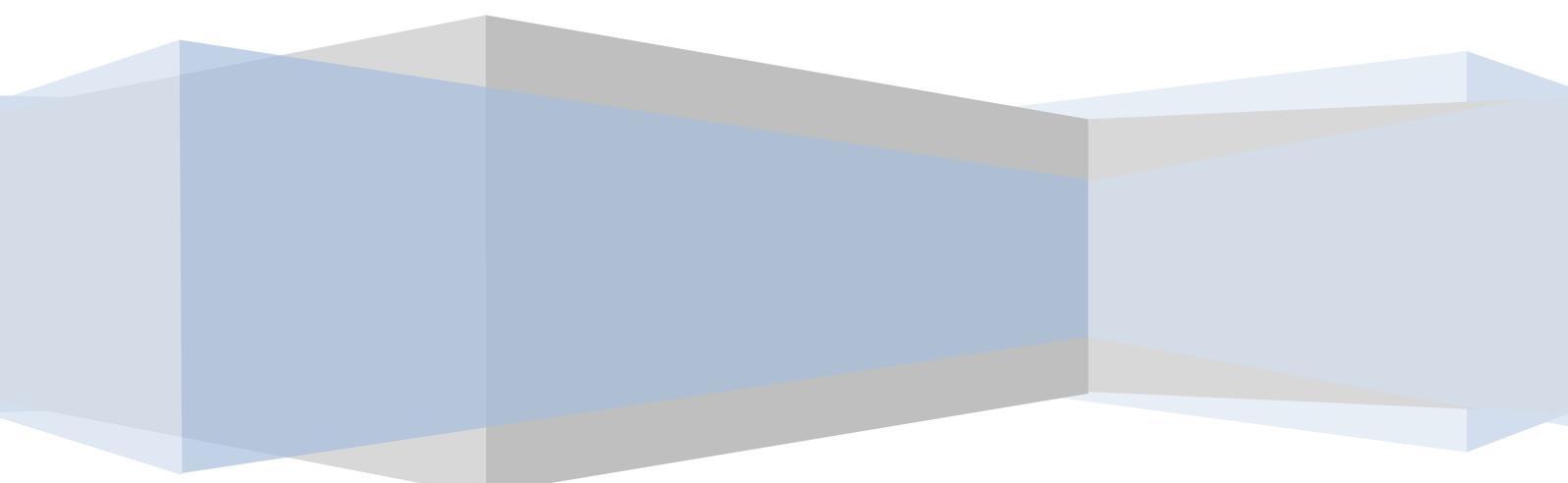




# Membership Add-on

(For WPL)

Realtyna Inc.



*Contents of this Manual are applicable to the WPL Membership Add-On. Details of this Manual may be different based on the customizations or software you have.*

# Introduction

This Manual contains information about the Membership Add-On, an extension for the WPL plugin.

The Membership Add-On is a powerful extension that enables real estate WordPress websites to manage subscription plans, user types, user fields and change default WordPress pages such as the login, register and forgot password pages.

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## System Requirements

To use the Membership Add-On, you will need WPL Pro. (Do not install any Add-On to WPL basic)

## Installation

If you have the Installation Package of the Membership Add-On, you can upload it from the following path: WordPress->WPL dashboard->Install Addon form.

## Glossary

Below are a list of terms and their meanings used throughout this manual.

**Membership:** A subscription plan for users. You can create as many various types of memberships as you like.

**User Type:** Three default user types will be created by installing the Membership Add-on: Agents, Owners and Guests. It defines the role of your website users. You can create new user types if needed. You can also create memberships for certain types of users.

**Dashboard:** WPL interface for logged in users. It will show after login.

## Manage Memberships

### Create a new Membership

To create a new membership subscription you can click on the '+' icon in WPL->Memberships menu.

## Memberships



ID	Name	Type	#Properties	#Featured	#Hot	Sort Memberships
-1	Default	Agents	Unlimited	Unlimited	Unlimited	
-2	Guest	Guests	0	0		
-4	Silver	Agents	15	3	5	
-6	Listhub	Agents	3	1		
-3	Bronze	Owners	10	2	3	
-5	Gold	Agents	20	5	8	

1. **Type:** Each Membership belongs to one User Type. Using the WPL Membership add-on, you can manage **User Types** as well. We will explain this later.
2. **Edit, Delete, Sort:** Using these icons you can easily manage your membership subscription plans.
3. **Systematic Memberships:** WPL uses **Guest membership** for visitor access (Not-logged in). Therefore, if you want to block the access of visitors to a single property page, you can do it via changing Guest Membership. **Default membership** uses registration if there is no membership specified.

