



PINXS Member Manager

Full Install, Setup and User Instructions

Version 1.0.23 | Plugin Nexus

Thank you from Mike Edmonston

Thank you for choosing a Plugin Nexus product. This guide has been prepared to help you install, licence, configure and operate PINXS Member Manager with confidence. It covers free and paid memberships, protected content, digital downloads, Stripe, PayPal, customer account pages, reporting, email settings and the shortcode system used to build customer-facing pages.

Website

https://pluginnexus.com

Product

PINXS Member Manager for WordPress

Document type

Install, setup, admin and customer workflow guide

Audience

WordPress administrators, membership site owners, digital product sellers and web designers

Important user responsibility

Always keep a current backup before installing or updating WordPress themes, plugins or custom code. Test payment gateways, webhook events, email delivery and protected content on a staging site before using the plugin on a live customer website.



Contents

This guide is intentionally detailed. Use it as a full customer setup manual and as a checklist when building a new membership website or adding paid member areas to an existing WordPress site.

- 1. Overview and what the plugin is for
- 2. Requirements, compatibility and preparation
- 3. Licence activation and update access
- 4. Installation and first checks
- 5. Admin menu overview
- 6. Recommended setup order
- 7. General settings and payment method controls
- 8. Membership levels and member roles
- 9. Stripe setup and webhook configuration
- 10. PayPal setup and webhook configuration
- 11. Test/setup mode and safe testing
- 12. Customer page structure and required pages
- 13. Signup forms, checkout buttons and payment buttons
- 14. Managing members in WordPress admin
- 15. Customer accounts and member profile tools
- 16. Content protection and member-only areas
- 17. Download manager and protected digital files
- 18. Separate sales and buy buttons for individual downloads
- 19. Download categories and catalogue organisation
- 20. Email templates, SMTP and test emails
- 21. Reports and performance monitoring
- 22. Elementor widgets and page builder usage
- 23. Styling, default product images and theme integration
- 24. Income and expenses integration
- 25. Shortcode quick reference
- 26. Payment flow checklists
- 27. Security, backups and GDPR-style operational notes
- 28. Troubleshooting
- 29. Frequently asked questions
- 30. Final pre-launch checklist



1. Overview and what the plugin is for

PINXS Member Manager is a Plugin Nexus WordPress membership plugin for building free and paid member areas, protected content libraries, protected downloads, subscription pages, customer account pages and digital product sales workflows. It is designed to keep the core membership workflow inside WordPress while connecting to Stripe and PayPal for payments where required.

Free and paid memberships Create a permanent free level plus paid membership tiers with their own descriptions, prices and payment provider IDs.	Stripe and PayPal support Use Stripe/card payments, PayPal subscription payments, or both. Webhooks keep membership status aligned with payment events.
Protected content Protect pages, posts, page sections or shortcode-wrapped content so only the right members can see it.	Digital downloads Create protected downloadable files, organise them into categories and allow members to access the correct files.
Customer account pages Give members a front-end account area for profile information, subscription details, downloads and purchase history.	Reports and admin tools Review member counts, payment providers, downloads, top downloads and operational data from the WordPress admin area.
Internal naming note Some internal code, options and shortcodes use the historical FMM prefix for compatibility. In customer-facing documentation and product branding, the product is PINXS Member Manager from Plugin Nexus.	



2. Requirements, compatibility and preparation

Before installation, check that the target site can support a membership and payment workflow. A membership site is more sensitive than a normal brochure site because login, payments, emails, protected content and downloads all need to work together.

Requirement	Recommendation
WordPress	WordPress 5.0 or newer. A current maintained WordPress version is recommended.
PHP	PHP 7.4 or newer. PHP 8.1+ is recommended for current WordPress hosting.
HTTPS	Required for safe customer logins and strongly recommended for all payment flows.
User accounts	The site must allow WordPress user accounts for member access.
Email delivery	Use a reliable SMTP provider or transactional email service for welcome emails, notifications and password/account messages.
Payments	Stripe and/or PayPal accounts are needed for paid memberships. Test credentials are recommended before live launch.
Backups	Back up the database and uploads directory before installing, updating or changing payment settings.
Staging site	Recommended for testing memberships, protected pages, webhooks and emails before live release.

