

SubscriptionMate

User Guide

April 2012

Acknowledgements

*This software is dedicated to the Almighty God -
to whom we owe our very existence !*

*"Now unto him that is able to do exceeding abundantly
above all that we ask or think, according to the power that
worketh in us, Unto him be glory forever and ever ! "*
(Ephesians 3:20)

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SubscriptionMate User Guide

Overview:

There are many Membership Plugins – ranging from \$10 (pseudo membership plugin) to high-end plugins costing \$197 or more.

SubscriptionMate Membership Plugin is designed to offer you a robust membership plugin that is easy and simple enough to use.

There are 5 levels of Memberships defined in this plugin:

- Platinum – Level 5
- Gold – Level 4
- Silver – Level 3
- Bronze – Level 2
- Basic – Level 1 (free membership level)

Each of these membership levels allows you to define private content within your Wordpress blog that only members on that level has access to.

For example, a Silver member can access all content that has been tagged with “Level 3” and below (e.g. Level 2 & Level 1) but a Silver Member cannot access content that has been tagged with Level 4 or Level 5.

Each membership level corresponds to a ClickBank item in your ClickBank account.

For example, let’s say you have created 5 recurring billing items in your ClickBank account.

- Item #32 - \$10/mth ← you can assign this item to the Bronze membership (Level 2)
- Item #33 - \$20/mth ← you can assign this item to the Silver membership (Level 3)
- Item #34 - \$30/mth ← you can assign this item to the Gold membership (Level 4)
- Item #35 - \$40/mth ← you can assign this item to the Platinum membership (Level 5)

So, if someone purchased item #33, he or she will then be automatically granted a Silver membership on your site. The Basic (Level 1) membership can either be a paid membership level or a “free” membership. If you plan to use Level 1 as “free membership” (e.g. to build your subscriber list), the details are on **Section 4** of this guide.

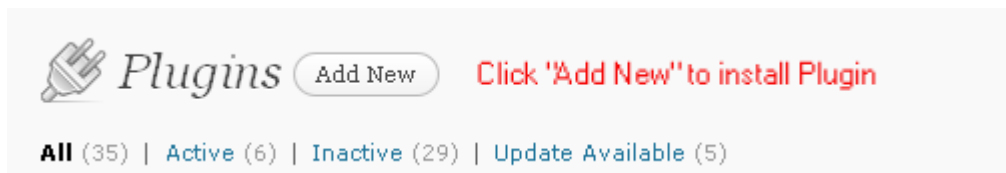
The rest of this User Guide will cover the following:

- **1. Installing the Plugin**
- **2. Setting up the “Order Link”**
- **3. Setting up the “Thank You” Page**
- **4. Setting up the Basic (Free – Level 1) Membership Page**
- **5. Creating Private (Member’s Only) Content**
- **6. Configure your ClickBank Account**

1. Installing the Plugin:

Login to your Wordpress Admin backend and click on the “Plugins” link on the left navigation panel.

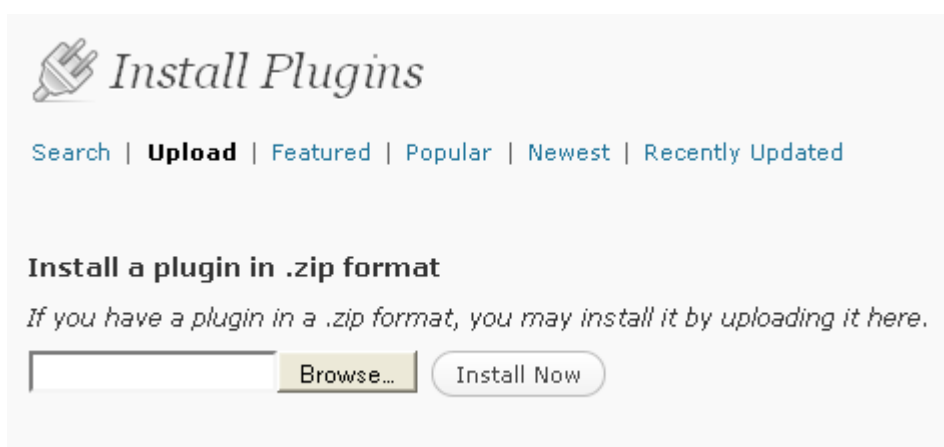
Then, on the right panel, click on the “Add New” button as shown in the screenshot below:



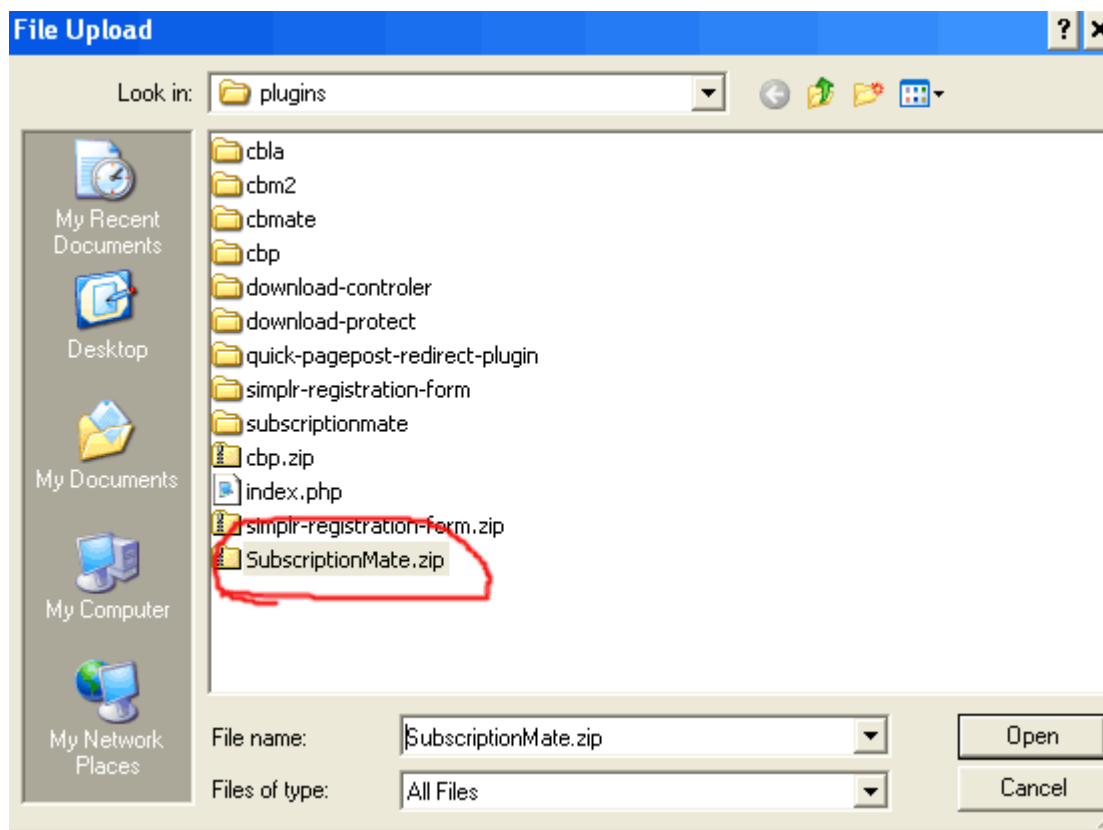
You will then see a few options – click on the “**Upload**” link as highlighted below:



You will then be prompted to upload the plugin.



Click on the “browse” button. A pop-up window will appear (see the screenshot below).



Look for the ZIP file (eg *SubscriptionMate.zip*) which you have downloaded to your computer.

Select the zip file and click on the “Open” button. (screenshot above)

Then, click on the “Install Now” button. (screen shot on the right)

You will then see the “Plugin installed successfully” screen. Click on the ‘Activate Plugin’ link to activate it. (screen shot below)

Test Blog



Install Plugins

[Search](#) | [Upload](#) | [Featured](#) | [Popular](#) | [Newest](#) | [Recent](#)

Install a plugin in .zip format

If you have a plugin in a .zip format, you may install it by up.

D:\wamp\www\wp\wp-

[Browse...](#)

[Install Now](#)

Test Blog



Installing Plugin from uploaded file: SubscriptionMate.zip

Unpacking the package...

Installing the plugin...

Plugin installed successfully.

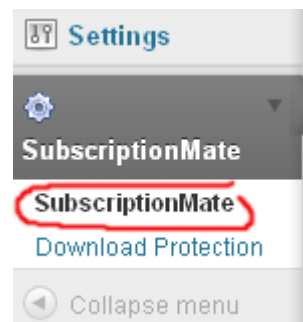
[Activate Plugin](#) | [Return to Plugins page](#)

Plugin Configuration

Once you have activated the plugin, you should be able to see it on the left navigation column.

See the screen shot on the right.

Click on the “SubscriptionMate Settings”



You will see the following screen:

SubscriptionMate Membership Settings

There are 5 levels of membership - Level 5 being the highest, Level 1 being the lowest.

A member with Level 5 access have access to all private content, ie Level 5, Level 4, Level 3, Level 2 and Level 1

A member with Level 3 access can only view content at it's own level - Level 3 and below, i.e. Level 2 and Level 1.

Each Membership Level corresponds with a ClickBank Item #ID (product #ID).

Assign Access Levels to your content/post.

When you create a private (members only) post, you just tag it with the appropriate level.

Examples:

When creating content for Level 5 access, remember to tag it with **'level5'** to the post.

Similarly, if the content is for Level 3 members, then tag the post with **'level3'**

Click [here for a screenshot](#) to see how it's done. | Click Here to [Download the User Guide](#)

Your Membership Settings:

ClickBank:

Please log into your ClickBank account and change the following:

1. IPN URL:
2. Thankyou URL:

ClickBank Vendor ID:

ClickBank Secret Key:

****NOTE:** The “IPN URL” and the “Thankyou URL” are automatically ‘pre-filled’ for you, based on the location of your wordpress blog. Example, if you installed WP in a folder called **“members”** – then, the links above would look like:

1. http://yoursite.com/members/wp-content/plugins/subscriptionmate/subm_ipn.php
2. http://yoursite.com/members/subm_thanks.php

If you plan to use Paypal, you can ignore the ClickBank settings section and enter the information for Paypal as shown in the screenshot below. *note: additional info in the “**Subscription_PaypalSetup.pdf**” file

Paypal:

Please log into your Paypal account and change the following:

1. PDT URL:

Paypal Business Email:

Paypal PDT Identity Token:

Autoresponder Type:

1 = aweber | 2 = getresponse | 4 = others | 5 = mailchimp | 8 = customAPI

Autoresponder API Key (if any):

Membership Level 5: (Platinum)

ClickBank/Paypal Item #:

Autoresponder Listname:

Welcome Page:

Membership Level 4: (Gold)

ClickBank/Paypal Item #:

Autoresponder Listname:

Welcome Page:

Membership Level 3: (Silver)

ClickBank/Paypal Item #:

Autoresponder Listname:

The fields should be quite self-explanatory.

