configuration"
- Select the currency that you're going to use to sell your products.
- The "Membership Handler Page" is the page that act as a placeholder for login, registration, reset password, edit profile forms, and also for the support desk. All necessary forms will be auto-generated by InstaMember as long as the handler page is exists.

Normally, InstaMember will auto-create the handler page upon plugin activation so you don't have to modify this setting. However, if there's no page selected for this setting, then please create a page with any title and a blank content, and select that page for the "Membership Handler Page" setting.

- Next is the "Membership Home Page" setting. This setting is mandatory, and you cannot leave this blank. Please create a new page in WordPress and select it for the "Membership Home Page" setting.

InstaMember automatically protect your membership home page from non-members so they must login first to view the page.

You can put any content in the membership home page, but do NOT put direct download links here because this page will be accessible to all members regardless of what they purchased. You may want to put a welcome message here (or video), some useful links (e.g. Edit profile, upgrade links, logout), and perhaps some instructions on how to access your product(s) and how to navigate your membership site.

- You can play around with the other settings on the "Setup/Configuration" page, including the "Affiliate Programs"

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settings. All of the settings are pretty self-explanatory. Now, you can scroll down and click on the "Update Settings" button to save any changes you just made.

Step #2: Payment Integration Setup

There are two types of payments in InstaMember. The first one is the Direct Payments (e.g. PayPal, Payza, 2Checkout, etc), this is the main type of payment in InstaMember and integrated with the InstaMember's built-in affiliate program management.

The other is 3rd Party Payments (e.g. ClickBank, JVZoo, DigiResults, WSO Pro, etc), this is the type of payment that can't be integrated with the InstaMember's built-in affiliate program because each already have its own affiliate program management. When you use one of the 3rd party payments, then InstaMember will not track the affiliate clicks nor calculate the commissions.

To start selling your product with InstaMember, you have to integrate InstaMember with at least one payment system, whether it's a direct or 3rd party payment system.

To do so, please click the "Setup/Configuration" tab first. On the top right corner, there's the sub-menu. Now click on the "Payments" sub-menu.

This is where you can integrate InstaMember with the payment system of your choice. InstaMember allows you to integrate with more than one payment systems. If you want to sell a product via PayPal and ClickBank at the same time, then you can. If you want to sell this product with JVZoo and the other with PayZa, then you can too.

Simply click on the payment system tab that you want to integrate, and read the on-screen instructions on how to integrate it with InstaMember.
Once you setup at least one payment system, then you can create a product.

Step #3: Integration Setup (optional)

If you want to automatically add your new customers to your autoresponder campaign (e.g. Aweber, GetResponse, MailChimp, etc) or you want to

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display "Captcha" code on the registration page, then you have to setup this first.

- In the "Setup/Configuration" page. Click on the "Integration" sub-menu.
- You'll find a section named "Autoresponder Integrations"
- Currently, InstaMember support Aweber, GetResponse, MailChimp, iContact, ConstantContact, ImnicaMail, and InfusionSoft. Simply follow the on-screen instruction to integrate with your favorite's autoresponder account.

You can see the "Other Integrations" section just under the autoresponder integrations section. This is the section where you can integrate InstaMember with your S3 account if you want to protect your product files in S3 from public access.

- You can also found settings to integrate InstaMember with reCaptcha if you want to require visitors to enter captcha code upon registration/purchase.

Once you're done, don't forget to click on the "Update Settings" button to save any changes you made.

Step #4: Creating a Product

- Click on the "Products" tab, and then click on the "Add Product" button.
- Enter the name of your product in the "Product Name" field.
- Enter the sales page URL for this product in the "Sales Page (URL)" field.
- Choose the payment type. For this example, simply choose the "Lifetime (one-time payment)" option.
- Set the price of the product in the "Regular Price" field.
- On the "Accepted Payments" section, you can choose the direct payment system(s) that you're going to use to sell this product. Direct payment system(s) that hasn't been integrated with InstaMember will

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not appear here. Note: The 3rd party payment options will appear after you save the product.

- Next, choose the download page (or post) for this product in the "Membership Download Page" field. The post/page must be created in WordPress so InstaMember can automatically protect it from non-members or from other members who haven't purchased this product.
- If this product has multiple-pages that needs to be protected, then you can do it later after you save the product via the "Protect Content(s)" sub-menu.
- You can set the order process of this product using the drag 'n drop bars in the "Order Steps" section. If you want your visitors to register a membership account first before payment, then you can drag and drop the "Registration" bar at the top and followed by the "Payment" bar.
- If you set the order steps to "Payment >> Registration," then an option to enable auto-registration will appear. If you turn it on, your customers will only have to pay for the product, and after they paid, InstaMember will automatically create an account for them.
- If the payment is completed and valid, new members will be auto-logged in by InstaMember so they can access the product immediately. They may access the "Edit Profile" page so they can change the password immediately). This way you can eliminate unnecessary steps and product access problems. Note: Email containing username and password will also be sent.
- The "After Purchase Redirect (URL)" is optional and you can leave this blank. However, if you want to show your new customers a custom thank you page, maybe with some specific instructions on how to access the product, and which may include some links to other offers/upgrades, then you can put the URL here.
- If you don't have the "1-Click Upsells" upgrade or you're using a 3rd party payment system with no upsets system, then you can enter your upsell/OTO sales page in the "After Purchase Redirect (URL)" field.

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- At this point, you can click the "Save Product" button below to add the product.