Preparation checklist

- Decide which membership levels you need and what each level should include.
- Plan the pages you need: pricing/signup, success, cancellation, account, downloads and protected content pages.
- Create Stripe products/prices and/or PayPal plans before configuring paid levels.
- Choose the email address and sender name used for membership emails.
- Prepare any download files and thumbnails before building a public download catalogue.
- Decide whether protected content should be hidden, replaced with a message or promoted with a signup link.



3. Licence activation and update access

The retail version of PINXS Member Manager includes the Plugin Nexus licensing runtime. A valid licence is required before the main membership features are available. Your licence is normally supplied in your Plugin Nexus customer account and in your licence email.

Item	What it means
Licence key	Unique key issued for your purchase. Keep it private.
Licence email	The email address associated with the licence purchase.
Site activation	Links the licence to the current WordPress installation.
Updates	Access to updates is governed by the update period supplied with the purchase.
Support	Support is provided according to the Plugin Nexus licence/support terms.

1. Install and activate the plugin ZIP.
2. Open the licence activation screen if prompted.
3. Enter the licence key exactly as supplied.
4. Enter the matching licence email.
5. Activate and wait for the success message.
6. Refresh WordPress admin and confirm the PINXS Members menu is available.

Activation troubleshooting

If activation fails, check for typing errors, confirm the licence email matches the purchase, confirm the site can connect to Plugin Nexus and check whether the licence has reached its allowed activation limit.



4. Installation and first checks

Installing from WordPress admin

7. Sign in to WordPress admin as an administrator.
8. Go to Plugins > Add New.
9. Select Upload Plugin.
10. Choose the supplied PINXS Member Manager ZIP file.
11. Select Install Now.
12. When WordPress finishes installing, select Activate.
13. Complete licence activation if prompted.

First checks after activation

Check	Expected result
Plugins page	PINXS Membership Manager / PINXS Member Manager appears as active.
Admin menu	A PINXS Members menu appears in WordPress admin.
Settings page	PINXS Members > Settings opens and loads the tabbed settings interface.
Downloads	A Downloads area is available for protected digital files.
Reports	Reports page opens without PHP or JavaScript errors.
Shortcodes	Shortcodes render on front-end pages rather than displaying as plain text.

Do not rename plugin folders manually

When updating the plugin, keep the supplied ZIP structure intact. WordPress should update the existing plugin when the package structure is preserved. Do not manually rename folders or merge files unless Plugin Nexus support asks you to do so.



5. Admin menu overview

The main admin area is grouped under PINXS Members. Some helper pages may appear depending on plugin configuration, installed integrations and user permissions.

Menu item	Purpose
All Members	Main member administration screen. View, add, edit, filter, email and manage member records.
Downloads	Manage protected downloadable files, product cards, access levels, categories and separate sales settings.
Reports	Review member statistics, payment provider summaries, download statistics and top downloads.
Settings	Configure payment gateways, membership levels, styling, SMTP/email settings and integration options.
Email Templates	Review and edit membership-related email templates and send template test messages.
Payment Gateways	Classic fallback page for selecting Stripe and PayPal and storing gateway credentials if the React settings interface is cached or unavailable.

Permissions

Only trusted administrators should change payment settings, membership levels, webhooks, email templates and protected downloads. Do not give public demo users the ability to add, edit, delete or upload membership content.



6. Recommended setup order

Membership sites are easiest to configure when the foundation is built in a sensible order. This prevents pages being created before levels, buttons being added before payment IDs and members joining before email delivery is ready.

14. Install, activate and licence the plugin.
15. Enable test/setup mode while building the site.
16. Configure general payment method availability.
17. Create or confirm the free membership level.
18. Create paid membership levels and add descriptions and prices.
19. Create Stripe products/prices and PayPal plans for each paid level.
20. Configure Stripe and/or PayPal credentials and webhook endpoints.
21. Configure email sender settings and SMTP if needed.
22. Create the required customer pages and add the relevant shortcodes.
23. Create protected pages, downloads and member-only content.
24. Run test signups for free, Stripe and PayPal flows.
25. Review member records, reports, emails, webhooks and front-end access.
26. Turn off public test/setup mode before launch.
27. Run final live payment tests with low-value products or controlled test accounts.

Build in test mode first

Do not open a paid membership system to the public until you have tested signup, payment completion, failed payment behaviour, cancellation, protected content, downloads, emails and member account pages.