There are 5 levels of Membership. Each membership level correspond to an item #ID in your ClickBank account. In the example screenshot above, Membership Level 3 (Silver member) corresponds to a purchase of item #33 in my ClickBank account.

The *Welcome Page* is the URL of the page that the member will see when he/she logs in.

For example, you may want to create different welcome pages for Platinum Members and Gold Members. You create these welcome pages as normal wordpress “POSTS” (not pages), and tag them accordingly.

For example, to create a Welcome Page for Platinum members, just create a wordpress Post and tag it with ‘level5’ – then, only Platinum members can see that post. See the screen shot below:

Add New Post

Screen Options Help

enter title here

SubscriptionMate Drip Content

Delay num. of days:

ad/Insert

VisualHTML

linkb-quoteinsimgulollicodemorelookup

tagsfullscreen

Set the number of days before this post is "available" to the members

Insert Tags
e.g. "level5" means this post is visible only to Level 5 (Platinum) members

Publish

Save DraftPreview

Status: DraftEdit

Visibility: PublicEdit

Publish immediatelyEdit

Move to TrashPublish

Post Tags

level5level5

Add

Enter tags with commas

Download Protection

In addition to creating private (protected) content on your blog for your members, you can also provide protected download files (e.g. special reports, etc) to your members.

These protected download links will be available to your members only. Even if someone manages to learn about these links, they won't be able to download your files (unless they know the member's username and password).

Now, click on the **"Download Protection"** link. You will see:

SubscriptionMate Download Protection

1. Upload all the files you want to protect to the 'Protected Directory'. This is a folder that you create on your server (under the root/public_html folder).

2. To insert the download links for your members, you may use the following shortcodes:

[dprotect file='filename.zip' level='X'] custom download text [/dprotect]

OR

[dprotect file='filename.zip' level='X']

where: "X" = 1,2,3,4 or 5 (corresponds with the 5 levels of membership)

and 'filename.zip' is the filename of the protected file that only your members can access.

3. Click [here for a screenshot](#) to see how it is done

Download Protection

Protected Directory:

This is a folder that you need to create under the 'root' (eg. public_html) folder on your server. Upload all the files that you want to protect to this folder.

Default Download Anchor Text:

(eg. Download Now, Click Here to Download, etc)

****NOTES:** You need to create a 'hard to guess' folder (directory) on your server to store the protected files. This folder should be in the same folder where you have installed Wordpress, e.g. if you have installed Wordpress in a folder called "members", then create this storage folder under the "members" folder.

For example, create a folder called "asdkkfgh65s9zfk" via your host's control panel or your FTP program. Then, any files that you want to protect, upload them to this folder.

- Example: Let's say you've uploaded an ebook called "specialreport.zip" to that folder. Then, to display the protected download link to your member, use this shortcode:

[dprotect file= 'specialreport.zip' level='3']

Your members won't see the above, but a special encrypted link. The **level='3'** in the shortcode above means only members in Level 3 and higher are able to download the file. Lower level members won't be able to access it.

2. Setting up the “Order Link”:

Now that you’ve configured the Plugin, let’s look at how to setup the Order Link for your membership site.

A typical ClickBank Order Link looks like this:

<http://item.vendorID.pay.clickbank.net> where “item” is the ClickBank item #ID.

Since this Membership Plugin has 5 levels (each level correspond to a unique ClickBank Item #ID), you need to append the “level” to the order link.

Examples:

To purchase the Bronze Membership (Level 2):

<http://32.vendorID.pay.clickbank.net/?level=2> (assuming item #32 corresponds to the Silver membership)

To purchase the Silver Membership (Level 3):

<http://33.vendorID.pay.clickbank.net/?level=3> (assuming item #33 corresponds to the Silver membership)

To purchase the Gold Membership (Level 4):

<http://34.vendorID.pay.clickbank.net/?level=4> (assuming item #34 corresponds to the Gold membership)

To purchase the Platinum Membership (Level 5):

<http://35.vendorID.pay.clickbank.net/?level=5> (e.g. item #35 corresponds to the Platinum membership)

***NOTE:**

For Paypal – please refer to the “[Subscription_PaypalSetup.pdf](#)” file.

There is also a sample “subscribe payment” button in the zip file – “paypal-button.html” with the sample code.

3. Setting up the “Thank You Page”:

After a customer has made a purchase, ClickBank will send the customer to a “thank you” URL that you specify in your ClickBank account.

This “Thank You” URL (or page) must point to the Plugin in order for it to automatically the Member’s account for the customer. You have 2 options for the “Thank You Page”.

Option #1: Plugin File

There is a file called “subm_thanks.php” within the zip file that you have downloaded. You need to extract this file, and upload it via your FTP program to your wordpress root folder (i.e. **in the same folder where the Wordpress “wp-config.php” file is located**).

