



InstaMember USER'S GUIDE

How to Add & Edit a Product

How to Add & Edit a Product

This guide will help you learn how to add, edit and manage different products on your InstaMember powered site. This includes detailed information that would help you know more the settings and the options.

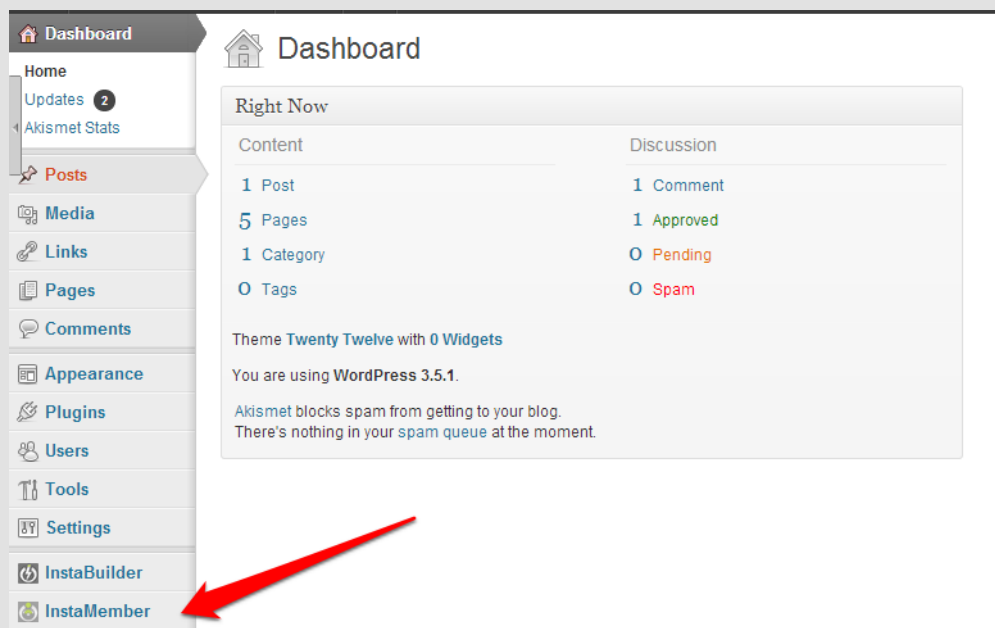
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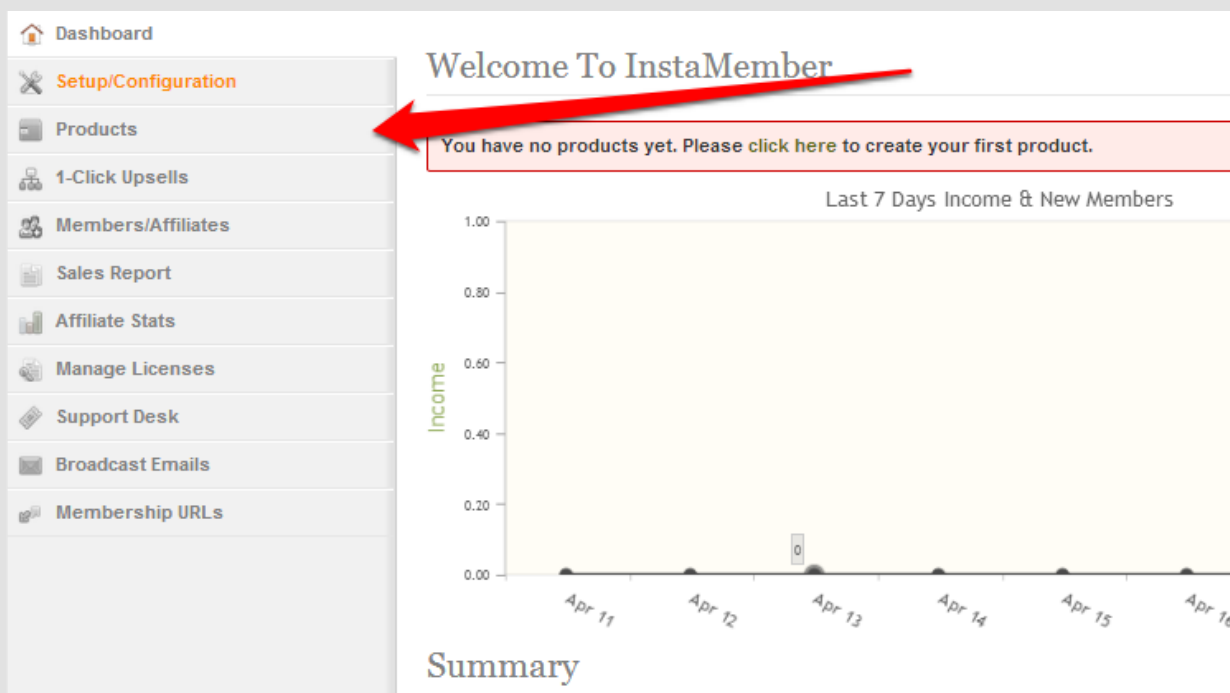
How to Add a Product

This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site. Furthermore, you have done setting up the necessary configurations of your membership site via the Setup/Configuration option, specifically Payments.

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



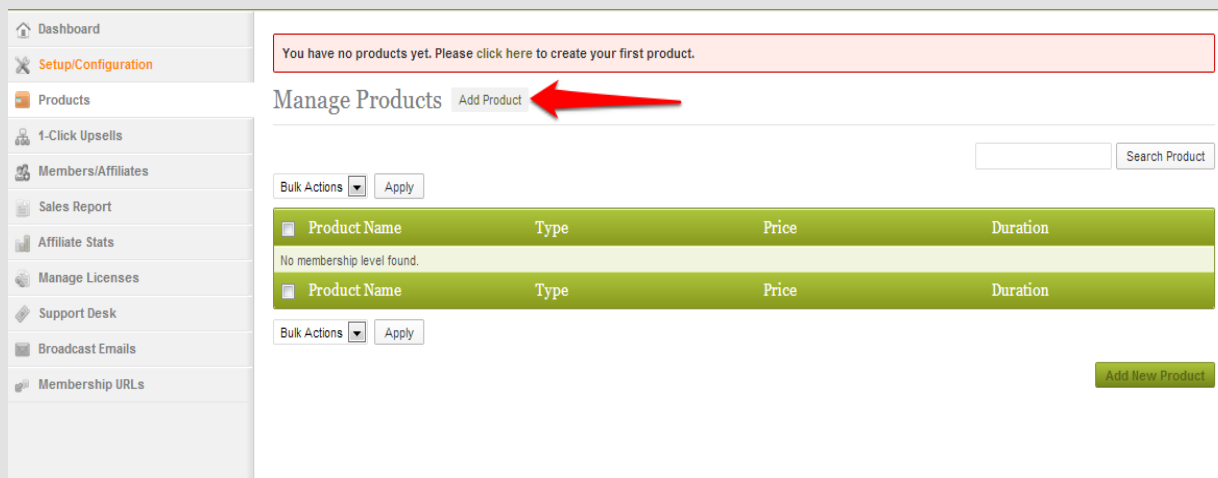
2. Click the **Products** menu option on the list of menu options in the InstaMember Dashboard.



- After clicking the menu option, you will see the products page (like the one below) where you can manage the different products you want to sell in your site.

The screenshot shows the 'Manage Products' page. On the left is the same sidebar menu as in the previous screenshot. The main content area has a header 'Manage Products' with an 'Add Product' button. Below this is a red message box stating 'You have no products yet. Please click here to create your first product.' Below the message box is a search bar with a 'Search Product' button. Below the search bar is a table with columns: Product Name, Type, Price, and Duration. The table is currently empty, with a message 'No membership level found.' displayed below the header. Below the table is a 'Bulk Actions' dropdown menu and an 'Apply' button. At the bottom right of the page is an 'Add New Product' button.

- Click **Add Product** to add a new product.



5. This will open the Add Product page where you can start customizing your new product.

The 'Add New Product' form contains the following fields and options:

- * Product Name:** A text input field.
- * Sales Page (URL):** A text input field with 'http://' pre-filled.
- * Payment Type:** Radio buttons for 'Lifetime (one-time payment)' (selected), 'Subscription/Recurring Payment', and 'Free Membership'.
- * Regular Price:** A text input field with '97.00' pre-filled.
- * Accepted Payments:** A toggle switch set to 'OFF' with 'PayPal Standard' text.
- Note:** Options to integrate with 3rd-party payment systems (e.g. ClickBank, DigiResults, WSO Pro, JVZoo, etc) will be available after this product is created.
- * Members Download Page [?]:** A dropdown menu with '-- Select a post or page --'.
- Choose a post/page as the members download area for this product.**
- Order Steps [?]:** A section with the instruction 'Simply drag n drop to arrange the order steps' and two draggable items: 'Registration' and 'Payment'.
- After Purchased Redirect (URL) [?]:** A text input field with 'http://' pre-filled.
- Note:** New customers will be redirected to this page after purchased (must include 'http://'). If you leave this blank, the new customers will be taken to the members download area.

- **Product Name:** The name of the product you wish to sell
- **Sales Page (URL):** The specific link to the sales page of the product you want to sell.
- **Payment Type**
 - **Lifetime (One-time Payment):** Select this if you want the customer to have a life time access on the product with one single payment only.
 - **Subscription/Recurring Payment:** This is the type of payment that bills the customers a specific amount that depends on the number of days and times you set it to.
 - **Free Membership:** Offers no charge membership option to customers

Note: Different options are available depending on what payment type you want your product to have. We will cover how to add product using the 3 different payment types.

Adding a Product Using Lifetime (One-time Payment)

This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site. Furthermore, you have done setting up the necessary configurations of your membership site via the Setup/Configuration option, specifically Payments.

*Note: Fields that are marked with * is required.*

1. Fill in the **Product Name** with the name of the product you want to sell
2. Fill in the **Sales Page (URL)** field with the specific sales page for the product you are selling.
3. By default, **Lifetime (One-time Payment)** is selected in the Payment Type options.
4. Fill in the **Regular Price** field with the amount the product is sold at.
5. Turn the **Accepted Payments** on, to choose from the list of payment gateways you want the product to be processed during a transaction.
6. Choose from the dropdown menu of **Members Download Page**, the page where the customers can download the product if it is a digital product. However, if this product is a membership type, then you can choose the homepage of that specific membership level. Either way, the page that is set on this field will automatically be protected and will not be visible on the nonmembers.
7. The **Order Steps** is a drag-and-drop option you can set depending on how you want the order of purchase to be.
8. **After Purchased Redirect (URL)** field should be filled in with the url of where you want the customers to be taken after they make a purchase. If this field is left blank, the **Members Download Page** in step 6 will be used instead.
9. Click **Save Product** to successfully add your product.

Add New Product

- Product Name**
- Sales Page (URL)**
- Payment Type**

☒ Lifetime (one-time payment)
☐ Subscription/Recurring Payment
☐ Free Membership
- Regular Price**
- Accepted Payments**

☒ ON ☐ OFF

Note: Options to integrate with 3rd-party payment systems (e.g. ClickBank, DigiResults, WSO Pro, JVZoo, etc) will be available after this product is created.
- Members Download Page**

Choose a post/page as the members download area for this product.
- Order Steps**

Simply drag n drop to arrange the order steps
- After Purchased Redirect (URL)**

New customers will be redirected to this page after purchased (must include 'http://'). If you leave this blank, the new customers will be taken to the members download area above.

Adding a Product Using Subscription/Recurring Payment

This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site. Furthermore, you have done setting up the necessary configurations of your membership site via the Setup/Configuration option, specifically Payments.