7. General settings and payment method controls

Open PINXS Members > Settings > General to control the broad behaviour of payment options, testing and integrations.

Setting	What it controls	Recommended use
Enable test/setup mode	Allows paid memberships to be created without Stripe or PayPal payment.	Use only while building or testing. Turn off before live launch.
Who can use test signups	Controls whether only administrators or public visitors can use test signups.	Use Administrators only unless working on a private staging site.
Enable Stripe / card payments	Shows Stripe checkout options and processes Stripe/card payment flows.	Enable when Stripe is configured and at least one paid level has a Stripe price/product ID.
Enable PayPal payments	Shows PayPal subscription options and processes PayPal webhook events.	Enable when PayPal credentials and plan IDs are configured.
Fallback membership level	Membership role used when a subscription fails, cancels or needs to fall back.	Usually Free Member. Choose carefully if you have special retention workflows.
Income-Expenses integration	Allows the plugin to send transaction data to the PINXS Income & Expenses plugin.	Enable only when that plugin is installed, configured and tested.

Payment method strategy

- Stripe is usually best for card payments and subscription checkout.
- PayPal is useful for customers who prefer PayPal accounts or PayPal subscription billing.
- Both can be enabled if you want customers to choose.
- Each paid level needs matching payment provider IDs before provider-specific buttons will work reliably.



8. Membership levels and member roles

Membership levels define what customers can join and what protected content or downloads they can access. Level 0 is reserved for the free membership level. Paid levels are added after the free level.

Field / option	Meaning
Free Membership	Reserved level 0. This level always bypasses payment and uses price 0.
Level Name	Customer-facing and admin-facing name of the level, such as Pro, Premium or Unlimited.
Description	Short explanation of what the level includes. Used on signup and button displays where supported.
Price	Monthly subscription price shown in the configured currency.
Stripe Price/Product ID	Stripe price_xxx or prod_xxx value used for Stripe checkout.
PayPal Plan ID	PayPal plan ID used for PayPal subscription buttons.
Delete Level	Removes a paid level. If members exist in that level, choose a migration target before confirming.
Role generation	The plugin creates/uses WordPress roles based on membership levels, such as free member or paid level member roles.

Creating a paid level

28. Open PINXS Members > Settings > Membership Levels.
29. Confirm the free level exists as level 0.
30. Select Add Level.
31. Enter a clear level name.
32. Add a concise benefit-led description.
33. Enter the subscription price in the configured payment currency.
34. Add the Stripe Price/Product ID if using Stripe.
35. Add the PayPal Plan ID if using PayPal.
36. Save Settings.
37. Create or update signup buttons/pages that reference the new level.

Deleting levels with members

When deleting a level that already has members, migrate those members to another level. This prevents users from being left without a meaningful membership role.



9. Stripe setup and webhook configuration

Stripe setup connects PINXS Member Manager to card payments and Stripe subscription events. Use test mode first, then switch to live keys when testing is complete.

Stripe option	Description
Stripe Test Mode	Switches between test credentials and live credentials. Use test mode during setup.
Stripe Currency	Currency used for Stripe payments, such as GBP, USD or EUR. Your Stripe account and prices must support this currency.
Test Secret Key	Stripe test secret key, usually starting with sk_test_.
Test Publishable Key	Stripe test publishable key, usually starting with pk_test_.
Live Secret Key	Stripe live secret key, usually starting with sk_live_. Keep private.
Live Publishable Key	Stripe live publishable key, usually starting with pk_live_.
Verify Stripe Credentials	Checks whether the saved Stripe credentials can be used.
Webhook Secret	Secret copied from the Stripe webhook endpoint settings. Use the matching test or live webhook secret.

Stripe webhook endpoint

Create a Stripe webhook endpoint pointing to this URL, replacing your-domain.co.uk with the live site domain:

Stripe webhook URL

`https://your-domain.co.uk/wp-json/fmm/v1/stripe-webhook`

- Recommended Stripe events: checkout.session.completed, customer.subscription.updated, customer.subscription.deleted and invoice.payment_failed.
- Some setups may also use customer.subscription.created depending on the Stripe product flow.
- Use the test webhook secret while Stripe test mode is enabled and the live webhook secret when the site goes live.