Once you have done this, the Plugin (on its settings page) will show you the actual URL that you can copy and paste into your ClickBank account (see Section 5 on setting up Clickbank later in this guide)

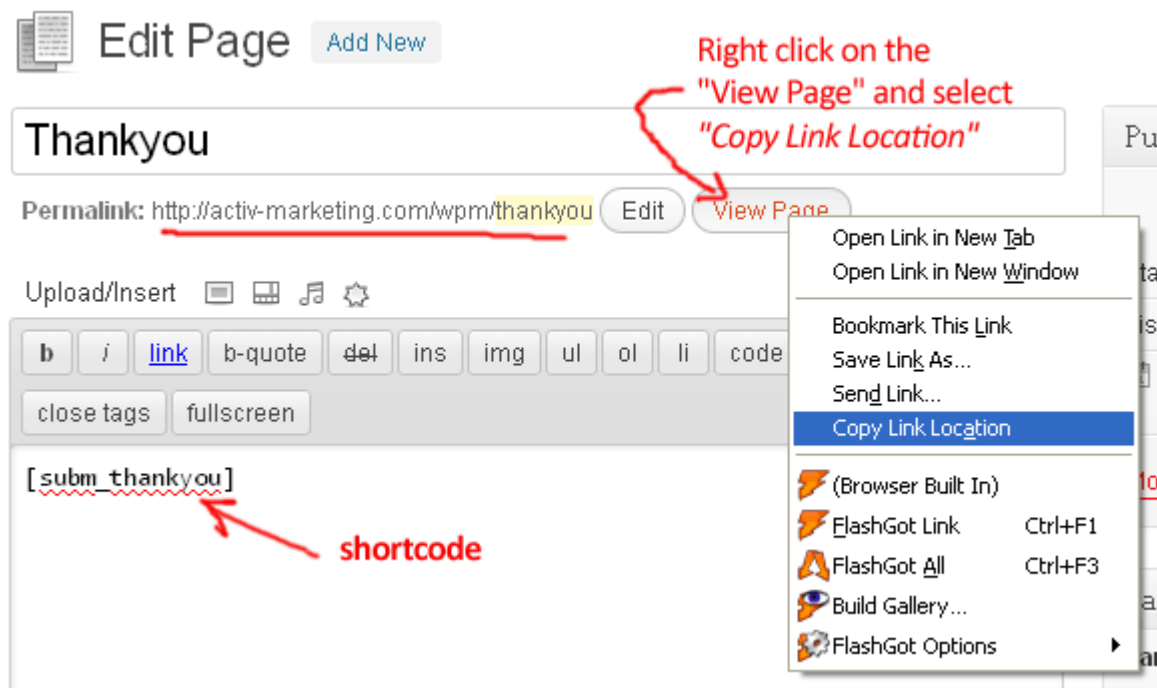
Use this same URL for ALL the Paid membership levels (ClickBank items).

Option #2: Wordpress Shortcode

Use this option if you want to create different/custom Thank You Pages (for each of the membership levels).

Create a normal Wordpress Page and insert this shortcode → **[subm_thankyou]**

See the screenshot below. Notice that the content of that page is just [subm_thankyou]. Of course, you can add more text if you want.



NOTES: Look at the **Permalink**. This is the “thank you” URL that you copy and paste into your ClickBank account. This URL will vary depending on your Wordpress setup and your permalinks. To be safe, you can

just right-click on the “View Page” button, and select the “Copy Link Location” (see the screenshot above). You can then paste the URL into your ClickBank account.

This is how it will look like to your customer (new member):

Thank you for your purchase

Please note that your credit card will show a charge by CLKBANK*COM

Here are your membership login details. Please copy the following membership info and keep it in a safe place:

Your login ID: **adrian@easybiztools.com**

Your Password: **FR7XEP5B**

Please click here to **login to the members area.**

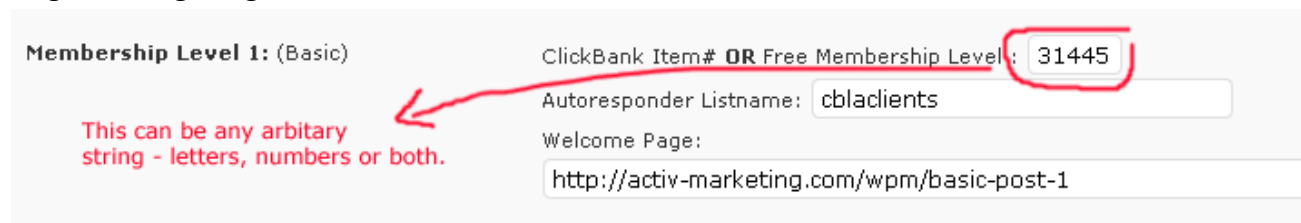
** The shortcode: `[subm_thankyou]` will display the above text to the customer (your new member)

4.Setting up Basic (Free – Level 1) Membership Page:

The Level 1 membership can be a paid membership (if it corresponds to a ClickBank item) OR a free membership level.

If you plan to setup a Free (Basic, Level 1) membership to build your subscriber list, here are the steps:

1. Plugin Settings Page:



Membership Level 1: (Basic)