By clicking on the + icon you will see the following figures:

The screenshot shows the 'Edit Membership' form with the following fields and callouts:

- Name:** Listhub (Callout: Membership Name)
- Type:** Agents (Callout: Membership type)
- Accesses:** A list of permissions with checkboxes, including Propertywizard, Profilewizard, Delete, Receive Notifications, Propertyshow, Confirm, Public Profile, Complex Addon, Propertylisting, Propertymanager, and Change User. (Callout: Accesses)

Buttons at the top right: Save, Save and update all members.

Left sidebar tabs: Basic, Advanced, Pricing, Descriptions.

1. **Name:** Enter membership name in this text-box.
2. **Type:** Select related User Type.
3. **Accesses:** Specify membership accesses. These accesses will apply to users that subscribed to this membership.

Edit Membership
✕

Save
Save and update all members

<div style="background-color: #f2f2f2; padding: 2px; text-align: center;">Basic</div> <div style="background-color: #e0e0e0; padding: 2px; text-align: center;">Advanced</div> <div style="padding: 2px; text-align: center;">Pricing</div> <div style="padding: 2px; text-align: center;">Descriptions</div>	<div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">             Total number of properties <input style="width: 100%;" type="text" value="5"/> </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;">             Total number of hot properties <input style="width: 100%;" type="text" value="3"/> </div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">             Total number of featured properties <input style="width: 100%;" type="text" value="2"/> </div> <div style="padding: 5px; margin-bottom: 5px;">             Register form <input style="width: 100%;" type="text" value="Show"/> </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;">             Listing Restriction (PWizard)? <input style="width: 100%;" type="text" value="No"/> </div> <div style="padding: 5px; margin-bottom: 5px;">             Property Type Restriction (PWizard)? <input style="width: 100%;" type="text" value="No"/> </div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">             Listing Restriction (PListing)? <input style="width: 100%;" type="text" value="Yes"/> </div> <div style="border: 1px solid #0070C0; padding: 5px; margin-bottom: 5px;"> <input style="width: 50%; border: none;" type="text" value="For sale ✕"/> <input style="width: 50%; border: none;" type="text" value="For Rent ✕"/> </div> <div style="padding: 5px; margin-bottom: 5px;">             Property Type Restriction (PListing)? <input style="width: 100%;" type="text" value="No"/> </div> <div style="background-color: #e0e0e0; padding: 5px; margin-bottom: 5px;">             Listing Restriction (PShow)? <input style="width: 100%;" type="text" value="No"/> </div> <div style="padding: 5px; margin-bottom: 5px;">             Property Type Restriction (PShow)? <input style="width: 100%;" type="text" value="No"/> </div> <div style="background-color: #f2f2f2; padding: 5px; margin-bottom: 5px;">             Receive Contact Emails Directly <input style="width: 100%;" type="text" value="No"/> </div> <div style="padding: 5px;">             Substitute Recipient <input style="width: 100%;" type="text" value="Steve"/> </div>
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1. **Membership's Limits:** Specify membership's limits. You can insert -1 for unlimited.
2. **Register Form:** Show on register form or not.
3. **Listing Restriction (PWizard):** Limit users to add properties in restricted listing types.
4. **Property Type Restriction (PWizard):** Limit users to add properties in restricted property types.
5. **Listing Restriction (PListing):** Limit users to see properties in restricted listing types, in property listing page.
6. **Property Type Restriction (PListing):** Limit users to see properties in restricted property types, in property listing page.
7. **Listing Restriction (PShow):** Limit users to see properties in restricted listing types, in property show page.
8. **Property Type Restriction (PShow):** Limit users to see properties in restricted property types, in property show page.