Stripe level setup

38. Create a product and recurring price in Stripe.
39. Copy the Stripe Price ID, usually price_XXX. If your setup uses product IDs, copy the product ID as required.
40. Paste the ID into the matching membership level in PINXS Members > Settings > Membership Levels.
41. Save settings.
42. Use a Stripe checkout shortcode or provider-neutral checkout button for that level.
43. Complete a test payment and confirm the WordPress user receives the correct membership level.



10. PayPal setup and webhook configuration

PayPal setup allows customers to subscribe with PayPal. PayPal needs API credentials, a webhook and a plan ID for each paid membership level that should offer PayPal.

PayPal option	Description
PayPal Sandbox Mode	Use sandbox credentials and sandbox plans while testing.
PayPal Client ID	REST app client ID from the PayPal Developer Dashboard.
PayPal Secret	REST app secret. Keep private.
PayPal Webhook ID	Webhook ID used to validate PayPal subscription events.
PayPal Currency	Three-letter currency code, for example GBP or USD.
Verify PayPal Credentials	Checks whether the saved PayPal credentials can be used.
PayPal Plan ID per level	Each paid level needs a PayPal plan ID if you want PayPal buttons to show for that level.

PayPal webhook endpoint

PayPal webhook URL

`https://your-domain.co.uk/wp-json/fmm/v1/paypal-webhook`

- Recommended PayPal events include BILLING.SUBSCRIPTION.ACTIVATED, BILLING.SUBSCRIPTION.CANCELLED, BILLING.SUBSCRIPTION.EXPIRED, BILLING.SUBSCRIPTION.PAYMENT.FAILED and PAYMENT.SALE.DENIED.
- Use sandbox credentials and sandbox plans for testing.
- Use live credentials and live plans only when ready to accept real customers.

PayPal level setup

44. Create a PayPal product and subscription plan in the PayPal Developer/Dashboard tools.
45. Copy the PayPal Plan ID, normally starting with P-.
46. Open PINXS Members > Settings > Membership Levels.
47. Paste the plan ID into the PayPal Plan ID field for the matching paid level.
48. Save settings.
49. Test the PayPal subscription button and confirm the WordPress member role is applied.



11. Test/setup mode and safe testing

Test/setup mode is useful while building the site because it can simulate paid membership creation without contacting Stripe or PayPal. This helps you test protected pages, downloads, account pages and membership roles before payment gateways are ready.

Option	Safe usage
Administrators only	Recommended for most testing. Only admins can create test memberships without payment.
Public visitors	Only use on a private staging site. Public mode can grant paid memberships without payment.
Test memberships	Use clearly named test accounts so they can be identified and removed later.
Before launch	Disable public test/setup behaviour before announcing or advertising the membership site.

Critical launch warning

Do not leave public test/setup mode enabled on a live site. It can allow visitors to receive paid membership access without paying.

Suggested test accounts

- Free member test account.
- Stripe paid member test account.
- PayPal paid member test account.
- Cancelled member or fallback member test account.
- Non-member visitor test using a private/incognito browser window.



12. Customer page structure and required pages

The plugin uses shortcodes to build the customer-facing membership system. Create normal WordPress pages and insert the appropriate shortcode for each purpose.

Page	Recommended shortcode	Purpose
Membership / Pricing page	[fmm_checkout] or payment buttons	Shows plans and signup options for free and paid levels.
Free signup page	[fmm_free_signup] or [fmm_free_signup_page]	Allows customers to join the free level.
Success page	[fmm_member_success]	Displays membership success details after checkout.
Free member success page	[fmm_free_member_success]	Welcomes free members after signup.
Cancellation page	[fmm_member_cancel] or [fmm_cancellation_page]	Shows cancellation information when checkout is cancelled.
Account page	[fmm_account_page]	Main member dashboard for profile, subscription and purchases.
Customer portal page	[fmm_customer_portal]	Allows paid customers to manage billing through the payment provider where supported.
Download success page	[fmm_download_success]	Handles post-purchase download success flow for individual downloads.

Page setup advice

- Use clear page titles such as Membership, My Account, Downloads and Thank You.
- Keep required shortcodes on their own line or in a dedicated Shortcode block.
- Do not place checkout shortcodes in hidden tabs or heavily cached fragments until tested.
- Exclude account and checkout pages from aggressive caching if your caching plugin causes login or payment issues.



13. Signup forms, checkout buttons and payment buttons

Signup and checkout shortcodes control how visitors become members. You can use provider-specific buttons or provider-neutral buttons depending on the page design and payment methods enabled.