ClickBank Item# OR Free Membership Level: 31445

Autoresponder Listname: cbladclients

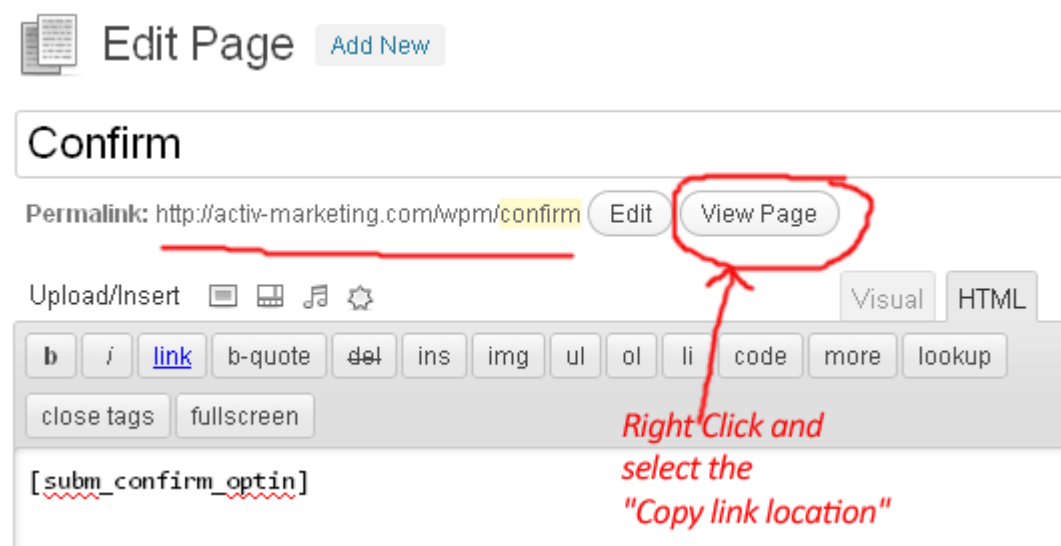
Welcome Page: http://activ-marketing.com/wpm/basic-post-1

This can be any arbitrary string - letters, numbers or both.

Max items in ClickBank is 500. You can enter any arbitrary number (> 500) or an arbitrary string if you want to set Membership Level 1 to a Free membership.

Remember to set the Autoresponder Listname and also the Autoresponder Type.

2. Create an Optin Confirmation Page. See the screenshot below:



Edit Page Add New

Confirm

Permalink: http://activ-marketing.com/wpm/confirm Edit View Page

Upload/Insert Visual HTML

close tags fullscreen

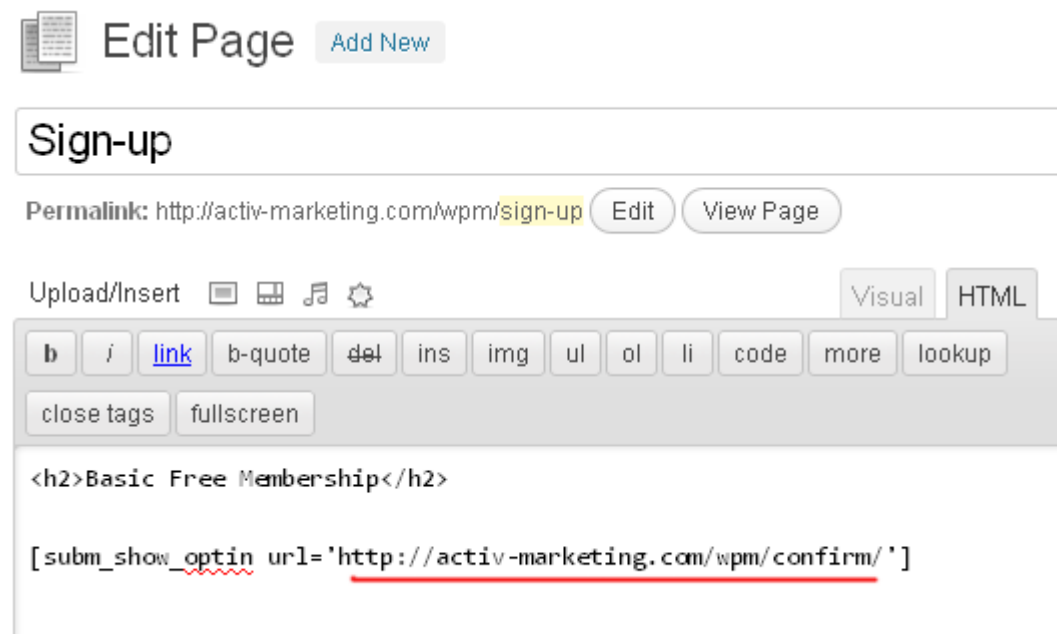
[subm_confirm_optin]

Right Click and select the "Copy link location"

Note the shortcode used: **[subm_confirm_optin]**

Then, copy the permalink (right click on the "View Page" button and select "Copy Link Location") because you need this URL to create the Optin/Sign-up Page (Step 3 below)

3. Create the Optin/Sign-up Page



Note: The shortcode used is:

`[subm_show_optin url='http://active-marketing.com/wpm/confirm/']`

(* The **url** here is the URL which you had copied in step 2 above)

Here's how it looks like on your Wordpress Page:

Sign-up

By actadm

Basic Free Membership

First name:

Last name:

Email:

Preferred Password:

5. Creating Private (Member's Only) Content:

Ok, let's recap. We've look at installing and configuring the Plugin. Then, we look at how to setup the "Order Link" and finally, how to setup the "Thankyou Page (URL)" for each of the membership levels (which corresponds to a ClickBank item)

Now, let's look at how to create Private Content for your members.

It is really simple. Just create your posts as usual – but TAG them with "**levelX**" (where X = 1,2,3,4, or 5)

Any posts that is tagged with LevelX will be automatically become "Private Content" (i.e. hidden from public) Only logged in members (with the appropriate membership levels) can view them.

For example, if you create a new post, and you TAG it with **level3** ← you are basically creating content for the Silver members (Level 3 members).

This means, only members at level 3 or higher (level 4 and level 5) can access the content, but members in the lower levels (Basic – level 1 and Bronze – level2) can't access it.