*Note: Fields that are marked with * is required.*

1. Fill in the **Product Name** with the name of the product you want to sell
2. Fill in the **Sales Page (URL)** field with the specific sales page for the product you are selling.
3. By default, Lifetime (One-time Payment) is selected in the Payment Type options. Select **Subscription/Recurring Payment** radio button.
4. A switch to enable to disable trial period will appear. By default it is turned off. If you want to enable a trial period, turn the switch on to have the trial options appear. Set the trial option according to your preferences. Set the dropdown menu to '0' if you would like to offer it as a free trial.
5. The **Subscription/Rebill Price** is where you will have to set the price of the product every period (set in days) of your preference.
6. Set **Bill Times** according to your preferred number of billing times you want the customer to have. This will be the total number of times the customer will be billed, including the first payment (if you enable Trial,

even if it's not free, InstaMember will NOT count it as first payment). Set this to '0' to bill the customer forever (or until cancelled).

7. Turn the **Accepted Payments** on, to choose from the list of payment gateways you want the product to be processed during a transaction.
8. Choose from the dropdown menu of **Members Download Page**, the homepage of that specific membership level. This field will automatically be protected and will not be visible on the nonmembers.
9. The **Order Steps** is a drag-and-drop option you can set depending on how you want the order of purchase to be.
10. **After Purchased Redirect (URL)** field should be filled in with the url of where you want the customers to be taken after they make a purchase. If this field is left blank, the **Members Download Page** in step 6 will be used instead.
11. Click **Save Product** to successfully add your product.

The screenshot shows the InstaMember product setup form with the following fields and settings:

- 1 * Product Name:** Product X
- 2 * Sales Page (URL):** <http://thesuzannaproject.com/demo/sales-page/>
- 3 * Payment Type:** ☒ Subscription/Recurring Payment (Other options: Lifetime (one-time payment), Free Membership)
- 4 Trial Price:** 1.00 for 7 Day(s). ☒ Enable Trial Period. (Note: Set the trial price to '0' (zero) for free trial)
- 5 * Subscription/Rebill Price:** 97.00 every 30 Day(s)
- 6 Bill Times:** 0 Times. (Note: Total number of times the customer will be billed, including the first payment (if you enable Trial, even if it's not free, InstaMember will NOT count it as first payment). Set this to '0' to bill the customer forever (or until cancelled).)
- 7 * Accepted Payments:** ☒ ON. PayPal Standard. (Note: Options to integrate with 3rd-party payment systems (e.g. ClickBank, DigiResults, WSO Pro, JVZoo, etc) will be available after this product is created.)
- 8 * Members Download Page [?]:** Download Page. (Note: Choose a post/page as the members download area for this product.)
- 9 Order Steps [?]:** Simply drag n drop to arrange the order steps. Steps: Registration, Payment.
- 10 After Purchased Redirect (URL) [?]:** (Empty field). (Note: New customers will be redirected to this page after purchased (must include 'http://'). If you leave this blank, the new customers will be taken to the members download area above.)

Adding a Product Using Free Membership

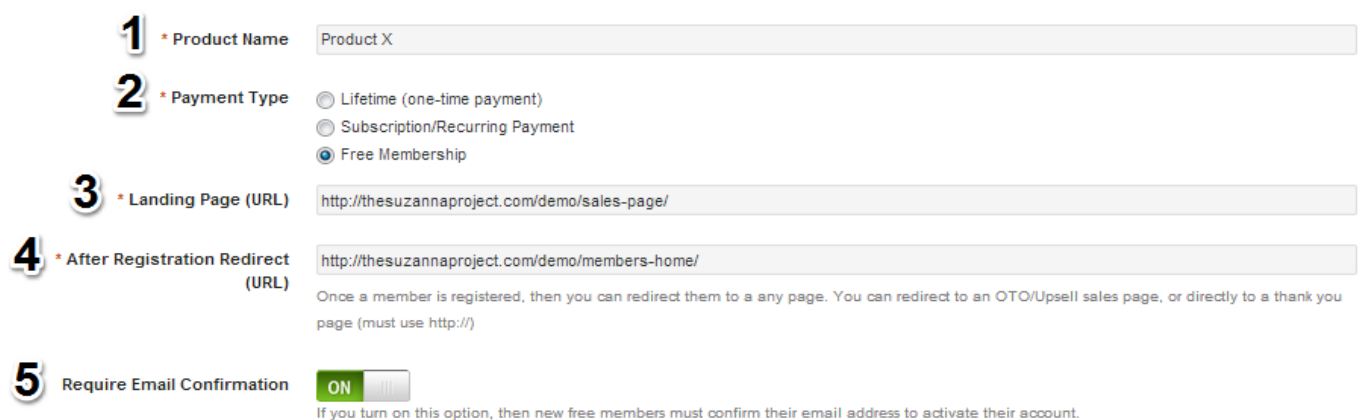
This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site. Furthermore, you have done

setting up the necessary configurations of your membership site via the Setup/Configuration option.

*Note: Fields that are marked with * is required.*

1. Fill in the **Product Name** with the name of the product you want to sell
2. By default, Lifetime (One-time Payment) is selected in the Payment Type options. Select **Free Membership** radio button.
3. Fill in the **Landing Page (URL)** field with the specific landing page for the product.
4. Fill in the **After Registration Redirect** field with the url you want the customers who registered to this membership level to be redirected to. You can redirect to an OTO/Upsell sales page, or directly to a thank you page.
5. You can set **Require Email Confirmation** option on if you want the customers that registered to confirm their registration. By default, this option is off.
6. Click **Save Product** to successfully add your product.

Add New Product



1 * Product Name

2 * Payment Type ☐ Lifetime (one-time payment)
☐ Subscription/Recurring Payment
☒ Free Membership

3 * Landing Page (URL)

4 * After Registration Redirect (URL)
Once a member is registered, then you can redirect them to a any page. You can redirect to an OTO/Upsell sales page, or directly to a thank you page (must use http://)

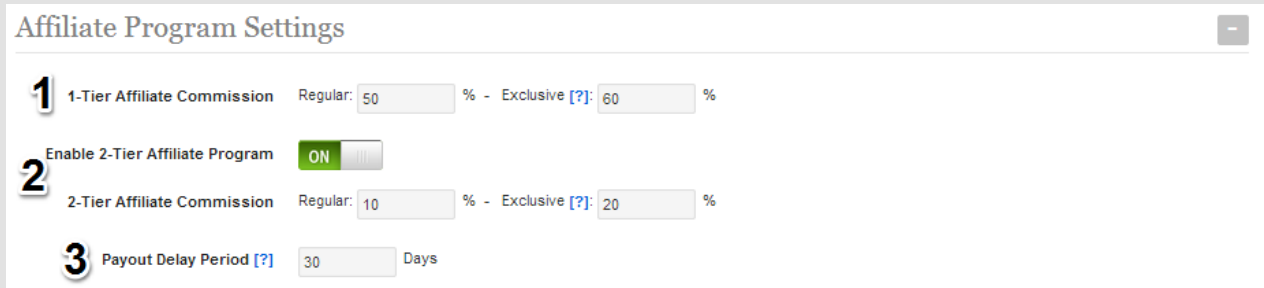
5 Require Email Confirmation ☒ ON
If you turn on this option, then new free members must confirm their email address to activate their account.

The Affiliate Program Settings

This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site. Furthermore, this setting is only available for Lifetime (One-time Payment) and Subscription/Recurring Payment types.

1. Set **1-Tier Affiliate Commission** according to your preferences.
2. If you want to add another affiliate program for this product, turn **Enable 2-Tier Affiliate Program** on, to activate the affiliate options. Set it up according to your preferences.

3. Set the **Payout Delay Period** according to your preference on when (x number of delay days) you want the commission to get paid. For example, by default this is set to 30 days. Commissions will only be paid after 30 days the product had been purchased.



Affiliate Program Settings

1 1-Tier Affiliate Commission Regular: 50 % - Exclusive [?]: 60 %

2 Enable 2-Tier Affiliate Program ☒ ON

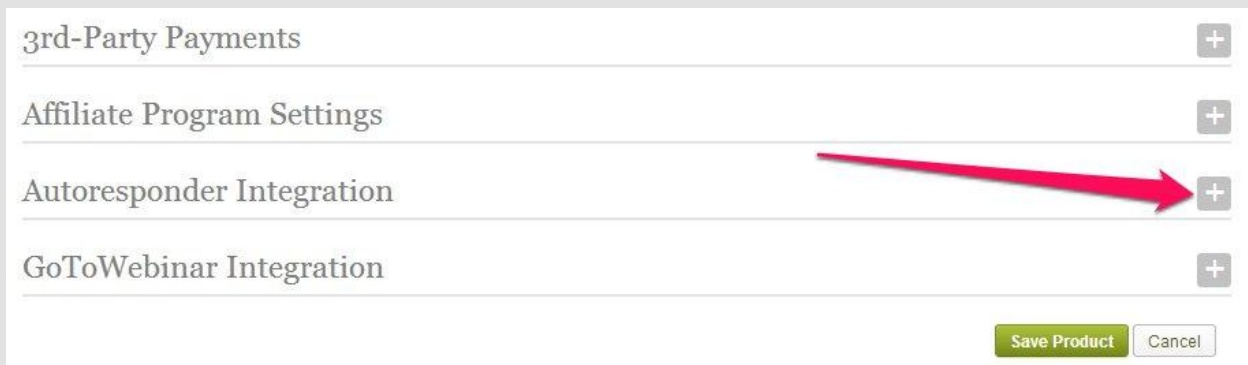
2-Tier Affiliate Commission Regular: 10 % - Exclusive [?]: 20 %

3 Payout Delay Period [?] 30 Days

AutoResponder Integration

*This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site. It should also be noted, that you already have setup the autoresponder you wish to integrate in this specific product in the **Setup/Configuration -> Integration** page. Furthermore, this setting is available for All Payment types.*

1. Expand the Autoresponder Integration tab by clicking the plus(+) icon.



3rd-Party Payments +

Affiliate Program Settings +

Autoresponder Integration +

GoToWebinar Integration +

Save Product Cancel

2. By default, the Autoresponder Integration switch is turned off. Turn it on to start using the feature.



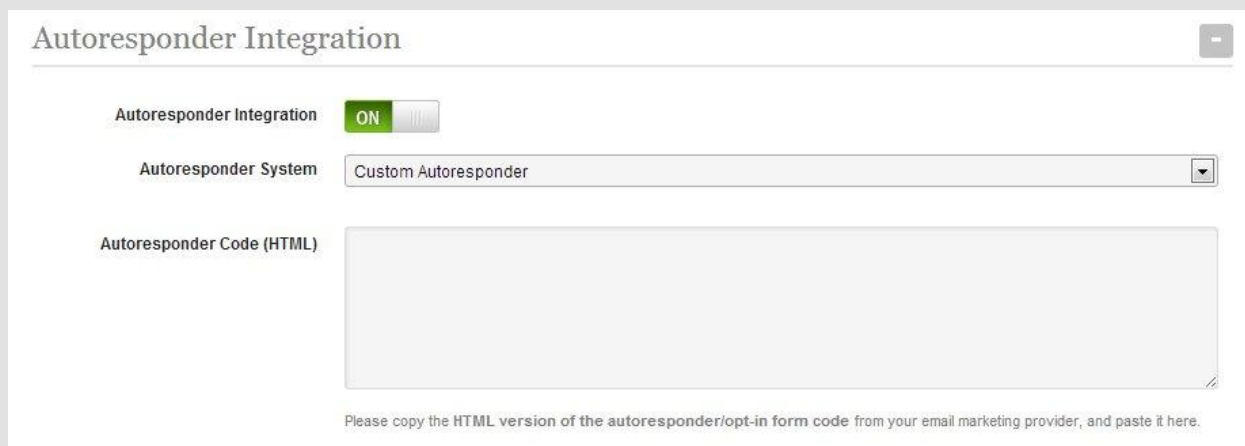
Autoresponder Integration

Autoresponder Integration ☒ ON

Autoresponder System GetResponse

Select Campaign/List Name instamembers Reload List

- **Autoresponder System** – this dropdown contains options of autoresponders you can choose from. It has to be noted that the only available options would be the autoresponders you have successfully setup on the **Setup/Configuration -> Integrations** page. Other than that, the only available option would be the **Custom Autoresponder**.
 - **Custom Autoresponder** – this option is especially intended to those who are using autoresponders other than the ones listed and configurable in the **Setup/Configuration -> Integrations** page. When this option is selected, the **Autoresponder Code (HTML)** will appear. This is a textarea where you can paste in the raw html code generated from your autoresponder services provider.



