

# InstaMember USER'S GUIDE

**Setting Up InstaMember:  
Setup / Configuration**

## **Setting Up InstaMember: Setup/Configuration**

This guide will help you learn how to configure the settings of your InstaMember powered site which includes the general settings. This contains detailed information on the options and settings to get your site up and running. Other setup and configuration guide are written on a separate manual.

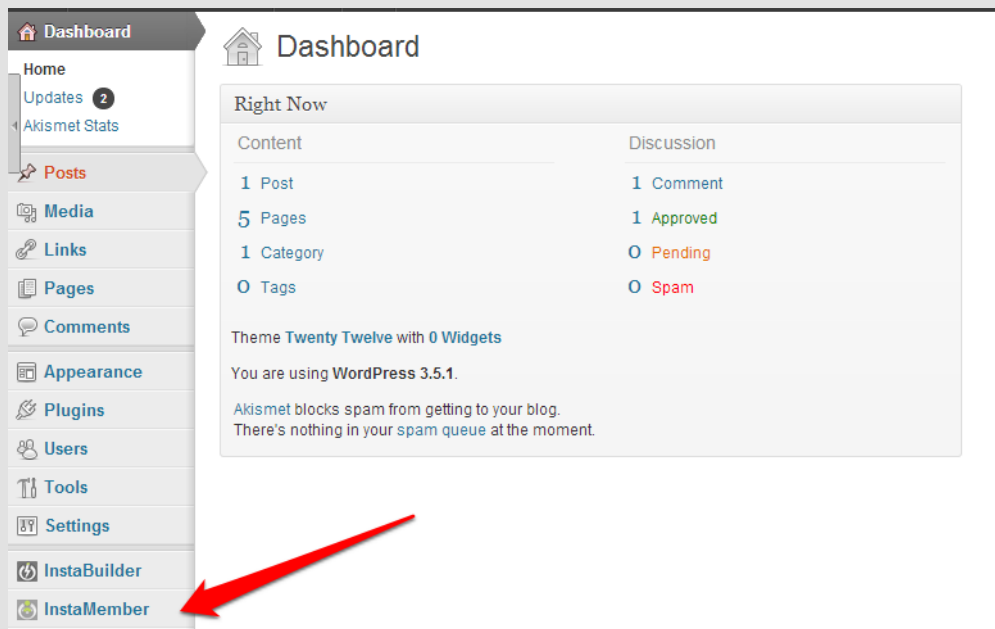
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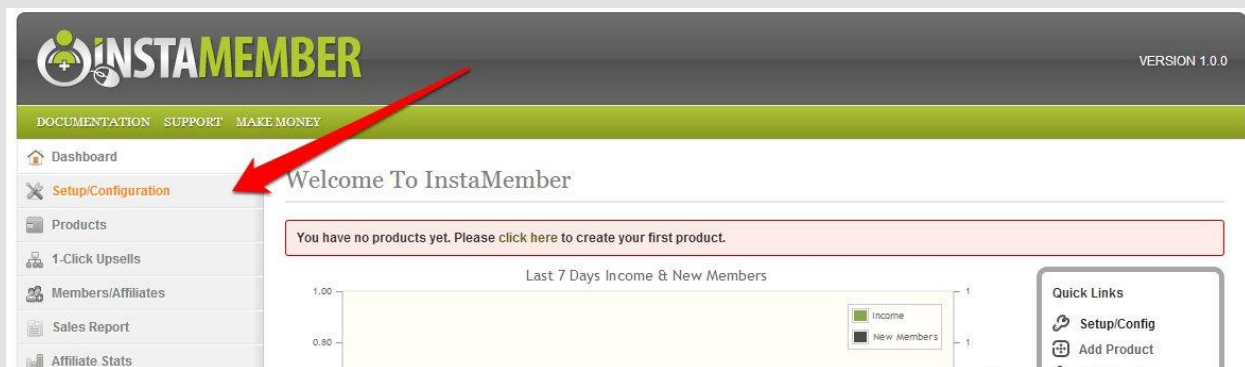
## Setting Up InstaMember: Setup/Configuration

*This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site.*


1. Navigate to your Instamember Dashboard by clicking the **Instamember** menu option on your wordpress dashboard.



2. Click '**Setup/Configuration**' to start setting up your InstaMember powered site.



3. Once clicked, you should see the setup/configuration page similar to this image


VERSION 1.0.0

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### Basic Configuration

Business Name

Please enter your business name.