Another example: if you create a post and tag it with **level2** (bronze) - a Silver Member (level3) can view posts for Bronze (level2) and Basic (level1) but CANNOT view posts that are tagged with level4 (Gold) or level5 (Platinum)

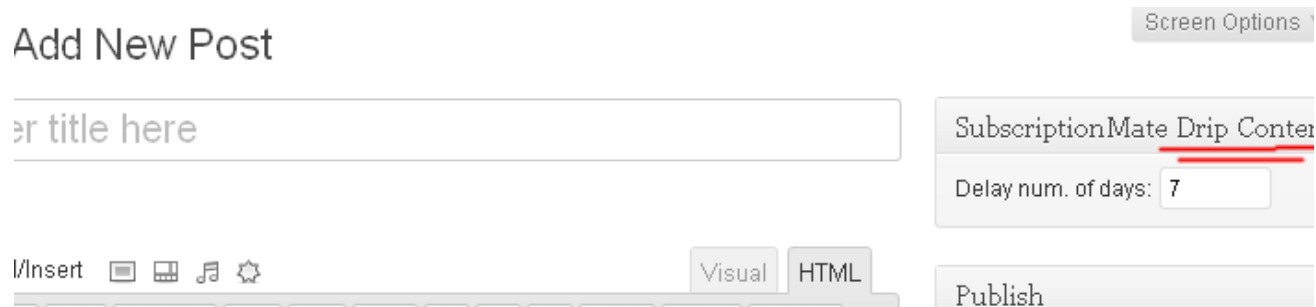
The screenshot shows the WordPress 'Add New Post' interface. The title field contains 'SubscriptionMate Drip Content'. A red annotation points to the 'Delay num. of days' field, stating: 'Set the number of days before this post is "available" to the members'. The 'Publish' sidebar shows the status as 'Draft', visibility as 'Public', and a 'Publish immediately' option. A red annotation points to the 'Post Tags' field, stating: 'Insert Tags e.g. "level5" means this post is visible only to Level 5 (Platinum) members'. The 'Post Tags' field contains 'level5' and 'level15', with a red circle around 'level15' and a note 'Add tags with commas'.

You can also create all the members content in advance and let the plugin “Drips” them on schedule.

Creating Delayed (Drip) Content

This is a killer feature and huge time saver.

Let’s say your membership site provides fresh content to your members once a week. You want to create 2 months content in advance (in 1 sitting). You can easily do this using the “Drip Content” feature.

The screenshot shows the 'Add New Post' interface. At the top right is a 'Screen Options' button. Below it is a text input field for the post title, containing the placeholder 'er title here'. To the right of the title field is a box titled 'SubscriptionMate Drip Content'. Inside this box is a label 'Delay num. of days:' followed by a text input field containing the number '7'. Below the title field is a rich text editor toolbar with icons for 'Insert', image, link, list, and undo. To the right of the toolbar are 'Visual' and 'HTML' tabs. At the bottom right is a 'Publish' button.

On the “Add New Post” page, you will see the “Drip Content” box on the upper right corner (see the screenshot above).

If you want that post’s content to appear 7 days after a new member has signed-up, just enter “7” in the box.

In other words, that post (content) will only be visible to the members 7 days AFTER he/she has joined your site.

For example, if Fred joins on the 1st, he will be able to see the content on the 8th

If Sally joins on the 3rd, she will be able to see the content only on the 10th

Same content, but different members will only see them on different days (based on their joining date)

** This is different from the Wordpress scheduled post where ALL members will see the content on a pre-determined date, regardless of when they join your site.*

5. Configure your ClickBank Account:

You need to change 3 settings in your ClickBank Account:

- i. The Thankyou page URL
- ii. The Secret Key
- iii. The IPN URL

i. The Thankyou URL

Please refer back to Page 6 and 7 in this guide. If you are using Option #1, then basically the thank you URL is the same for all the membership levels, and the Plugin's Settings Page will give you the actual URL.

See the screenshot below (your URLs will be different depending on your wordpress setup)

Your ClickBank Settings:

Please log into your ClickBank account and change the following:

1. IPN URL:
 2. Thankyou URL:
-

The URLs above is unique to my Wordpress Setup. Yours will be different - so, just copy and paste the URL from the plugin and paste it into your ClickBank account.

For example, if your membership levels (level 1 – level 5) corresponds to item #11 – item #15, then the thankyou URLs for item #11 – item #15 should be set to:

http://activ-marketing.com/subm_thanks.php ← **shown by the plugin. Yours will be different!**

If you plan to use the Wordpress Shortcode [subm_thanks] (see page 9 for details), then you would paste the URL that you have copied from the wordpress page into the ClickBank thankyou fields.

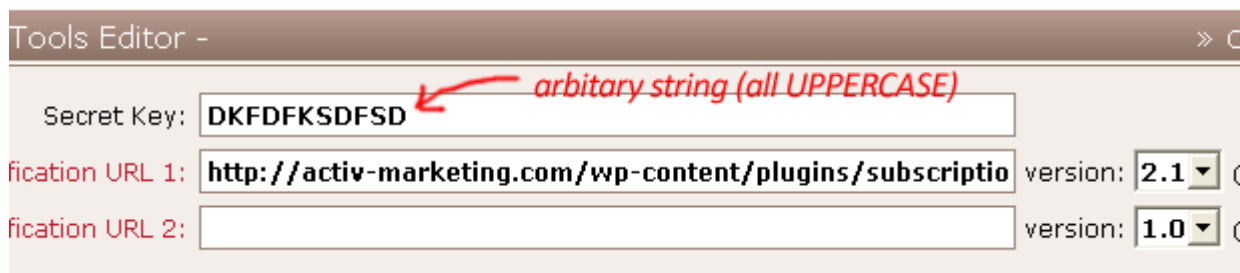
ii. The Secret Key

This is an arbitrary string (alpha-numeric characters) – max 16 characters, all in UPPERCASE. To set your Secret Key, login to your Clickbank account, click on the “Account Settings” → “My Site” and scroll down to the “Advance Tools” section.