Autoresponder Integration

Autoresponder Integration **ON**

Autoresponder System Custom Autoresponder

Autoresponder Code (HTML)

Please copy the HTML version of the autoresponder/opt-in form code from your email marketing provider, and paste it here.

- **Select Campaign/List Name** – this dropdown contains a list of your campaigns and list names on the specific autoresponder system you have chosen. If the campaign you wish to use is not listed, you may refresh the list by clicking the refresh list button beside the dropdown field.

GoToWebinar Integration

This guide assumes that you have already logged in and successfully installed InstaMember to your wordpress site. Furthermore, this setting is available for All Payment types.

1. To enable the option of having your customers that purchased the product join your webinar, turn **Enable GoToWebinar** on. This option is turned off by default. You can add as much as 7 webinars per product.

GoToWebinar Integration

1

Enable GoToWebinar

ON

If you want to automatically register new customers to your webinars, then you can enable this option.

You can integrate up to 7 webinars per product.

GoToWebinar Registration URL

#1

Please create a webinar in your GoToWebinar account, and enter the full URL to your webinar registration here.

GoToWebinar Registration URL

#2

Please create a webinar in your GoToWebinar account, and enter the full URL to your webinar registration here.

GoToWebinar Registration URL

#3

Please create a webinar in your GoToWebinar account, and enter the full URL to your webinar registration here.

Note: Once done with the integrations, do not forget to update your setting changes by clicking the **Save** button.

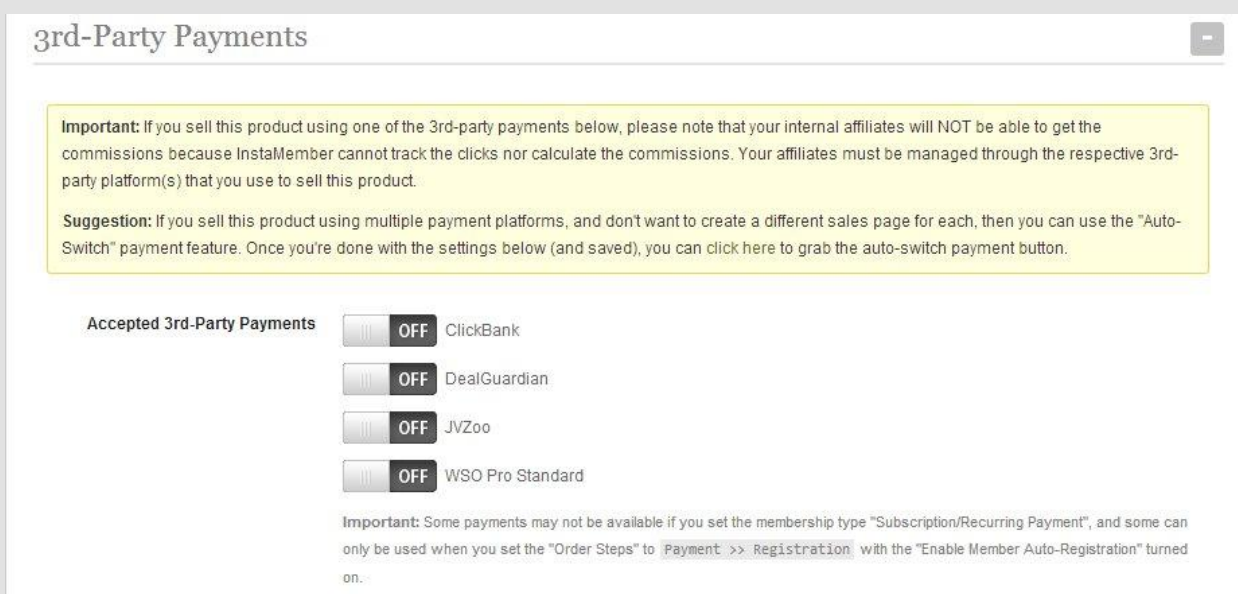
How to Edit/Manage a Product

Note: This option would only be applicable if you already have created a product.

After you have successfully setup your preferred payment gateways in the **Setup/Configuration** page specifically the 3rd-Party Payments (if applicable), the **3rd Party Payments** tab in the **Edit Product** page would be activated.



Click the plus (+) sign to expand the tab and configure the options available.



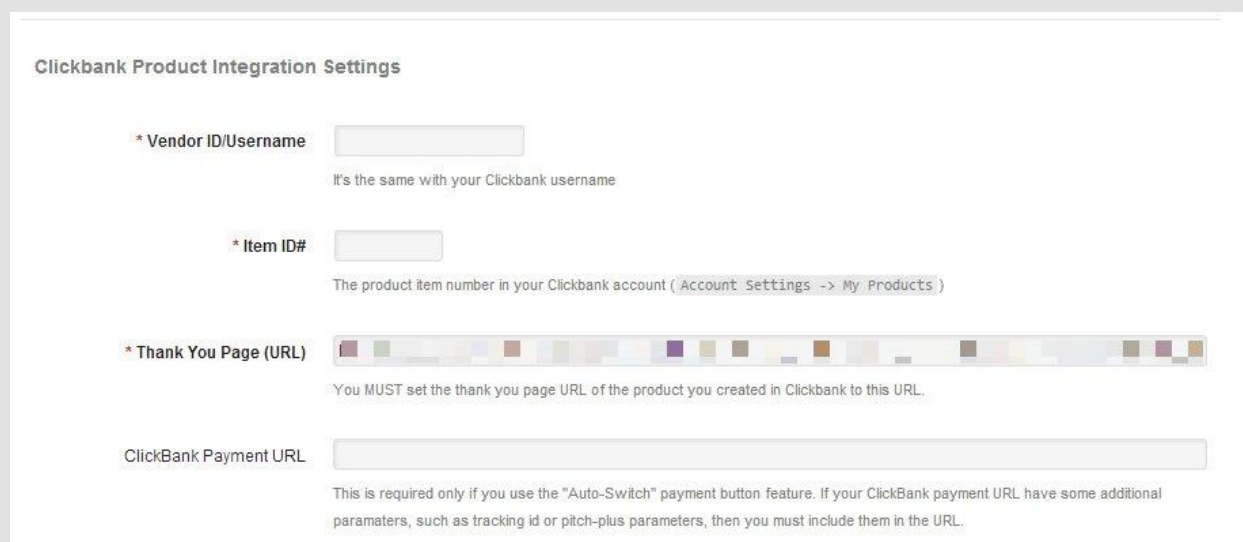
Important: If you sell this product using one of the 3rd-party payments below (which you have successfully setup on the **Setup/Configuration -> Payments** page), please note that your internal affiliates will NOT be able to get the commissions because InstaMember cannot track the clicks nor calculate the commissions. Your affiliates must be managed through the respective 3rd-party platform(s) that you use to sell this product.

Suggestion: If you sell this product using multiple payment platforms, and don't want to create a different sales page for each, then you can use the "Auto-Switch" payment feature. Once you're done with the settings below (and saved), you can click here to grab the auto-switch payment button (which is further discussed later on this manual).

Turn the switch on to any of the 3rd payment gateways you would like this specific product to be sold.

Important: Some payments may not be available if you set the membership type "Subscription/Recurring Payment", and some can only be used when you set the "Order Steps" to Payment >> Registration with the "Enable Member Auto-Registration" turned on.

When the switch is turned on for a specific 3rd party payment gateway, it would show that payment gateway's product integration settings.



The screenshot shows a form titled "Clickbank Product Integration Settings". It contains four fields:

- * Vendor ID/Username:** A text input field. Below it, a note says "It's the same with your Clickbank username".
- * Item ID#:** A text input field. Below it, a note says "The product item number in your Clickbank account (Account Settings -> My Products)".
- * Thank You Page (URL):** A text input field with a color-coded background. Below it, a note says "You MUST set the thank you page URL of the product you created in Clickbank to this URL."
- ClickBank Payment URL:** A text input field. Below it, a note says "This is required only if you use the 'Auto-Switch' payment button feature. If your ClickBank payment URL have some additional paramaters, such as tracking id or pitch-plus parameters, then you must include them in the URL."

This is very important when you offer your products into different 3rd party payment gateways because the product integration settings contains the thank you page (URL) which is mostly required by Instamember's supported gateways to be included on the product settings on your registered account for that specific site. Furthermore, the thank you page url also would enable people to get connected to the affiliate platform such as that with JVzoo, etc.

In addition, when you have also successfully integrated an autoresponder to the **Setup/Configuration** page, a new tab will appear on the edit product page. This is very useful in sending out the latest news and updates as well as announcements such as events or promotions of that specific product to the members.

Autoresponder Integration



Click the plus (+) sign to expand the tab and configure the options available. Then the turn the switch on which is by default turned off.



Autoresponder Integration

Autoresponder Integration **ON**

Autoresponder System GetResponse

Select Campaign/List Name socialpowerpluginbuyers Reload List

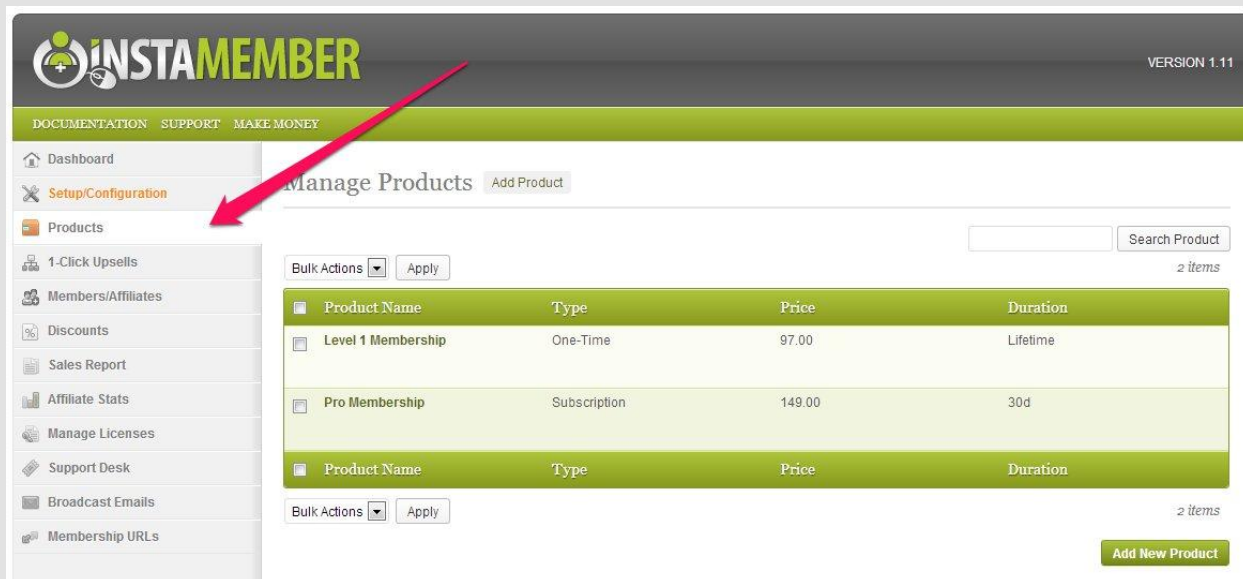
From the **Autoresponder System** dropdown, select which amongst the autoresponders you have successfully setup in the integration section of **Setup/Configuration** you would like to use for this product. **Note:** *Each autoresponder you use will have unique options to complete the successful integration of the autoresponder to the product.* Then from the **Select Campaign List Name** dropdown, select which of the campaigns would you like to use for this product. You will have to create the campaign and recommended that it is setup first and foremost before setting this portion of editing the product. Lastly, if you were not able to find any of your campaigns in the dropdown, the refresh list button would refresh the campaign list for that autoresponder.

Protect Contents

This option would enable you to bulk manage content protection. It allows you to protect not just your posts and pages, but your local files and Amazon s3 files as well.