Shortcode	Use
[fmm_free_signup]	Displays a free membership signup button or form. Key options include text, show_form and class.
[fmm_signup_form]	General signup form template with gateway selection.
[fmm_checkout]	Provider-neutral checkout shortcode that can show available options for a selected level.
[fmm_payment_buttons]	Alternative provider-neutral payment button output.
[fmm_stripe_checkout]	Stripe checkout interface for paid subscriptions. Key option: level.
[fmm_stripe_subscription_button]	Stripe subscription button for a specific level.
[fmm_paypal_subscription_button]	PayPal subscription button for a specific level.
[fmm_subscription_button]	Generic subscription button helper.
[fmm_customer_portal]	Displays a button/link to a billing/customer portal where supported.

Examples

Example shortcodes

```
[fmm_free_signup text="Join Free" show_form="true"]  
[fmm_checkout level="1"]  
[fmm_stripe_subscription_button level="1" text="Join with Card"]  
[fmm_paypal_subscription_button level="1" text="Subscribe with PayPal"]
```

Level numbering

Paid levels are usually referenced by their level index. Free is level 0. The first paid level is normally level 1. Confirm the exact level index from your Membership Levels settings before publishing buttons.



14. Managing members in WordPress admin

The All Members screen is the main administration area for viewing and managing members. It is designed for admin-level control, so only trusted staff should have access.

Add New Member Create a member manually from WordPress admin. Useful for complimentary accounts, migrated users or internal testing.	Edit Member Update member profile fields, addresses, membership status, payment information and access details.
Email Member Send a member an email using a saved template or custom admin message.	Purchase History Review purchase and subscription history connected to the user where available.
Admin area	Typical fields / actions
Basic Information	Name, email, login-related details and core user information.
Address Information	Home address, delivery address and customer contact data where collected.
Membership Details	Membership level, role/status and access state.
Payment Information	Payment provider, customer/subscription identifiers and related billing information where available.
Purchase History	Previous purchases, separate sales and download-related transactions where recorded.
Email Member	Choose an email template or create a custom message for that member.
Manual changes If you manually change a member level or role, test their front-end access in a private browser session. Payment providers may later send webhook events that update the same member.	



15. Customer accounts and member profile tools

Customer account shortcodes allow logged-in members to view and manage their account information. These pages reduce support queries because members can check their own subscription details, downloads and purchase history.

Shortcode	What it displays
[fmm_account_page]	Complete member account dashboard.
[member_info]	Displays a specific member field such as name, email, level, since or next_payment.
[subscription_details]	Displays the current subscription status and details.
[fmm_profile_edit]	Front-end profile editing form including personal, password and address details.
[fmm_subscription_history]	Subscription and payment history display.
[account_link]	Generates a link to an account page with custom text/class options.
[fmm_customer_portal]	Customer portal access button for billing management where supported.

Member info examples

Example personalised content

Welcome back, [member_info field="name" default="member"]!

Your current level is [member_info field="level"].

Member since: [member_info field="since" format="F Y"]

- Place account tools on pages that require login.
- Keep billing portal links separate from editorial content.
- Use member_info fields for simple personalised dashboard text.
- Test account pages as a free member and as each paid level.



16. Content protection and member-only areas

PINXS Member Manager supports protected content through shortcodes, page/post controls and Elementor/page-builder features. Use a layered approach: protect full pages where possible, and use wrapper shortcodes for smaller content blocks.

Protection method	Use case
[members_only]	Wrap content that should only be visible to specific membership levels.
[free_members]	Show content only to free members.
[non_members]	Show promotional/signup content only to visitors who are not logged in as members.
Page/post meta box	Protect whole posts or pages from the editor without wrapping every section manually.
Elementor protected content widget	Protect a selected section or widget area inside an Elementor layout.

Content protection examples

Example protected content

```
[members_only level="level_1" message="Please upgrade to access this lesson."]
```

Premium lesson content goes here.

```
[/members_only]
```

```
[non_members]
```

Create a free account to access starter resources.

```
[/non_members]
```

Good practice

- Use clear upgrade messages when a member does not have access.
- Avoid hiding essential legal, refund or account information behind paid access.
- Test as a logged-out visitor, free member and each paid level.
- Do not rely on menu hiding alone. The content itself must be protected.
- Use caching exclusions for highly personalised protected pages if necessary.