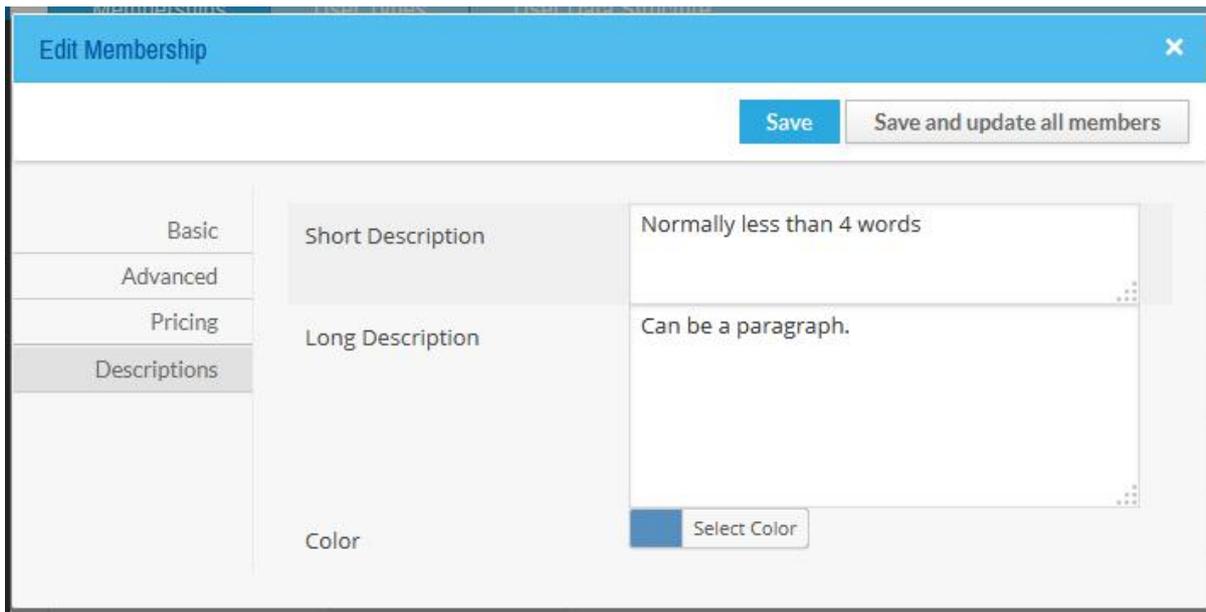
9. **Receive Contact Emails Directly:** Whether to receive contact emails (from general forms like Contact Agent, Request a Visit, etc.) directly or send those emails to another agent instead.
10. **Substitute Recipient:** If above option is set to No, you can choose a substitute agent to send the contact emails to them.

Edit Membership
✕

Save
Save and update all members

Basic	Subscription Price	0	\$ ▼
Advanced	<i>0 means free!</i>		
Pricing	Subscription Period	30	Days
Descriptions	<i>-1 means unlimited.</i>		
	Can Renew?	Yes ▼	
	Renew Price	20	\$ ▼
	Can Change Membership?	Yes ▼	
	Change Membership to	<input type="text" value="All ✕"/>	
	Recurring Payment?	Yes ▼	

1. **Subscription Price:** 0 means free.
2. **Subscription Period:** -1 means unlimited period.
3. **Can Renew:** Whether or not Membership users are allowed to renew their subscription. If they're allowed, you can set the renewal price for the membership. The renewal price can be different than the subscription price.
4. **Can Change Membership:** Set ability for changing the membership subscription for users and specify allowed memberships.
5. **Recurring Payment:** Whether or not the payment is recurring.



1. **Short/Long Description:** These fields will show on the Membership list page in the frontend while a new user is registering or a current user is trying to change their membership.
2. **Color:** Specify membership box or membership name color on Membership list page or change membership view.

**Note:** You may see more tabs on this view if you installed specific add-ons such as CRM.

After setting membership settings, you can click on the "Save" button on the top of the page to save the membership. If you're editing a membership you will see 2 buttons: "Save" and "Save and update all members".

By clicking on the "Save and update all members" button, WPL saves the membership and updates all subscribed users as well; Therefore, if you don't want to update users, you shouldn't click this button.

### **Different membership subscription scenarios**

The WPL membership add-on can cover many subscription scenarios. You can create a free membership for non-agent users or create a trial membership for agents by setting the subscription price to 0 and the renewal price to \$20.00.