A very important note to be reminded of, when using s3 in protecting files. If you have decided to protect a certain bucket in your Amazon s3 account, all files that are inside it will **ONLY** be accessible by InstaMember. Thus, it is highly recommended that you create a special bucket intended to the sole purpose of using it in protecting files with InstaMember. The rest of your files which is not included with file protection with InstaMember should be stored in a separate bucket.

1. To manage content protection, go to **Products** in your InstaMember page.



INSTAMEMBER VERSION 1.11

DOCUMENTATION SUPPORT MAKE MONEY

Dashboard Setup/Configuration Products 1-Click Upsells Members/Affiliates Discounts Sales Report Affiliate Stats Manage Licenses Support Desk Broadcast Emails Membership URLs

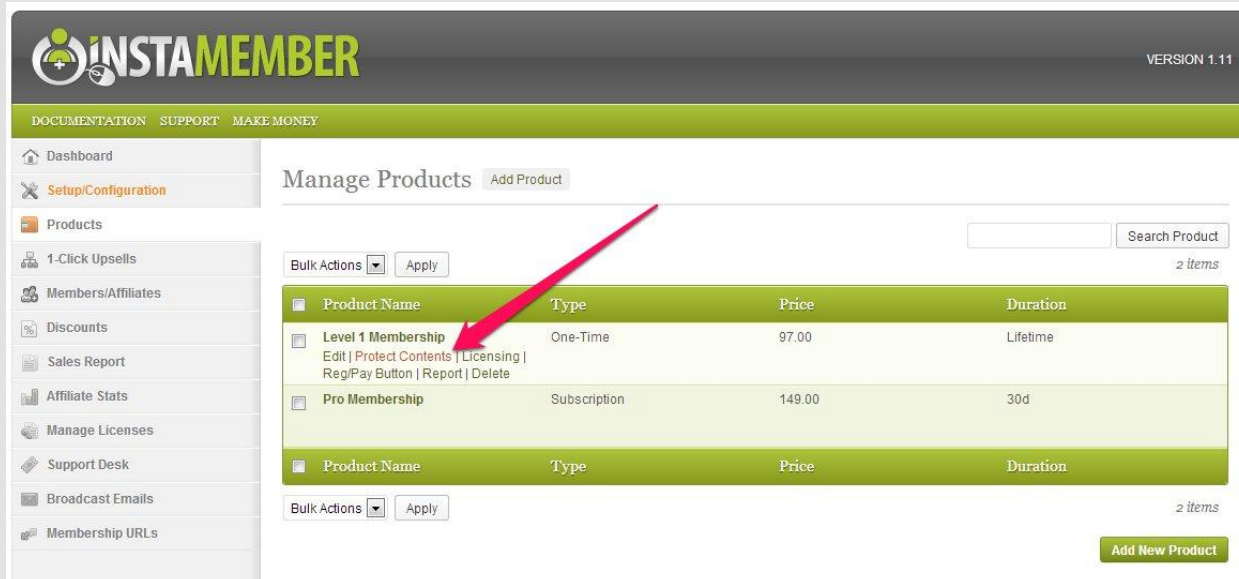
Manage Products Add Product

Bulk Actions Apply Search Product 2 items

Product Name	Type	Price	Duration
Level 1 Membership	One-Time	97.00	Lifetime
Pro Membership	Subscription	149.00	30d

Bulk Actions Apply 2 items Add New Product

2. Hover your mouse below the product name you want to manage content protection to make the **Protect Contents** option visible.



INSTAMEMBER VERSION 1.11

DOCUMENTATION SUPPORT MAKE MONEY

Dashboard Setup/Configuration Products 1-Click Upsells Members/Affiliates Discounts Sales Report Affiliate Stats Manage Licenses Support Desk Broadcast Emails Membership URLs

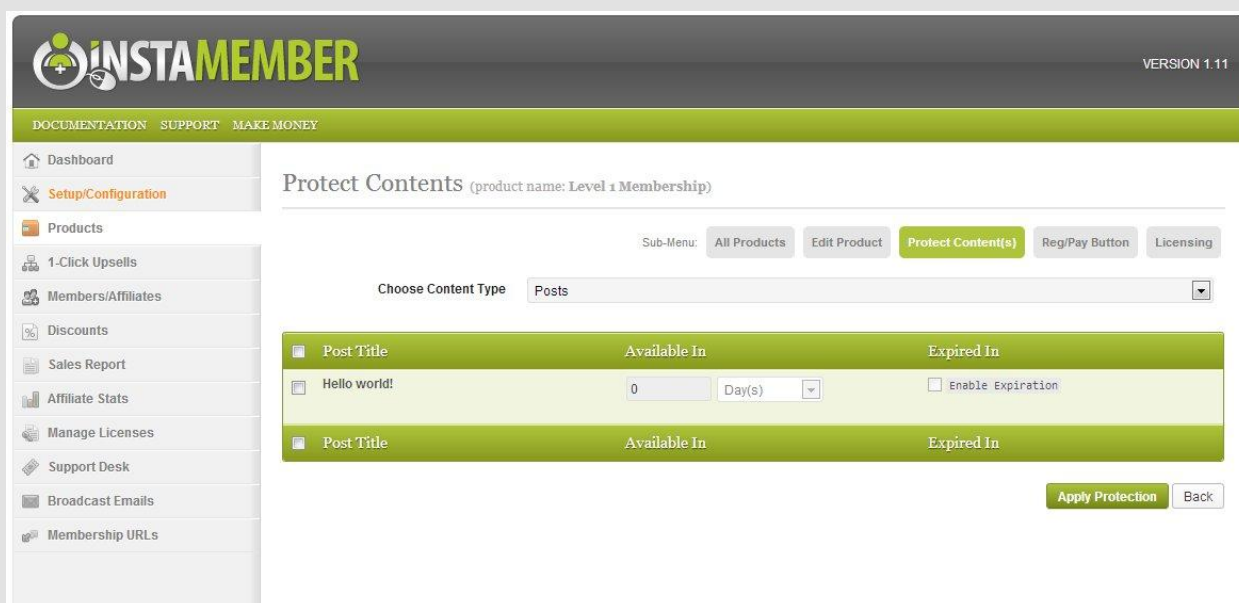
Manage Products [Add Product](#)

Bulk Actions ☐ Apply Search Product 2 items

<input type="checkbox"/> Product Name	Type	Price	Duration
<input type="checkbox"/> Level 1 Membership Edit Protect Contents Licensing Reg/Pay Button Report Delete	One-Time	97.00	Lifetime
<input type="checkbox"/> Pro Membership	Subscription	149.00	30d

Bulk Actions ☐ Apply 2 items [Add New Product](#)

3. Click **Protect Contents** to start managing content protection option.



INSTAMEMBER VERSION 1.11

DOCUMENTATION SUPPORT MAKE MONEY

Dashboard Setup/Configuration Products 1-Click Upsells Members/Affiliates Discounts Sales Report Affiliate Stats Manage Licenses Support Desk Broadcast Emails Membership URLs

Protect Contents (product name: Level 1 Membership)

Sub-Menu: [All Products](#) [Edit Product](#) **[Protect Content\(s\)](#)** [Reg/Pay Button](#) [Licensing](#)

Choose Content Type

<input type="checkbox"/> Post Title	Available In	Expired In
<input type="checkbox"/> Hello world!	<input type="text" value="0"/> Day(s)	<input type="checkbox"/> Enable Expiration
<input type="checkbox"/> Post Title	Available In	Expired In

[Apply Protection](#) [Back](#)

- **Choose Content Type** – this dropdown contains the content types that InstaMember content protection is applicable.
 - **Posts** – if this option is selected, it will list down all the posts published in your website.
 - **Pages** – this will list down all pages that are published in your website
 - **Local Files** - this will list down all the files (audios, videos, images and documents) inside your website.

- **Amazon S3 Files** – this will list down all the files (audios, videos, images and documents) inside your Amazon s3 account.
 - **Protect Contents Table** – this table with 3 columns is where all contents are listed depending on what content type you chose from the dropdown.
 - **Page/Post Title or File Name** – the first column lists down all the page/post title published in your site if you select page or post content types. On the other hand, if you chose local or amazon s3 files, this will show the file names.
 - **Available In** – this column can only be configured if you will tick on the checkbox beside the post/page title or file name you would like to make the content be available for a specific period of time. You may set it in days, weeks, months, years or even a specific date all depending on your preference.
 - **Expired In** – just like the **Available In** column, this can only be configured if you will tick on the checkbox beside the post/page title or file name you would like to make the content to expire in a specific period of time. You may set it in days, weeks, months, years or even a specific date all depending on your preference.
4. Once you are done setting up content protection to all the contents and files you want, save the changes you made by clicking **Apply Protection** button.

INSTAMEMBER VERSION 1.11

DOCUMENTATION SUPPORT MAKE MONEY

Dashboard Setup/Configuration Products 1-Click Upsells Members/Affiliates Discounts Sales Report Affiliate Stats Manage Licenses Support Desk Broadcast Emails Membership URLs

Protect Contents (product name: Level 1 Membership)

Sub-Menu: All Products Edit Product **Protect Content(s)** Reg/Pay Button Licensing

Choose Content Type Posts

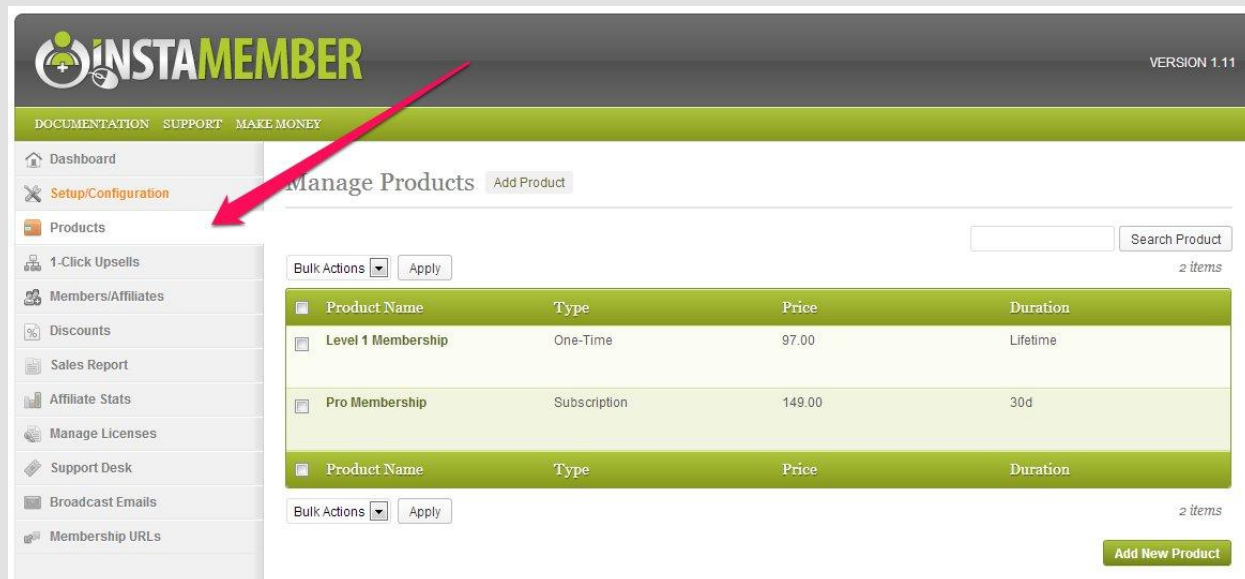
Post Title	Available In	Expired In
<input type="checkbox"/> Hello world!	0 Day(s)	<input type="checkbox"/> Enable Expiration
<input type="checkbox"/> Post Title	Available In	Expired In