Then, click on the “Edit” link on the upper right corner. See the screenshot below.



Now, you should be able to enter the Secret Key:



Tools Editor -

Secret Key: *arbitrary string (all UPPERCASE)*

ification URL 1: version:

ification URL 2: version:

Simply enter an arbitrary string (letters and numbers) – all in UPPERCASE, maximum 16 characters.

This will be your “Secret key”.

**** IMPORTANT.** The Secret Key that you enter here MUST match the secret key you enter in the Plugin settings page.

Your Membership Settings:

ClickBank Vendor ID:

alkhtcsh

ClickBank Secret Key:

DKFDFKSDFS

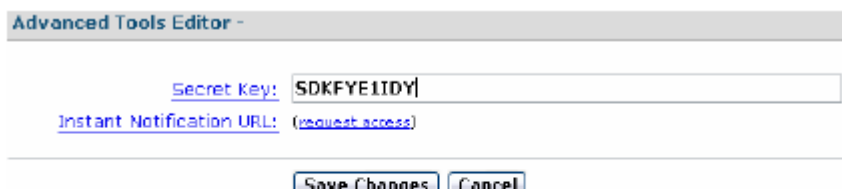
iii. The IPN URL

The purpose of the IPN URL is enable the Plugin to automatically revoke the Member’s access if they decide to cancel their membership.

If a member refunds or cancels, ClickBank will then pos that data to the URL you specify in the IPN field here. The plugin will then revoke the member’s access to your membership site.

ClickBank allows you up to a maximum of 2 IPN urls.

If this is your **first time** using the IPN url, you need to click on the “request access” link – see the screen shot below (click on the “[request access](#)” link)



Advanced Tools Editor -

Secret Key:

Instant Notification URL:

Instant Notification: Click on the “request access” link.

You will then see a bunch of Questions – just select “YES” to all of them **AND** click on the “I agree” box at the bottom – see the screenshot below.

Have you reviewed the Instant Notification release notes? * YES

Do you have programming experience or access to a programmer? * YES

Do you understand what a HTML FORM POST to a URL is? * YES

Do you understand what URL Parameters are? * YES

Do you understand what a Secret Key is? * YES

Do you understand the effects of Response Code Monitoring? * YES

Do you understand the advantage of using SSL? * YES

Before submitting your request for approval, please make sure you review and agree to the terms of use below.

(check-box located at the bottom of the Terms of Use)

RELIABLE, ACCURATE, COMPLETE, TIMELY, OR OTHERWISE VALID. CLICKBANK DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED AS THEY RELATE TO THIS INSTANT NOTIFICATION.

☒ I understand and agree to the Terms of Use. *

Yes (with arrow pointing to the YES dropdowns)

Check this box! (with arrow pointing to the checkbox)

That will give you the IPN access. Now, copy and paste the IPN URL from the Plugin’s dashboard into the IPN field in your Clickbank account.

(note: If you have used/entered an IPN url, you won’t see the above, but you can immediately add another IPN URL. ClickBank provides a maximum of 2 IPN urls only)

Copy the IPN URL from the Plugin Setting’s Page (see the screenshot below):

Your ClickBank Settings:

Please log into your ClickBank account and change the following:

1. IPN URL:

2. Thankyou URL:

(e.g. http://activ-marketing.com/wp-content/plugins/subscriptionmate/subm_ipn.php) and paste it into your ClickBank account:

Tools Editor -

Secret Key: **arbitrary string (all UPPERCASE)**

Notification URL 1: version:

Notification URL 2: version:

6. Test Purchase

Now you are all set to do a test purchase to test your membership site setup.

Login to your Clickbank account and create a test CC number.

Then, make a test purchase using one of the order links that you have created (page 6)

Examples:

<http://32.vendorID.pay.clickbank.net/?level=2> (assuming item #32 corresponds to the Silver membership)

To purchase the Silver Membership (Level 3):

<http://33.vendorID.pay.clickbank.net/?level=3> (assuming item #33 corresponds to the Silver membership)

To purchase the Gold Membership (Level 4):

<http://34.vendorID.pay.clickbank.net/?level=4> (assuming item #34 corresponds to the Gold membership)

To purchase the Platinum Membership (Level 5):

<http://35.vendorID.pay.clickbank.net/?level=5> (e.g. item #35 corresponds to the Platinum membership)

***note: for Paypal – please refer to the “[Subscription_PaypalSetup.pdf](#)”**

Congratulations! Your membership site has been setup.

If you have questions or need help, please go to:

<http://easybiztools.com/helpdesk/>

Best wishes,

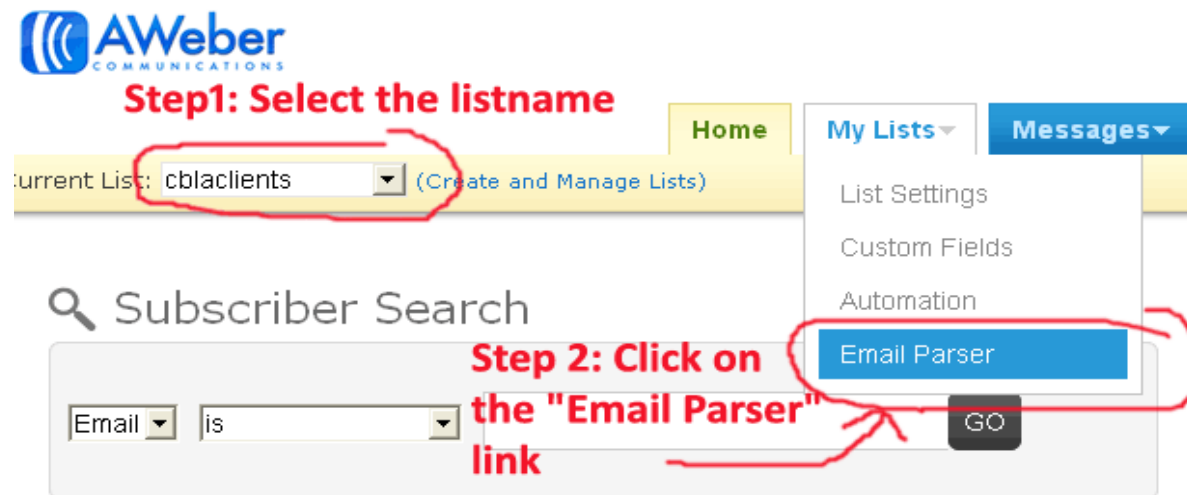
Jimmy D. Brown & Adrian Ling

Appendix: Autoresponder (Aweber) Setup:

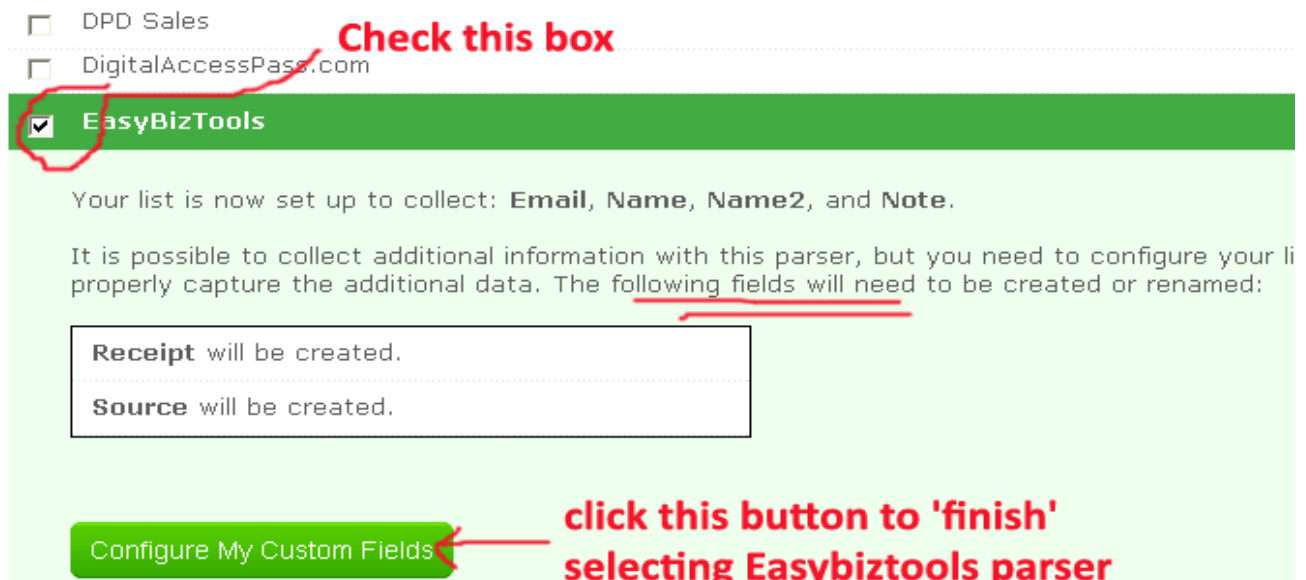
Aweber: If you are using Aweber, please enter Autoresponder Type as “1”.

Then, you MUST login to your Aweber account and enable the “EasyBiztools” email parser. This is to enable the automated subscription of your members when they sign-up.

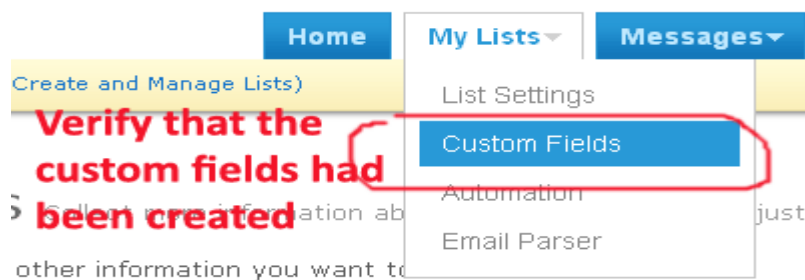
Follow the quick steps below:



You will then see a list of Email Parsers. Scroll down a bit and you will see the “Easybiztools” parser. Check the box. It should turn “green” like the screenshot below.



Finally, click on the “Custom Fields” link to verify that Aweber had created these 2 custom fields



You should see the following:

Custom Fields

Collect more information about your subscribers than just

Use this page to define what other information you want to collect.

Then, when you create a [web form](#) you can ask subscribers for that information.

The Custom Fields had been created for you by Aweber

Custom Field Name	Subscriber Update	Add / Delete
Receipt	<input type="checkbox"/>	<input type="button" value="X"/>
Source	<input type="checkbox"/>	<input type="button" value="X"/>
<input type="text"/>	<input type="checkbox"/>	<input type="button" value="+"/>
Examples: Address, Phone Number		

Save