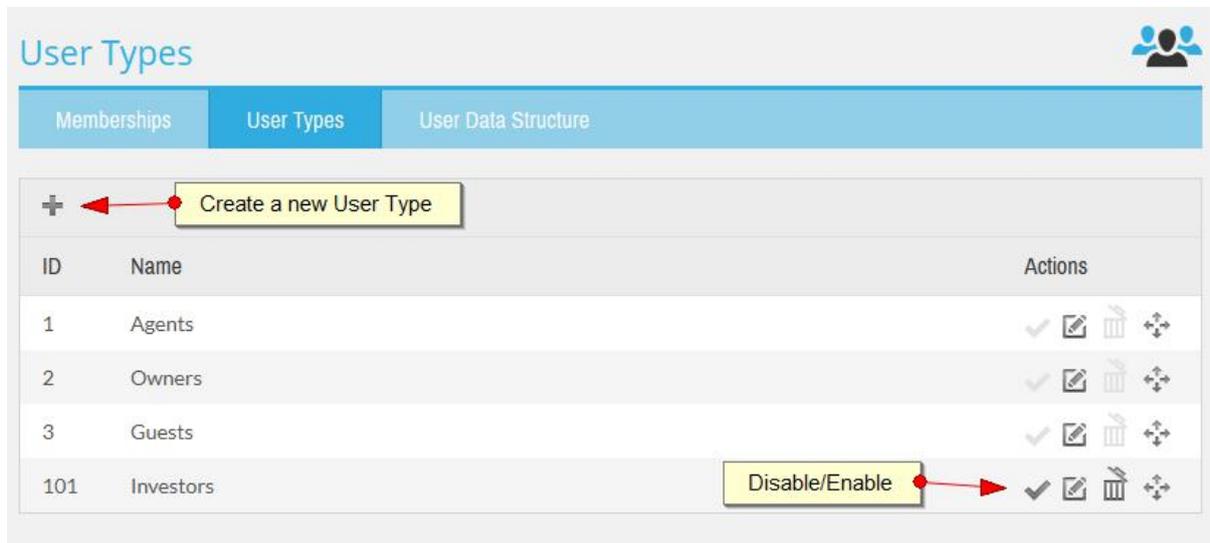
You can create a non-renewable membership and force users to change their membership after finishing a subscription period.

You can create an unlimited membership in property limitation and subscription period, as well as many other business plans, by combining WPL Membership features together.

# Manage User Types

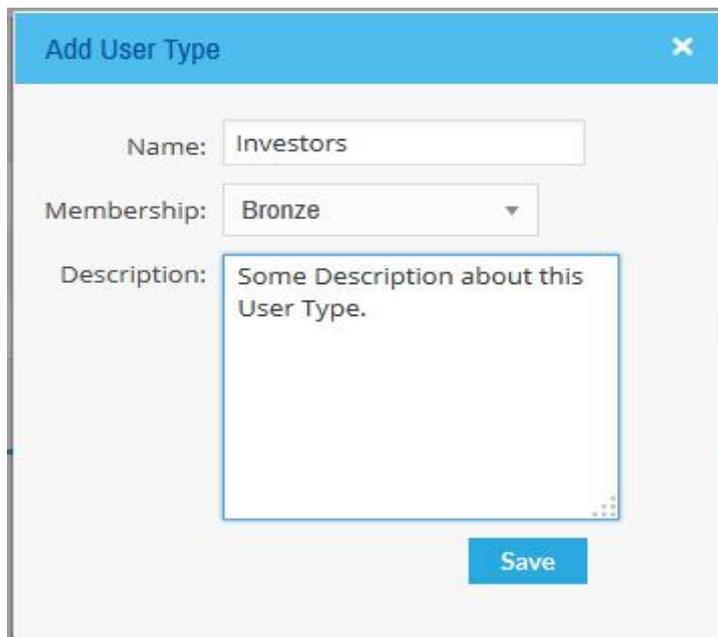
## Create a new user type

To create a new **User Type** you can click on the '+' icon in WPL->Memberships->User Types menu.