Apply Protection Back

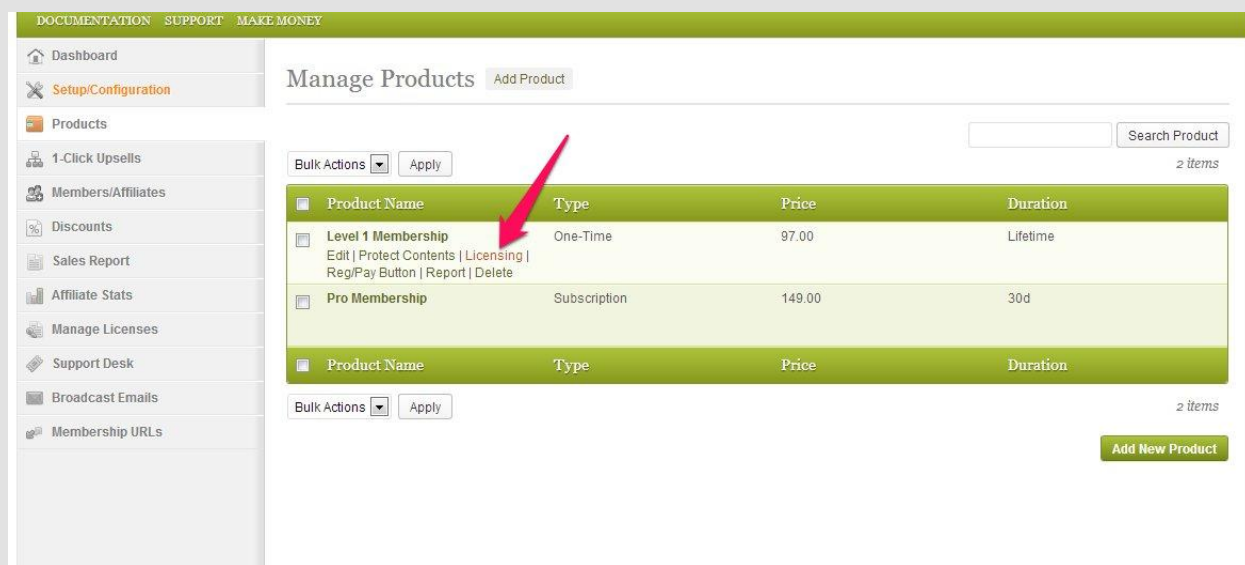
Licensing

This InstaMember feature will enable you to further enhance the security of your products by applying licenses that you can freely setup according to your preferences.

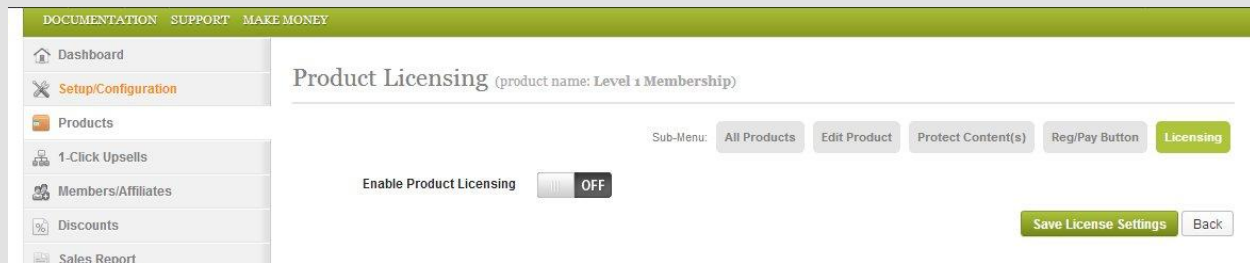
1. To apply the licensing feature, go to **Products** in your InstaMember page.



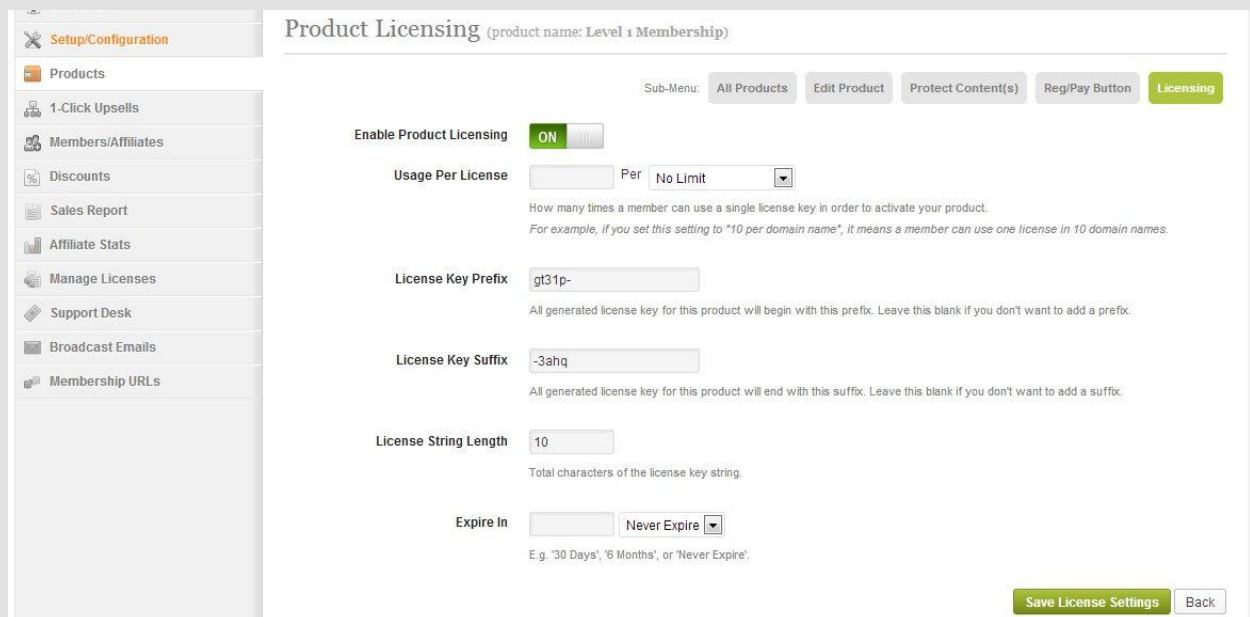
2. Hover your mouse below the product name you want to manage licensing feature to make the option visible.



3. Click **Licensing** to start setting up the licensing feature for that specific product.



4. By default, the switch **Enable Product Licensing** is disabled. Switch it on to start using the licensing feature. This then will make the options visible.



- **Usage Per License** – this option should be a numerical value (except that you won't need to fill it out if you choose no limit on the license usage) which corresponds to the number of times the user can use the license produced. On the input fields right side is a dropdown that contains the options on what instances the use of license is applicable (**per domain name, per server or per user IP address**). For example, if you set this setting to "10 per domain name", it means a member can use one license in 10 domain names.
- **License Key Prefix** – this is an alphanumeric value from which all generated license key for this product will begin. Leave this blank if you don't want to add a prefix.

- **License Key Suffix** - this is an alphanumeric value from which all generated license key for this product will end. Leave this blank if you don't want to add a suffix.
 - **License Key String** – this is a numerical value which corresponds to the number of characters of the license key generated.
 - **Expires In** – this option will determine the expiration date of any license key generated for this specific product. By default it is set to never expire, however, you have the option to set a numerical value equivalent to the number of days, weeks, months and years you want the license key to expire.
5. Once you are done setting up the licensing feature of your product, save the settings or the changes you made by clicking **Save License Settings** button.

The screenshot shows the 'Product Licensing' configuration page for a product named 'Level 1 Membership'. On the left is a sidebar menu with options like 'Setup/Configuration', 'Products', '1-Click Upsells', 'Members/Affiliates', 'Discounts', 'Sales Report', 'Affiliate Stats', 'Manage Licenses', 'Support Desk', 'Broadcast Emails', and 'Membership URLs'. The main content area has a sub-menu with 'All Products', 'Edit Product', 'Protect Content(s)', 'Reg/Pay Button', and 'Licensing' (which is highlighted). The settings include:

- Enable Product Licensing:** A toggle switch set to 'ON'.
- Usage Per License:** A text input field followed by 'Per' and a dropdown menu set to 'No Limit'. Below this is a note: 'How many times a member can use a single license key in order to activate your product. For example, if you set this setting to "10 per domain name", it means a member can use one license in 10 domain names.'
- License Key Prefix:** A text input field containing 'gt31p-'. Below is a note: 'All generated license key for this product will begin with this prefix. Leave this blank if you don't want to add a prefix.'
- License Key Suffix:** A text input field containing '-3ahq'. Below is a note: 'All generated license key for this product will end with this suffix. Leave this blank if you don't want to add a suffix.'
- License String Length:** A text input field containing '10'. Below is a note: 'Total characters of the license key string.'
- Expire In:** A text input field followed by a dropdown menu set to 'Never Expire'. Below is a note: 'E.g. "30 Days", "6 Months", or "Never Expire".'

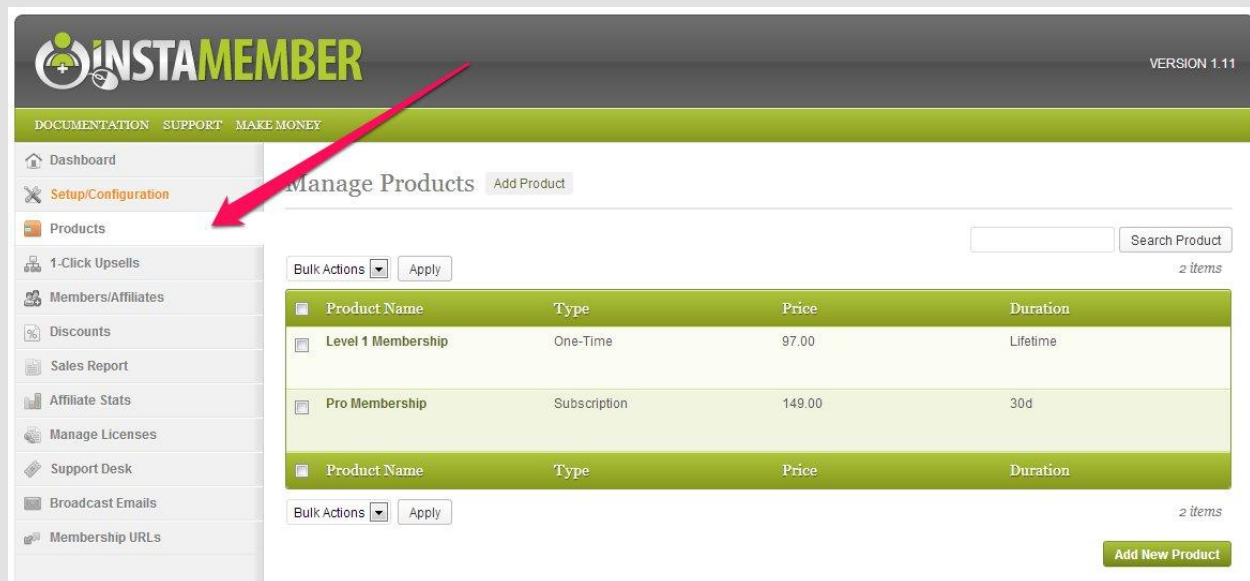
At the bottom right, there is a red arrow pointing to a green button labeled 'Save License Settings' and a 'Back' button.

Reg/Pay Button

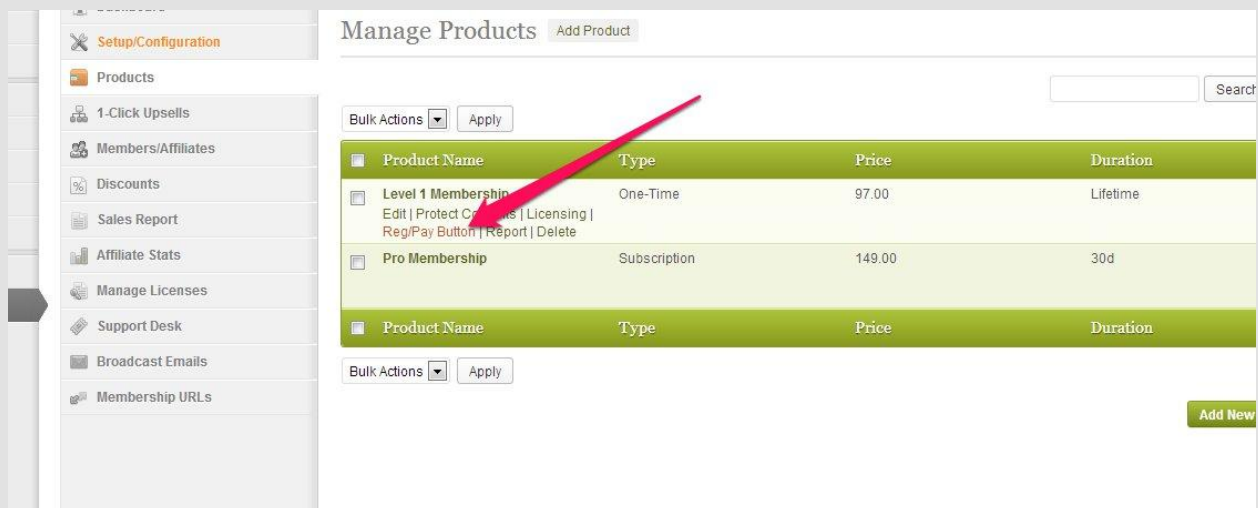
This option handles the customization and installation of your payment or registration button.