Business Address

Please enter your business address.

### Membership Configuration

Currency

USD

Membership Handler Page

Member Handler

#### 4. Fill in the required fields with the appropriate data.

- **Business Name** – the name of your business should go here
- **Business Address** - this is where your business address should go

### Membership Configuration

Currency

USD

Membership Handler Page

InstaMember Handler Page

Please choose a blank page that will be used as placeholder for login, registration, reset password and edit profile forms (this plugin will auto-generate all the forms). Note: InstaMember has created a blank page during activation. However, you can change the page if you wish.

Membership Home Page

My First Product Download

Please choose a post/page as your membership home page. By default, members will be redirected to this page after logged in.

After Logout URL

Where do you want to redirect the visitors after they've logged out from the members area (must use http://)

Non-Member Redirect URL

By default, InstaMember will redirect visitors who are trying to view a protected post/page to a login page if they aren't logged in. However, if you want to take them to a custom page, then you can enter the URL here (must use http://). Otherwise, you leave this blank.

Admin Unlock Mode

OFF

Unlock Protected Content(s) when Logging In as WordPress Admin

If you turn on this option, then WordPress administrator(s) can view/access all protected posts, pages, and files without having to logging in as a member.

Sync. Members with WP

OFF

- **Currency** – the type of currency you will be using to sell and accept payments
- **Membership Handler Page** – this dropdown contains a list of published pages from your site from which you can choose from. This will be used by InstaMember to handle the registration, login, profile edit and customer support page.
- **Membership Home Page** – the dropdown contains published pages from your site from which you can choose from as the homepage for members after logging in, registering or confirming their registration. This page is only accessible by registered members. You can put in here different contents that can be customized depending on the membership level.
- **After Logout URL** – this field should be filled out with the url where members are redirected to upon logging out of the site.
- **Nonmember Redirect URL** – by default, InstaMember will redirect visitors who are trying to view a protected post/page to a login page if they aren't logged in. However, if you want to take them to a custom page, then you can enter the URL here (must use http://). Otherwise, you leave this blank.
- **Admin Unlock Mode** - by default this switch is turned off. However, if you would like to turn this feature on, then the wordpress administrators of your site will be granted the ability to view/access all protected posts, pages and files without having to log in as a member of any specific membership level.
- **Sync. Members with WP** - by default this switch is turned off. However, if you would like to turn this feature on, then InstaMember will automatically register your new members, including affiliates, as WordPress users. Any member data updates applied to InstaMember will also be applied to the WordPress database and vice versa.

## Affiliate Program Configuration

**Accepted Payout** ☒ **ON** Payout with PayPal  
☐ **OFF** Payout with Payza

**Affiliate Cookie Lifetime**  days

**Default Commission**  %

**Minimum Payout**  USD  
Set to '0' (zero) if there's no minimum payout. Payout data won't be generated for affiliates that has commission below the minimum payout.

**Commissions After Fees** ☐ **OFF**  
If you turn on this option, then affiliate commissions will be calculated after transaction fees are applied.  
**Important:** This setting will be applied ONLY when you use PayPal or PayZa to handle the payments.