1. **Default User Types:** After installing the Membership add-on you will see 'Agents', 'Owners' and 'Guests' user types in this menu. These are default user types. You cannot delete or disable them.

By clicking on the '+' icon, you will see the following figure:



1. **Membership:** This is the default membership of this User Type. This membership can be used when a visitor selects his/her User Type and registers on your website without selecting the membership package. (It

depends on your registration scenario - You may use this method or force users to select a membership subscription before registering).

2. **Description:** It will show on the User Type list page.

# Membership Settings

Go to WPL->Settings->Membership to see Membership configuration options.

- 2. **User URLs:** Change WordPress default user URLs to WPL Membership URLs. For example, it converts <http://example.com/wp-login.php> to <http://example.com/properties/v/members/?wplmethod=login> with a new design. By selecting "WPL URLs", your website visitors won't see the classic WordPress page anymore.
- 3. **Auto Redirection:** Redirect users to referred page after login/logout.

- 4. **Expiration Notice Days: The** Membership add-on sends an expiration notification to users before expiring their subscriptions. You can set the days. By default, the membership add-on sends this notification 7 days before, and again 1 day before expiring but you can change it to 7,3,1 or 14,7,3,1 if you like.
- 5. **Register Link Type:** The WPL Membership add-on supports many types of registration.
  - a. **Register:** Redirects visitors to the registration page directly. If you select this option, your website visitors can only register for the default membership with the related User Type. This method is fast and simple for small websites.

 New user registration

You're registering as **Agents** in **Default** membership.

### Account Info

Username: \*

Email: \*

First Name:

Last Name:

[Register](#)

- b. **User Types->Register:** Redirects visitors to the User Types page so they can select their User Type and register on the default membership of the selected User Type.

### User Types

			
Guests	Agents	Owners	Constructors
<a href="#" style="background-color: #007bff; color: white; padding: 5px 15px; text-decoration: none;">Register</a>	<a href="#" style="background-color: #007bff; color: white; padding: 5px 15px; text-decoration: none;">Register</a>	<a href="#" style="background-color: #007bff; color: white; padding: 5px 15px; text-decoration: none;">Register</a>	<a href="#" style="background-color: #007bff; color: white; padding: 5px 15px; text-decoration: none;">Register</a>

- c. **Memberships->Register:** Redirects visitors to the membership page so they can select their desired membership and register. Their User Type will be related to the User Type of the selected membership.



- d. **User Types->Memberships->Register:** This is the most complete registration scenario. It redirects visitors to the User Type page so they can select their user type and then redirects them to the Membership page. The Membership page only shows the memberships that are related to the User Type selected in the first step. After selecting membership by visitors, they are redirected to the registration page to complete the signup process.
6. **Register Form Type:** You can choose between three different options for registration form: Normal, Compact and Full.
  7. **Agreement:** You can enable the agreement option for the registration page if needed. It supports 3 different types and you can select one of them based on your need.

### Facebook Login

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App ID :

App Secret :

### Details Page Login/Registration

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Status :

Mandatory :

Allowed Visits :

Criteria :

[Save Criterias](#)

8. **Facebook Login:** In order to enable Facebook Login feature, You should first create an App in your Facebook account and then add the App ID and App Secret of that app in here. In frontend, the Login with Facebook and Sign-up with Facebook options will appear in Login and Sign-up pages respectively.
9. **Details Page Login/Registration:** By enabling this option you can force users to sign-up and login to your site in order to continue visiting properties. The Allowed Visits option indicates that how many properties the guest user is allowed to visit before forcing them to login. The Mandatory option is used to make the registration/login either mandatory or optional. The Mandatory Popup will display a pop-up instead of redirecting user to registration page. The Criteria option can be also used to define a certain criteria for properties so that only visiting certain kind of properties will make users sign-up/login (and not all of them).

## Membership Notifications

The WPL Membership add-on has a couple of notifications. It uses these notifications for completing user actions or notifying users about something. You can find them on WPL->Notifications menu.