Individual Payment URLs & Buttons

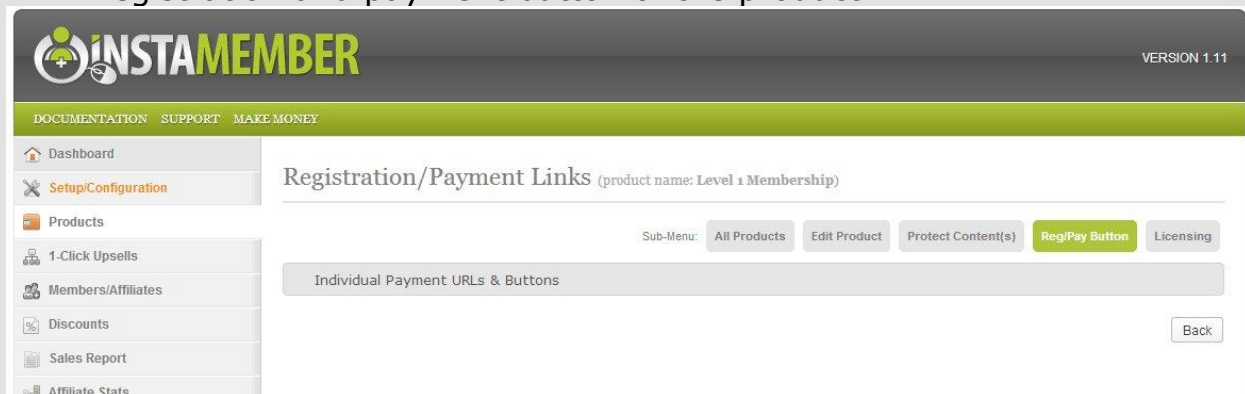
1. To make use of the reg/pay button feature, go to **Products** in your InstaMember page.



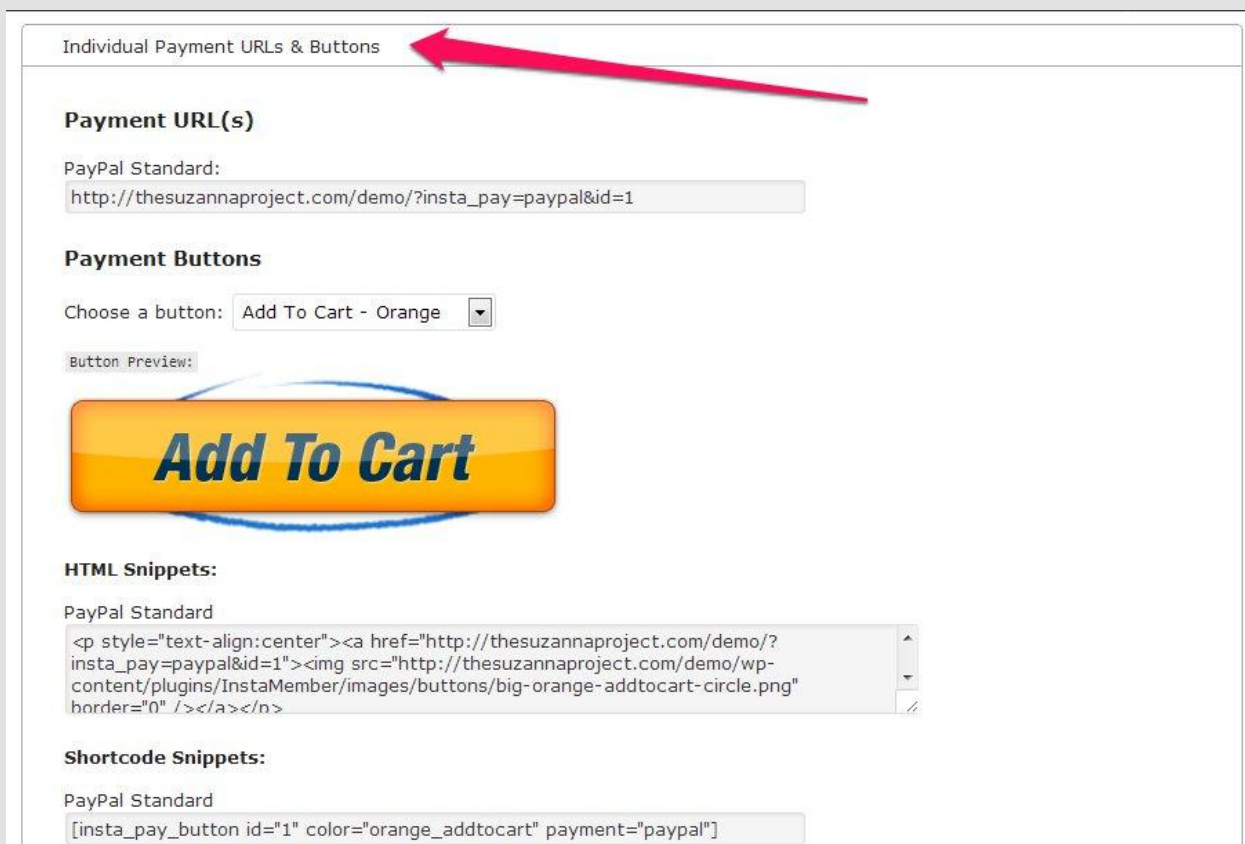
2. Hover your mouse below the product name you want to manage the registration/payment button to make the option visible.



3. Click **Reg/Pay Button** to start setting up and customize the registration and payment button of the product.



4. Click the **Individual Payment URLs & Buttons** tab to show the options in setting and customizing the payment and registration button.



- **Payment URL(s)** – this will show the url that you can use to link texts or images and then redirect the visitor when activated, to the specific payment gateway.

- **Payment Buttons**

- **Choose a Button** – this dropdown contains a wide selection of button styles available for you to use. What makes it more convenient is that for every style you choose, there is a button preview below it so you don't have to go back and forth the page where you would like to embed the button just to check how it looks.
- **HTML Snippets** – this will show html codes specific to a payment method that you can copy and paste to any content of your site where you want the registration or payment button to appear.
- **Shortcode Snippets** – this option is the more convenient way in embedding the registration or payment button of any specific payment method anywhere you want it to appear on your site.

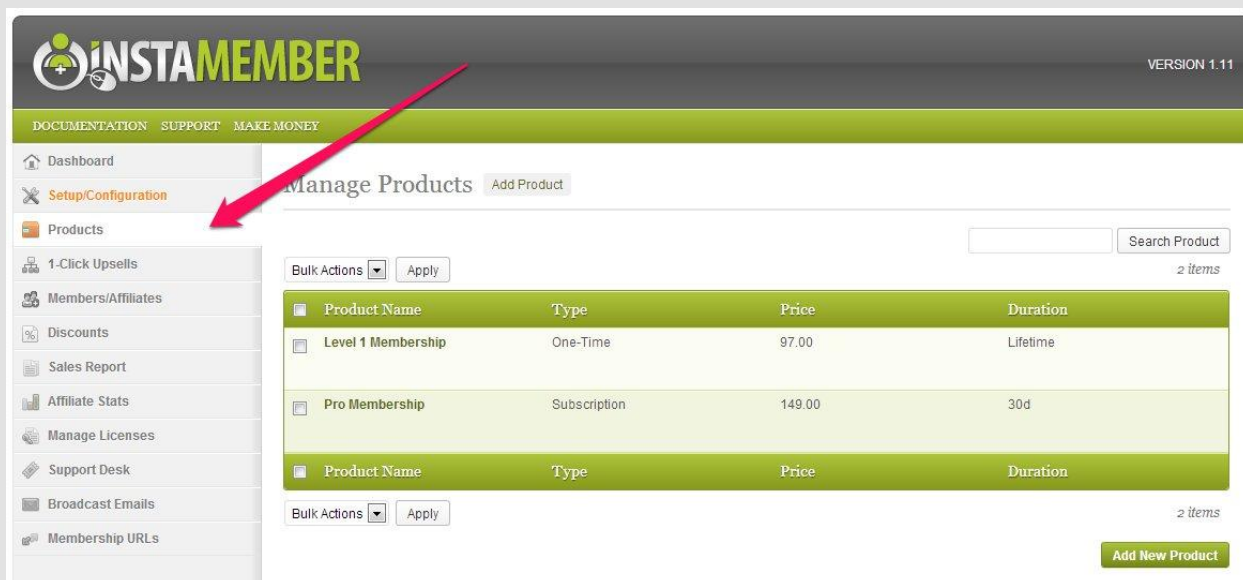
Note: HTML and Shortcode Snippets is dependent on how many successful payment methods you have setup in **Setup/Configuration** page.

5. Copy either the html or shortcode snippets on any content of your site where you want the payment or registration button of that specific product to appear.

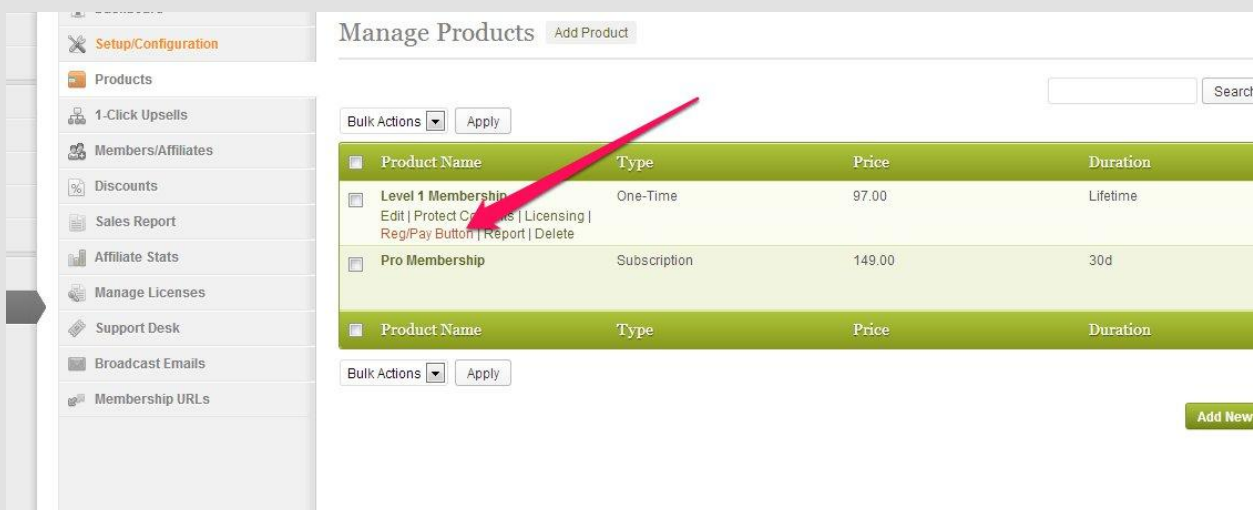
Auto-Switch Payment Button

If you want to use a direct payment (e.g. Paypal) and also sell your product on 3rd-party networks (e.g. Clickbank, JVZoo, DigiResults, etc) but don't want to create new sales page for each payment system, then you can use the auto-switch payment button feature. Create only one sales page, drop the code snippet, and InstaMember will automatically display the "RIGHT" payment button based on the incoming traffic.