Setting-up a Subscription Product (recurring payments)

- In the add/edit product screen, choose "Subscription/Recurring Payment" on the "Payment Type" field.
- Set the of the subscription price on the "Subscription/Rebill Price" field. This is the price that your customers have to pay the first time they joined (initial payment), and for every billing cycle.
- If you set the "Rebill Times" to '0', then your customers will be billed forever, or until they cancelled the subscription. If only want to re-bill the customers for 6 times (after the initial payment), then set it to '6' (initial payment will not be counted).

  For example, if you set it to '6', then your customers will be billed once at the first time, and then six times after that.
- Click the "Save Product" setting to update the data.

Setting-up a Subscription Product with Trial Offer

- In the add/edit product screen, choose "Subscription/Recurring Payment" on the "Payment Type" field.
- Turn on the "Enable Trial Period" option.
- Enter the trial price into the "Trial Price" setting, and also set the trial duration. If you want to offer a free trial, then enter '0' (zero) on the "Trial Price" field.
- Now, enter the normal price that you'll going to charge your customers after the trial period has ended in the "Subscription/Recurring Payment" setting, and don't forget to set the regular billing cycle.

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- Optionally, you can also set the "Rebill Times" setting if you wish.
- Click the "Save Product" setting to update.

Setting Up Affiliate Program Commissions

- Please note that you have to use the "Direct Payments" in order to enable the built-in affiliate program.
- Enter the commission percentage for the 1-tier level. You can see there are two settings. The first is the "Regular" commission and the other is the "Exclusive" commission. You can enter different commissions for regular and super (exclusive) affiliates.
- You can also turn on the 2-tier option If you want. The settings is pretty much the same with the 1-tier commission.

Integrate Your Product With 3rd Party Payments

- First of all, make sure that you have integrate at least with one 3rd party payment in the "Setup/Configuration -> Payments" page.
- Go to "Products" tab, and edit the product that you want to integrate.
- Set the "Order Steps" to "Payment >> Registration" because you cannot use 3rd party payments if you set the order steps to registration and then payment.
- You can turn on the "Auto-Registration" option if you want.
- Scroll down to find the 3rd party payments section. Click on the [+] button to open up its settings.
- Turn on the 3rd payment(s) that you want to use to sell the product.
- Scroll the screen a bit to find the settings of each 3rd party that you've enabled. Each payment may have a different set of settings. Simply follow the on-screen instructions to properly integrate InstaMember with each payment.

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Integrate Your Product With Your Autoresponder

- In the add/edit product settings, scroll down to find the "Autoresponder Integration" and click the "+" button to open up its settings. Please note that this option won't appear if you haven't integrate with your autoresponder account in the "Setup/Configuration -> Integration" page.
- Turn on the "Autoresponder Integration" option.
- Select your "Autoresponder System" from the drop-down.
- Select the "Campaign/List Name" from the drop down. If you can't see the campaign/list names that you've created in your autoresponder account, then click on the "Reload List" button, and the edit product page will be reloaded. Open up the autoresponder setting again, and you should see your campaign/list names.

Integrate Your Product With GoToWebinar

If you want your new members or customers to be automatically signed-up to your webinar(s), then you can. Here's how:

- Simply create a webinar in your GoToWebinar account.
- On the webinar registration fields settings, make sure that you set the required fields to "First Name", "Last Name" and "Email Address". Do NOT make other fields as a required field or the integration won't work.
- Copy the webinar registration URL, and enter it on the GoToWebinar integration settings (on the add/edit product screen).
- You can integrate with up to 7 webinars per product.

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Setting-up a Free Product

- This is actually pretty simple. On the "Payment Type" setting in the product screen, simply choose "Free Membership".
- Enter the URL of your Landing Page URL, and enter the URL of your thank you page in "After Registration Redirect (URL)" field.
- Additionally, you may also integrate this product with your autoresponder and GoToWebinar.
- Click the "Save Product" button.

Step #5: Selling Your Product

If you're using the direct payment(s) to sell your product, then you have to use the payment URL or button code that is generated by InstaMember.

Go to "Products" tab, and highlight or click the name of the product that you want to sell, and click on the "Reg/Pay Button" sub-menu, and you should see order URL/button code for each direct payment that you've activated for that product.

Simply grab the link or the HTML code, and put it on your sales page. If you create your sales page in WordPress, then you can use the shortcode too.

If you sell your product via 3rd party payments (e.g. ClickBank, JVZoo, etc), then you can simply use payment URL that is generated by the 3rd payment company.

You can go to the "Sales Report" to view the sales or payment that has been made.

How to Process a Refund

Once you agree to refund a payment to a customer, then you have to do it via the payment system account that you use to sell your product.
For example, if you sell the product using PayPal, then you can login to PayPal and then refund the payment from there. It's also the same with the 3rd party payment system, if you sell the product via JVZoo, then you have to refund it via JVZoo.

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As for PayPal and ClickBank, after you've refunded the payment, then InstaMember will auto-revoke the membership access for that customer. However, if you're using other payment other than ClickBank and PayPal, then you have to do it manually.

Here's how:

- In InstaMember, go to "Members" tab and then search the customer that asked for the refund. You can search by the customer's email address, username, or full name.
- Once you have found the customer, highlight or click the username, and then click on the "Payments" sub-menu.
- You may see a list of payments that have been made by that customer. Find the matching payment that you just refunded, and click "Edit" on that payment.
- Once you're on the payment editing screen, set the "Payment Status" to "Refunded" and click on the "Update Payment" button to save the change.
- Now, that customer won't be able to access the product page(s).
- Alternatively, you can search the payment via the "Sales Report" tab. Simply use the search function on the "Sales Report" page, and once you've found it, you can click on "Details" to edit the payment status.

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If you have any questions or input on how we could improve this manual, please contact our support team at http://asksuzannatheresia.com

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