## Notifications

#	Subject	Description	Actions
1	<a href="#">Request more details</a>	Sending users favorite list to agents email	✓
2	<a href="#">New Contact</a>	Contact to listing agent from listing page	✓
3	<a href="#">New Profile Contact</a>	Contact to agent from profile page	✓
101	<a href="#">Reset Password Request</a>	Sends after sending a forgot password request.	✓
102	<a href="#">Password Reset</a>	Sends after resetting password by user.	✓
103	<a href="#">Your Account has been registered.</a>	Sends after registration process.	✓
104	<a href="#">Your WPL membership changed.</a>	Sends after changing user membership.	✓
105	<a href="#">Your membership subscription renewed.</a>	Sends after renewing user membership.	✓
106	<a href="#">Your membership expired.</a>	Sends after expiring user membership.	✓
107	<a href="#">Your membership is about to expire.</a>	Sends before expiring membership subscription.	✓

1. **Reset Password Request:** It is sent after someone uses the 'forgot password' feature to retrieve the password.
2. **Password Reset:** It is sent after the 'reset password' action is used and sends new password to the user's email.
3. **Your Account has been registered:** It calls after registration and sends the username and password of the new user to the selected email during the registration process.
4. **Your WPL Membership changed:** It calls after changing the user membership to notify them about it.
5. **Your membership subscription renewed:** It calls after the user renews the subscription.
6. **Your membership expired:** Calls after the user's subscription has expired.
7. **Your membership is about to expire:** Calls before the subscription of the user expires and notifies them to renew their subscription.

## Membership Activities

By default, the WPL Membership add-on has 1 activity with 3 instances after installation. You can find these instances by searching "Membership" on WPL->Activity Manager menu.

## Activity Manager

ID	Title	Activity	Layout	Position	Actions
28	Membership	membership		my_profile_top	✓ ✎ 🗑️ ↻
30	Membership Info	membership		dashboard_bottom	✓ ✎ 🗑️ ↻
31	Dashboard Menu	membership	links	dashboard_side	✓ ✎ 🗑️ ↻
ID	Title	Activity	Layout	Position	Actions

1. **#28:** This activity includes on My Profile menu of WPL in the backend. Agents will see their subscription details and they can renew and change their subscription if they are allowed. You should set the "Site Section" of this activity to "Backend" otherwise it loads on the frontend profile menu as well.
2. **#30:** It's the same activity as above, but it includes the Membership Dashboard page in the frontend.
3. **#31:** This activity creates the Dashboard menu and you shouldn't disable it. This activity layout should be **links**.

**Note:** Don't delete or deactivate these activities if you're not sure about what you're doing.

You can define membership-based restrictions to all Activities using the "Viewable by" option in Modify Activity pop-up, as depicted below:

CRM

Adding Price Request

**Page Association**

Association

**Accesses**

Viewable by

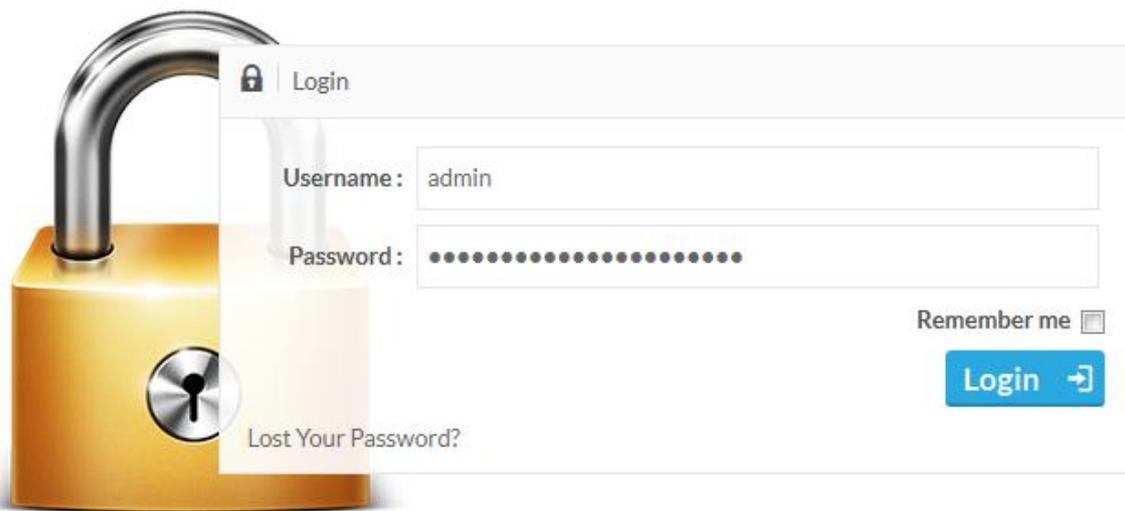
- Gold
- Silver
- Bronze
- Guest
- Default

# Membership Views

You have seen User Types, Memberships and Register pages already, but the WPL Membership has some other views.