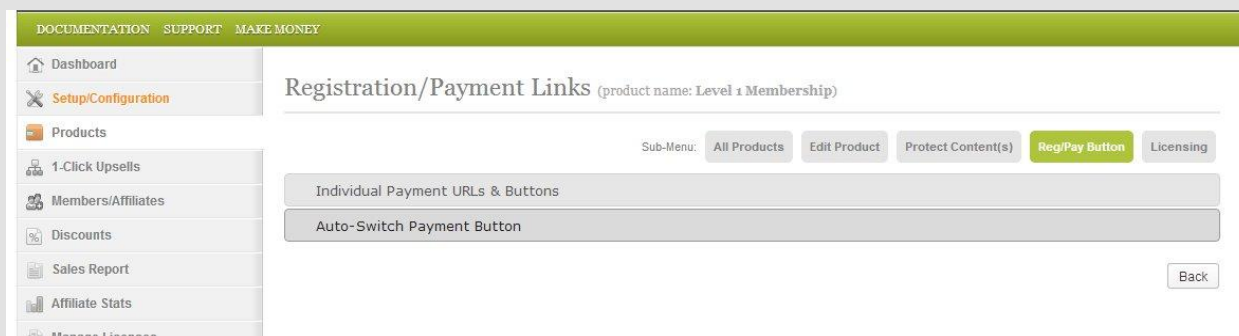
1. To make use of the reg/pay button feature, go to **Products** in your InstaMember page.



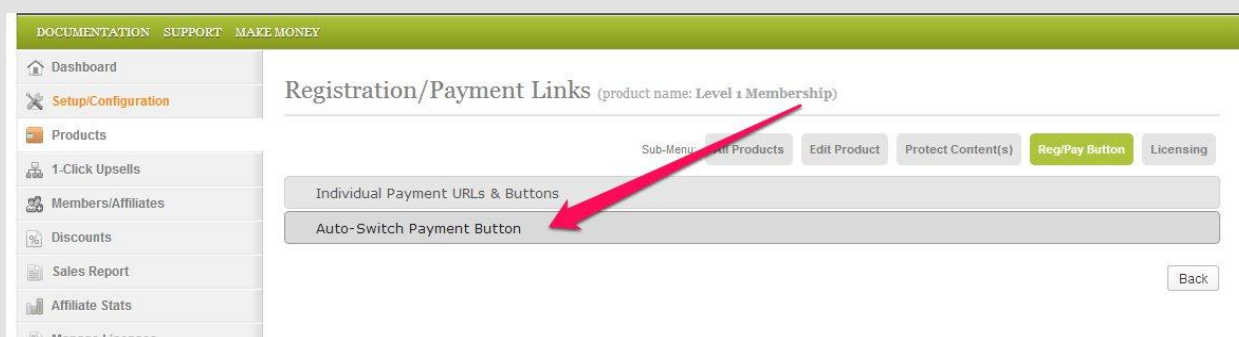
2. Hover your mouse below the product name you want to manage the registration/payment button to make the option visible.



3. Click **Reg/Pay Button** to start setting up and customize the registration and payment button of the product.



4. Click the **Auto-Switch Payment Button** tab to show the options in setting and customizing the payment and registration button using the auto-switch feature.



Auto-Switch Payment Button

If you want to use a direct payment (e.g. Paypal) and also sell your product on 3rd-party networks (e.g. Clickbank, JVZoo, DigiResults, etc) but don't want to create new sales page for each payment system, then you can use the auto-switch payment button feature. Create only one sales page, drop the code snippet, and InstaMember will automatically display the "RIGHT" payment button based on the incoming traffic.

Step #1: Use special sales page URL(s) on each 3rd-party system that you use

Sales page URL For DealGuardian

Please enter this sales page URL in your DealGuardian's product settings:

`http://thesuzannaproject.com/demo/?insta_mode=landing&payment=dealguardian&id=1`

Sales page URL For JVZoo

Please enter this sales page URL in your JVZoo's product settings:

`http://thesuzannaproject.com/demo/?insta_mode=landing&payment=jvzoo&id=1`

Step #2: Put this payment button code on your sales page

Auto-Switch Payment Button Snippet:

Add To Cart - Orange

Please note that if you include JVZoo, DigiResults, WSO Pro, ProductPay and Nanacast in your payment settings, then InstaMember will display the button from each respective payment platform.

Button Preview:



JavaScript Snippet:

```
<script type="text/javascript" src="http://thesuzannaproject.com/demo/?
insta_mode=js_auto&id=1&text=addtocart&color=orange"></script>
```

Shortcode Snippet:

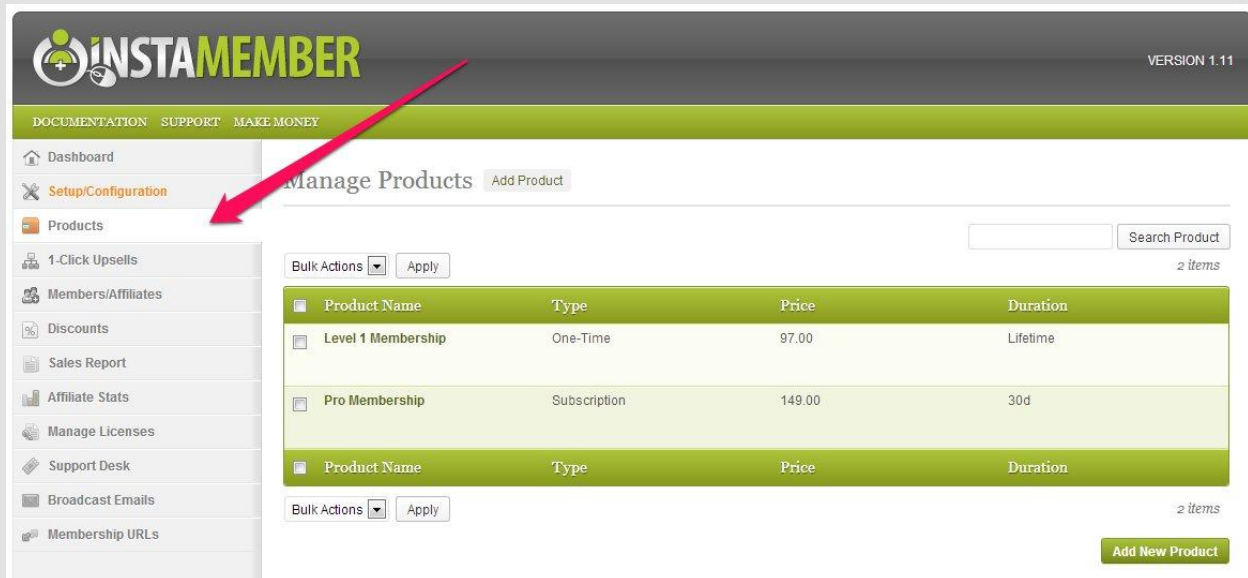
```
[insta_autoswitch_button id="1" color="orange_addtocart"]
```

5. Depending on the number of third-party payment gateway that you have setup on the payment methods of setup/configuration page, will there be special sales page url that would appear. For this demonstration, we have setup DealGuardian and JVZoo thus 2 special sales page url were generated.
6. Copy and paste the url to its respective third-party payment gateway product settings.
7. Step 2 would be to choose your registration or payment button and add the generated code to your sales page.
8. Select from the dropdown menu the button style you want to use to your sales page. Every style you choose will be previewed on below the dropdown so you can immediately see how the button looks and whether it matches your preference.
9. Copy and paste the javascript code to the location where you want the registration or payment button will appear on the sales page. But to make things more convenient, you can also make use of the shortcode found on the **Shortcode Snippet** field and paste it to where you want the button to appear on your sales page.

Report

This option will enable you to view and manage the sales report of a specific product.

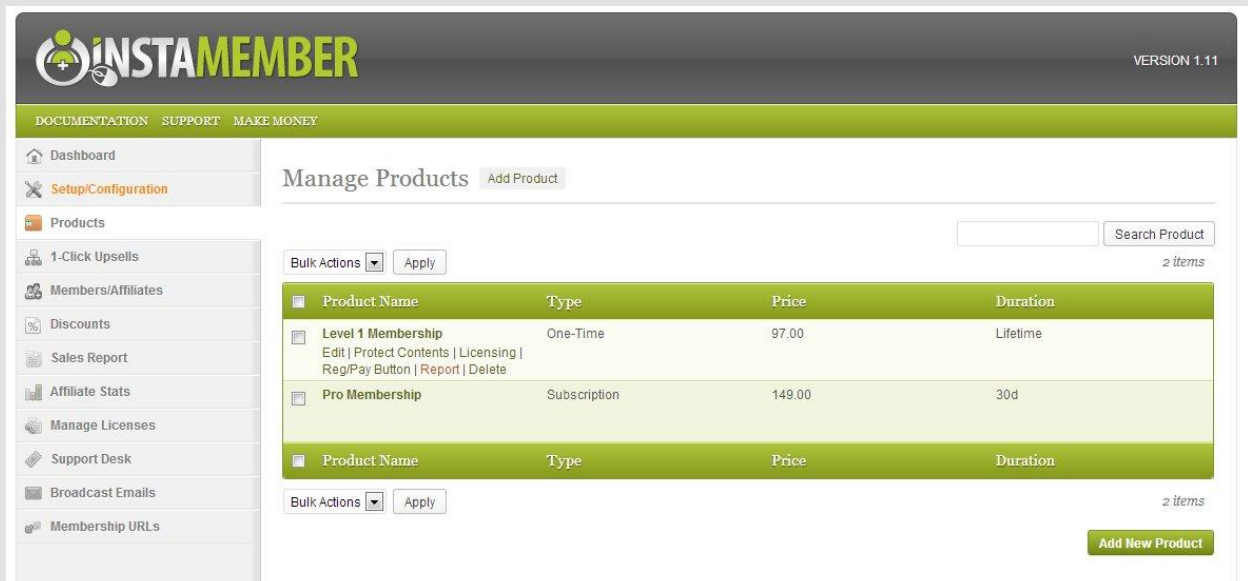
1. To apply the licensing feature, go to **Products** in your InstaMember page.



The screenshot shows the InstaMember dashboard with the 'Manage Products' page active. The left sidebar contains a menu with 'Products' highlighted. A red arrow points to this menu item. The main content area displays a table of products with columns for Product Name, Type, Price, and Duration. The table lists two products: 'Level 1 Membership' (One-Time, 97.00, Lifetime) and 'Pro Membership' (Subscription, 149.00, 30d). Below the table, there are bulk action buttons and a search bar.

Product Name	Type	Price	Duration
Level 1 Membership	One-Time	97.00	Lifetime
Pro Membership	Subscription	149.00	30d

2. Hover your mouse below the product name you want to view and manage the sales report to make the option visible.



The screenshot shows the InstaMember dashboard with the 'Manage Products' page active. The 'Level 1 Membership' product is selected, and the 'Edit | Protect Contents | Licensing | Reg/Pay Button | Report | Delete' options are visible below the product name. The table lists two products: 'Level 1 Membership' (One-Time, 97.00, Lifetime) and 'Pro Membership' (Subscription, 149.00, 30d). Below the table, there are bulk action buttons and a search bar.

Product Name	Type	Price	Duration
Level 1 Membership Edit Protect Contents Licensing Reg/Pay Button Report Delete	One-Time	97.00	Lifetime
Pro Membership	Subscription	149.00	30d

3. Click **Report** to view and manage the sales report of that specific product.

- **Quick Search** – this is a dropdown field that by default is set to show the current day's sales report. Other options include, yesterday, last 7 days, last 30 days and choose a range wherein you can set a specific time frame for sales report checking.
- **Start Date & End Date** – these input fields are intended to be used when you choose to set quick search to choose a range to filter out search results for a product's sales report.
- **Keyword** – this is a powerful InstaMember option where you can enter a specific keyword to filter out the list of sales report for the product that matches the keyword provided.
- **Search Filter:**
 - The first dropdown contains all existing products of the site. Choose any of the products from the dropdown to show only the sales report of any specific product along with the aforementioned filters.
 - The second dropdown contains the transactions available on the site: Paid Only, Unpaid Only and Refund Only.
- Click the **Search** button to start the search process and apply the filter options set.