**Affiliate Signup Options**

☒ **ON** Allow visitors to sign up as affiliates only (without purchasing first)

☒ **ON** Existing members have to click a link first to activate their affiliate account

☐ **OFF** Manually approve new affiliates

**Autoresponder Integration** ☐ **OFF**

- **Accepted Payout** – currently there are 2 options for processing payouts: Paypal and Payza. Make sure to setup the payment option page for whatever payout option you want to be implemented in your affiliate program.
- **Affiliate Cookie Lifetime** – this determines the period of which the saved affiliate cookie will expire.
- **Default Commission** – this will be the default commission value on products that you have allowed affiliate program.
- **Minimum Payout** – this is the minimum amount that an affiliate should achieve to receive payout. Unless it is set to zero, affiliates will not receive any payouts for as long as the value set is not met.
- **Commissions After Fees** – *this option is only applicable for payments handled by PayZa and Paypal.* This option enables commission calculation every after transaction fees are applied.
- **Affiliate Signup Options**
  - **Allow visitors to sign up as affiliates only (without purchasing first)** – turn this on if you want that visitors can sign up as an affiliate to any of your products that offer affiliate program even without purchasing.
  - **Existing members have to click a link first to activate their affiliate account** – turn this on if you would like existing members to have to click on a link

(activation/confirmation link) before becoming registered affiliates to a specific product's affiliate program.

- **Manually approve new affiliates** – turn this option on if you want to manually choose which affiliate registrations you want approved.
- **Autoresponder Integration** – by default this is turned off. Turn this on if you would like to integrate an autoresponder for registrations. **Note:** *Make sure that you have already setup the autoresponder options from the **Integration** page. Otherwise, the dropdown will show no option of any available autoresponder at all.*

A screenshot of the 'Licensing Server Configuration' page. The title 'Licensing Server Configuration' is at the top left, and a minus sign icon is at the top right. The page contains two main input fields. The first is labeled 'Licensing Server Secret' and has a text input field. Below it, a note says: 'Enter any value (alphanumeric only and no spaces please). You'll need this to validate your customers license key (please read the manual for more info).'. The second is labeled 'Licensing Server URL' and has a text input field. Below it, a note says: 'This is the API Server URL of your licensing server. You'll need this to validate your customers license key (please read the manual for more info).'. There is a small minus sign icon in the top right corner of the form area.

- **Licensing Server Secret** – please refer to the manual to fill in this field.
- **Licensing Server URL** - please refer to the manual to fill in this field.



## Advanced Configuration

**Account Sharing Prevention** If an account accessed from more than  IP Addresses within  minute(s), then InstaMember will do the following:

☒ **ON** Lock/Disable Member Account

☐ **OFF** Notify Admin via Email

**Brute-Force Login Limit**

How many incorrect login attempts allowed before delay. When limit is reached, member will be asked to wait "X" minutes before next login attempt ("X" can be set below).

**Brute-Force Login Delay**  minute(s)

How long a member (after entered incorrect login "X" times) must wait before next login attempt.