## Login

If you select "WPL URLs" for "User URLs" in Membership settings, your users will see this page instead of the normal WordPress login page when they try to login to your website:



Login

Username: admin

Password: .....

Remember me

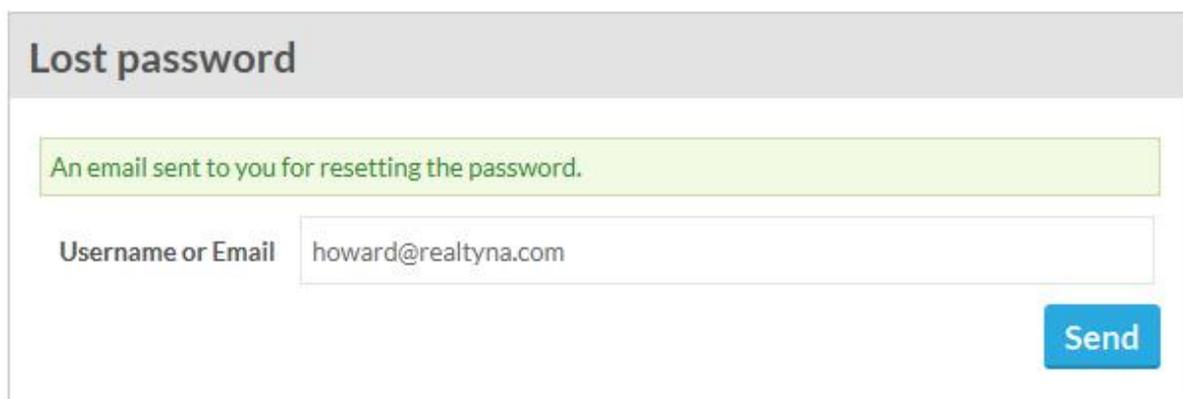
Login →

Lost Your Password?

**Note:** This page interface may be different based on your theme, and this page is as is - we do not support other third party plugins integration.

## Forgot Password

Using this feature, your users can retrieve their password if they have forgotten it. By clicking on the "Lost Your Password" link on the login page, they will be redirected to this page:



Lost password

An email sent to you for resetting the password.