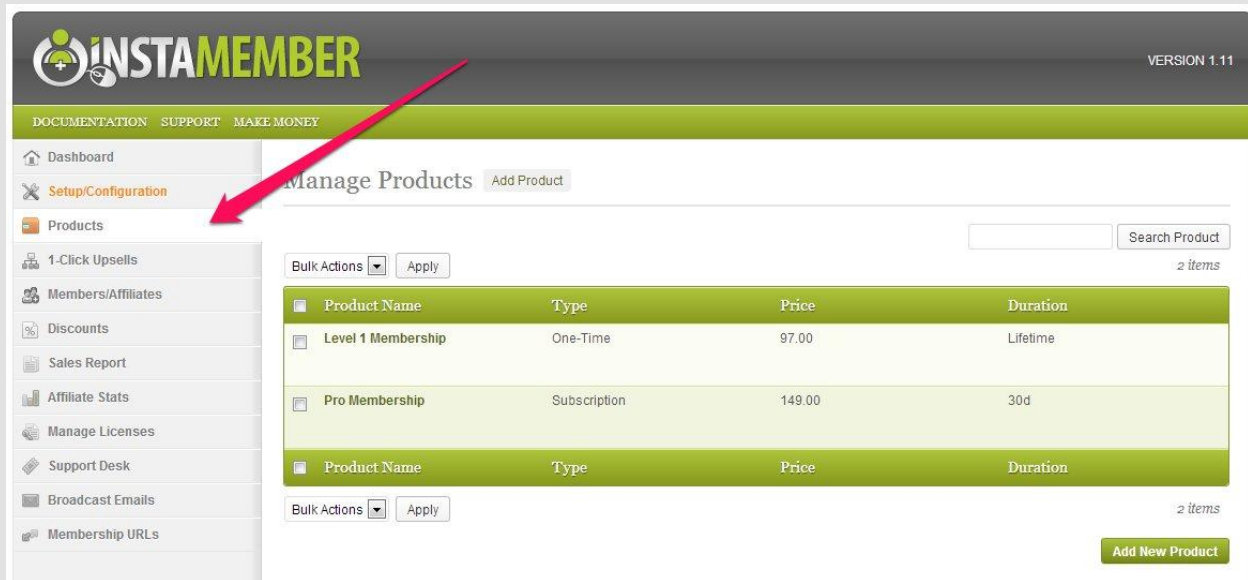
4. To delete a product's sales report, simply hover your cursor below the username and click delete. Or you can simply check the checkbox that corresponds to the member username you want to delete then from

the bulk actions dropdown select delete then hit apply to implement the action.

Delete

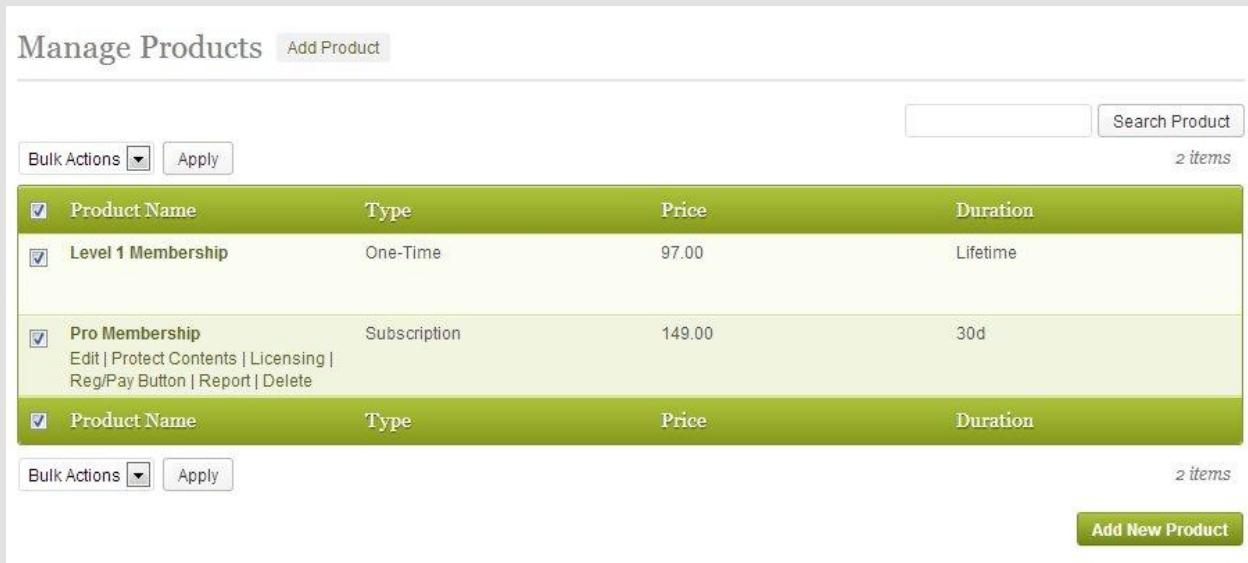
This option is applicable if you would like to delete a specific product.

1. To delete product(s), go to **Products** in your InstaMember page.



The screenshot shows the InstaMember dashboard with the 'Manage Products' page. The left sidebar contains a menu with 'Products' highlighted. A red arrow points to this menu item. The main content area shows a table of products with columns: Product Name, Type, Price, and Duration. There are two products listed: 'Level 1 Membership' (One-Time, 97.00, Lifetime) and 'Pro Membership' (Subscription, 149.00, 30d). Above the table is a 'Bulk Actions' dropdown and an 'Apply' button. A search bar is also present.

2. To delete multiple products at the same time, tick the checkbox just beside the product name of the product(s) you want to delete.

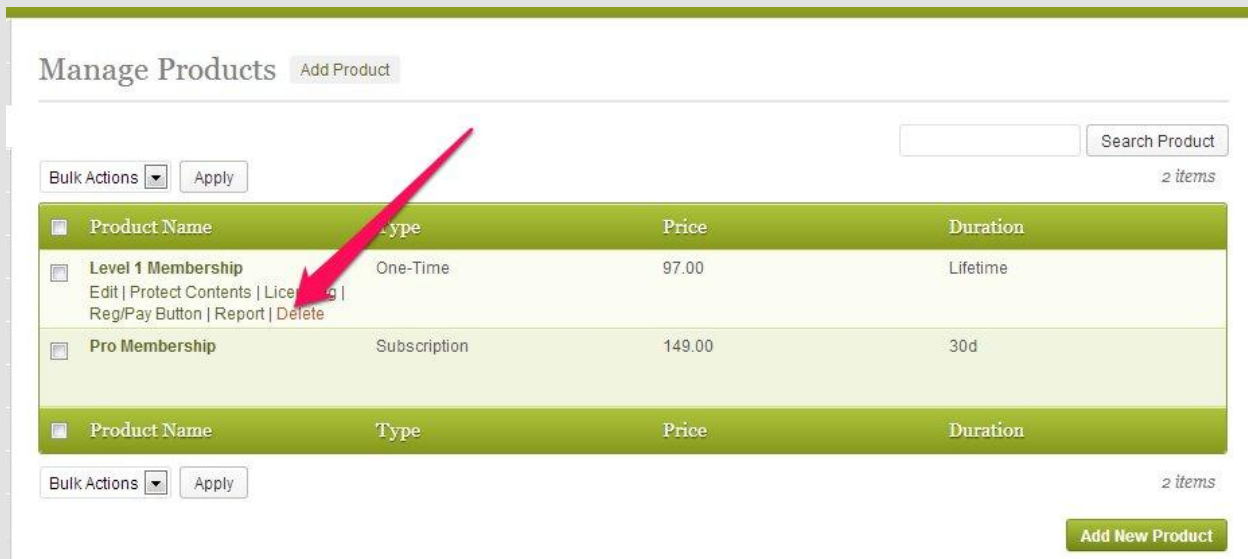


This screenshot shows the 'Manage Products' page with the checkboxes next to the product names selected. The table has columns: Product Name, Type, Price, and Duration. The products are 'Level 1 Membership' and 'Pro Membership'. Below the table, there is a 'Bulk Actions' dropdown and an 'Apply' button. A search bar is also present.

3. From the bulk actions dropdown, choose delete and click the **Apply** button.

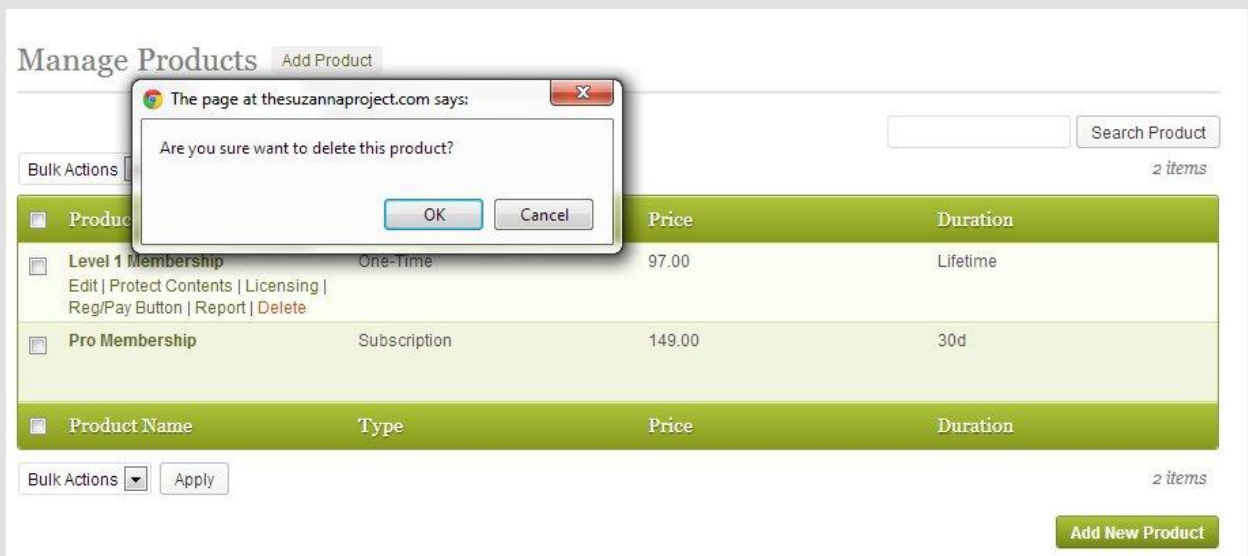
Note: This action is irreversible so you can make a backup of your site's database before proceeding.

4. Another way of deleting a product is to hover over your cursor below a products name to make the **Delete** option visible.



The screenshot shows the 'Manage Products' interface. At the top, there's a header with 'Manage Products' and an 'Add Product' button. Below this is a search bar with a 'Search Product' button and a '2 items' indicator. A 'Bulk Actions' dropdown menu is open, showing 'Apply' as the selected option. The main table has columns: Product Name, Type, Price, and Duration. It lists two products: 'Level 1 Membership' (One-Time, 97.00, Lifetime) and 'Pro Membership' (Subscription, 149.00, 30d). A red arrow points to the 'Delete' link in the actions column for 'Level 1 Membership'. At the bottom, there's another 'Bulk Actions' dropdown, an 'Apply' button, and an 'Add New Product' button.

5. Click **Delete**. A popup window will ask you to confirm the action. Click **OK** to proceed or **Cancel** if you would like to cancel the action.



The screenshot shows the 'Manage Products' interface with a confirmation dialog box overlaid. The dialog box has a title bar that says 'The page at thesuzannaproject.com says:' and a close button. The main text of the dialog box asks 'Are you sure want to delete this product?'. There are two buttons: 'OK' and 'Cancel'. The background interface is the same as the previous screenshot, showing the 'Manage Products' table and controls.

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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>