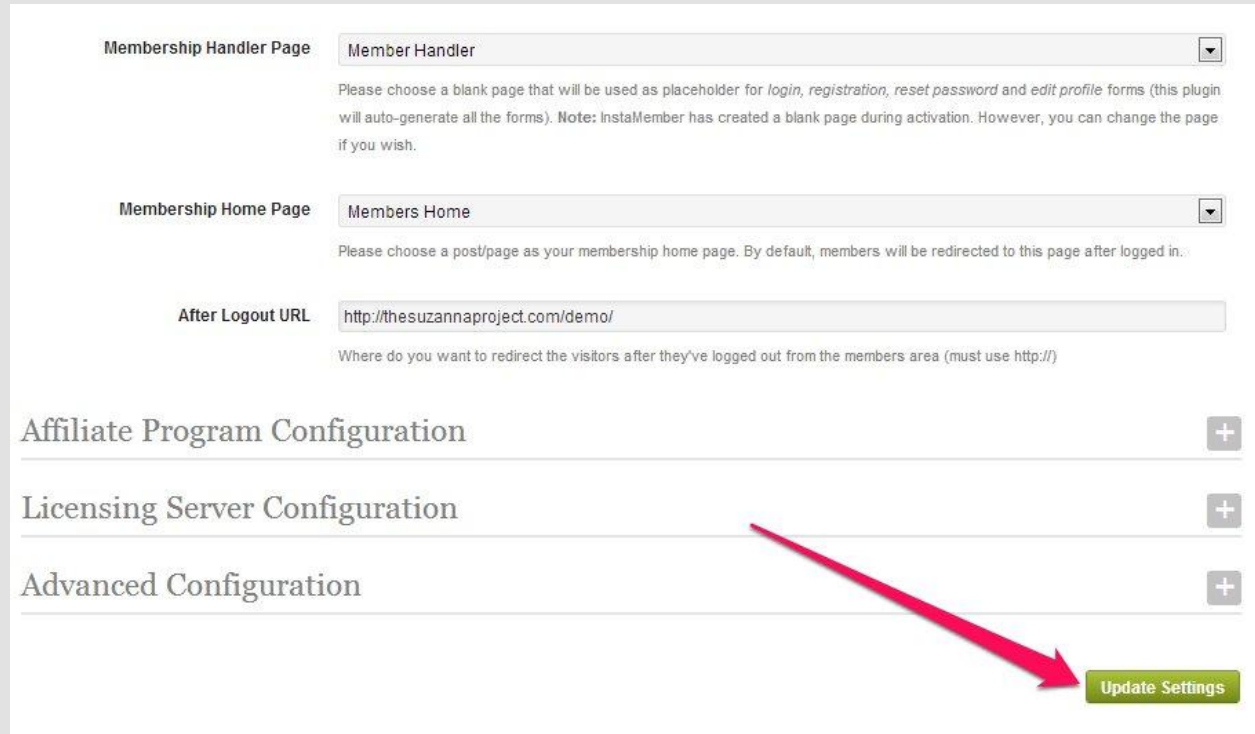
**Brute-Force Login reCaptcha** ☐ **OFF**

When this option is turned "On", InstaMember will also show reCaptcha on the login form after 2 unsuccessful login attempts. In order to use this feature, you have to integrate InstaMember with reCaptcha first on InstaMember -> Configuration

- **Account Sharing Prevention** – this option is an Instamember feature that tracks down the number of IP allowed to access a specific account within a set number of minutes. Set it up according to the preference of how many IPs will be allowed within a specific period. If for instance the values set are met, you have the option to **lock/disable the account** (turned on by default) or **notify the administrator(s) via email** about the activity (turned off by default).
- **Brute-Force Login Limit** – set this option to a value that corresponds to the number of incorrect attempts of the user to login. Upon reaching the set value, the user will have to wait for a delay period to try logging in again.
- **Brute-Force Login Delay** – this value in minutes is the time delay after a user had exceeded the number of unsuccessful login attempts.
- **Brute-Force Login reCaptcha** – this option enables reCaptcha (a captcha program) after 2 unsuccessful login attempts. Note: *this option would only apply if you have setup reCaptcha in the Integration page.*

## Save/Update Settings

Make sure that once you are done setting up, don't leave the page unless you have saved or updated the changes you made.



The screenshot displays the InstaMember settings interface. It includes three main configuration sections:

- Membership Handler Page:** A dropdown menu is set to "Member Handler". Below it, a note states: "Please choose a blank page that will be used as placeholder for login, registration, reset password and edit profile forms (this plugin will auto-generate all the forms). Note: InstaMember has created a blank page during activation. However, you can change the page if you wish."
- Membership Home Page:** A dropdown menu is set to "Members Home". Below it, a note states: "Please choose a post/page as your membership home page. By default, members will be redirected to this page after logged in."
- After Logout URL:** A text input field contains "http://thesuzannaproject.com/demo/". Below it, a note states: "Where do you want to redirect the visitors after they've logged out from the members area (must use http://)"

Below these sections are three expandable categories, each with a plus icon in a grey box:

- Affiliate Program Configuration
- Licensing Server Configuration
- Advanced Configuration

A large red arrow points from the "Licensing Server Configuration" section towards a green button labeled "Update Settings" located at the bottom right of the settings area.

## **BROUGHT TO YOU BY: SUZANNA THERESIA**

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