Username or Email howard@realtyna.com

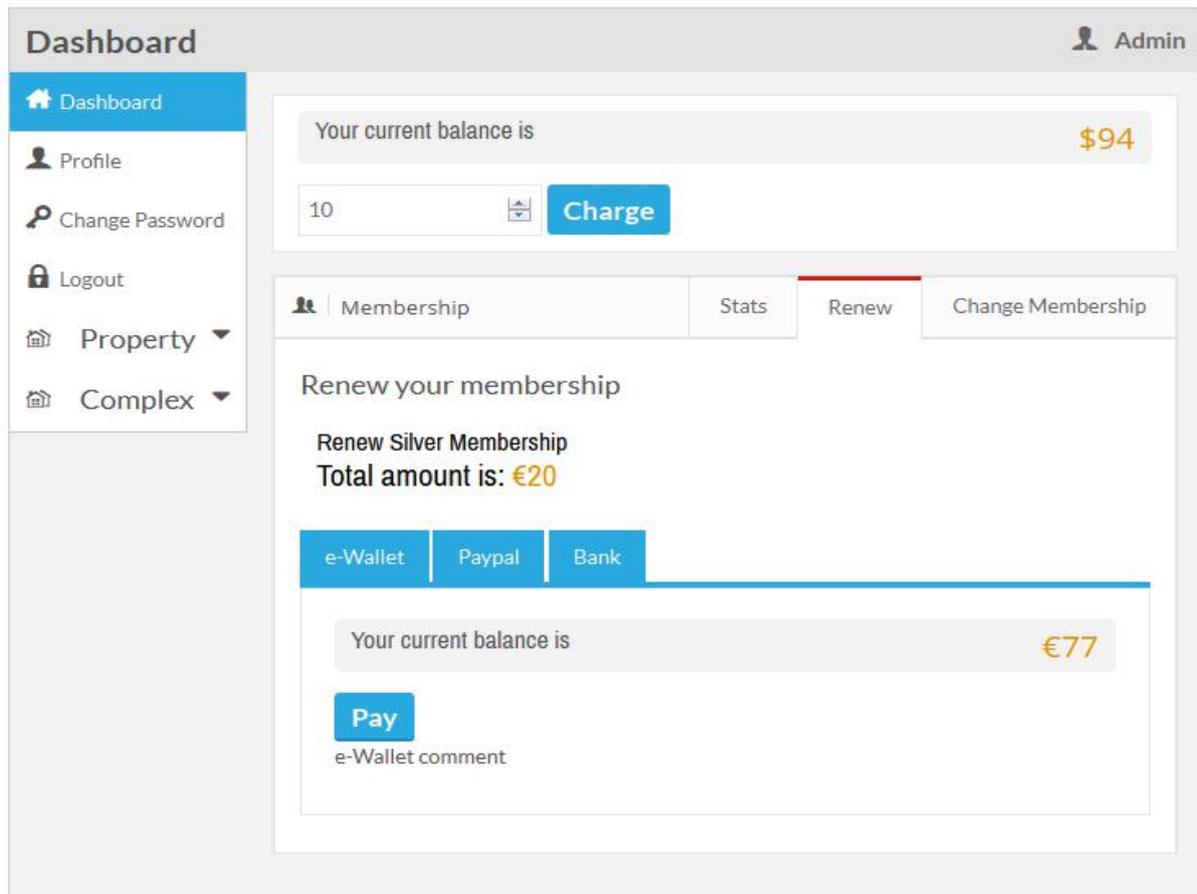
Send

After submitting their username or email, they will receive an email confirming their request. By clicking on the confirmation link, they can select a new password for their account.

## Dashboard

After logging in to the account, the user will see the dashboard page:

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In this page, users can charge their e-wallet, see membership details, renew memberships, change memberships, update their profile, change their password and add/manage properties/complexes etc.

## Profile

By clicking on the profile menu, users have the opportunity to update their WPL profiles:

**Profile**

Dashboard

Profile

Change Password

Logout

Property

Complex

Profile

First Name\* Howard

Last Name\* R.

Gender Male

Country United States

State Alabama

County

City

Division

### Change Password

Users can change their password using this menu:

**Change password** Admin

Dashboard

Profile

Change Password

Logout

Property

Complex

New Password: ●●●●●●

Repeat Password:

Change

## Membership links

As we explained before, WPL has its own registration process, but if you would like to create a price table or create menus for registration or membership pages, you can easily do it via the Membership links structure.

### Register page

Its default URL is something like this:

<http://example.com/properties/v/members/?wplmethod=register>, but you can pass a specific User Type or specific Membership to this page.

Pass a specific Membership subscription:

<http://example.com/properties/v/members/?wplmethod=register&membership=-5>

Pass a specific User Type:

<http://example.com/properties/v/members/?wplmethod=register&type=2>

Using these links, you can create menus that will redirect users to proper registration pages or use third party price table extensions to create price tables and link each package to its registration page easily.

### Membership page

Like the register page, the membership page has its own link structure and you can use it if needed. The default URL is something like this:

<http://example.com/properties/v/members/?wplmethod=memberships> but you can pass a specific User Type to this page for showing specific User Type memberships.

Pass a specific User Type:

<http://example.com/properties/v/members/?wplmethod=memberships&type=2>

## FAQ

### 1– **What happens if a user's subscription expires?**

User properties won't show on listing pages and search results. Also, the user themselves won't show on the profile listings page or profile search results.

### 2– **What if an expired user renews their membership after it expires?**

Their properties will show on the listing pages again and their user profile will show on profile listing pages.

### 3– **What happens if a user renews their membership before its expiry?**

New subscription time will be added to the remaining time. For example, if the user's subscription expires in 10 days and they renew their subscription for 30 more days, their subscription will expire 40 days later.