17. Download manager and protected digital files

The Downloads area lets you create protected digital products and files. Downloads can be restricted to member levels, shown as cards, listed in catalogues and optionally sold separately.

Download setting	Purpose
Download title	Admin and customer-facing name of the file/product.
Download file	The actual protected file or resource to be delivered.
Member access	Controls which membership levels can access the download.
Featured/default image	Thumbnail used in download cards and catalogue layouts.
Category	Organises downloads by type, topic or product group.
Separate sales	Allows the download to be sold individually outside a membership level.
Price	Price used when separate sales are enabled.
Stripe Product ID	Stripe product/price reference for separate sales where required.
Shortcode output	Copyable shortcode for download buttons, cards and lists.

Creating a protected download

50. Open PINXS Members > Downloads.
51. Choose Add New or use the enhanced downloads interface if available.
52. Enter a clear title and description.
53. Upload or select the download file.
54. Choose the member levels allowed to access it.
55. Assign a category if you use download catalogues.
56. Set a featured image or rely on the configured default product image.
57. Publish or save the download.
58. Copy the generated shortcode and test as a member with access.

File protection

Keep sensitive download files under the plugin workflow rather than linking directly to public media files where possible. Test that non-members cannot access protected files.



18. Separate sales and buy buttons for individual downloads

Separate sales allow you to sell a download individually, even if it can also be included inside a membership. This is useful for one-off digital products, templates, software files, guides or premium resources.

Shortcode	Purpose
[fmm_buy_button id="123"]	Standalone buy button for a separate-sale download product.
[fmm_buy_button id="123" text="Purchase Now"]	Custom button text.
[fmm_buy_button id="123" show_price="false"]	Hides price display above the button.
[fmm_buy_button id="123" class="premium-button"]	Adds a custom CSS class for styling.
[member_download id="123"]	Smart download/buy button depending on member access and sale settings.
[download_card id="123"]	Product-style card with thumbnail, access/purchase state and optional price.

Separate sale requirements

- Enable separate sales on the download product.
- Set a valid price.
- Add the required Stripe product/price information if Stripe checkout is used.
- Create or confirm the download success page using [fmm_download_success].
- Test the purchase flow and confirm the file becomes available after purchase.

Membership plus one-off sales

The same digital file can be presented as part of a paid membership and as a separate purchase. Make the customer copy clear so visitors understand whether they are buying one item or joining a recurring membership.



19. Download categories and catalogue organisation

Download categories help organise growing download libraries. They are useful when members need to browse software, guides, templates, training resources or product files by topic.

Category task	Guidance
Create category	Use clear names such as Plugins, Themes, Guides, Templates, Training or Bonus Files.
Edit category	Keep category names short enough to display cleanly in cards and filters.
Assign downloads	Assign each download to the most useful category for customers.
Filter catalogues	Use category parameters in <code>downloads_list</code> when you need separate catalogue pages.

Downloads list examples

Example catalogue shortcodes

```
[downloads_list limit="12" layout="grid"]
```

```
[downloads_list category="plugins" limit="8" layout="grid"]
```

```
[download_card id="123" show_thumbnail="true" show_category="true"]
```

- Use a grid layout for visual catalogues.
- Use categories when one membership includes many different resources.
- Avoid very large pages with too many downloads; split into category pages if needed.
- Check that each card has a sensible image or default thumbnail.



20. Email templates, SMTP and test emails

Membership systems depend heavily on email. Customers need signup confirmations, welcome messages, purchase/download notifications and account-related emails. PINXS Member Manager includes email templates and SMTP settings so delivery can be configured from the plugin.

Email setting	Description
Use SMTP for sending emails	Sends plugin emails through an SMTP server instead of the default PHP mail function.
SMTP Host	Mail server hostname, such as smtp.gmail.com or your transactional email provider.
SMTP Port	Common values are 587 for TLS, 465 for SSL and 25 for non-encrypted mail.
SMTP Encryption	TLS is recommended where supported. SSL and None are also available.
SMTP Username	Usually the email address or username supplied by your mail provider.
SMTP Password	Mail password or app-specific password. Keep private.
From Email Address	Email address customers see as the sender.
From Name	Sender name customers see, normally the site or business name.
Send Test Email	Sends a test message to confirm the configuration works.

Email template workflow

59. Open PINXS Members > Email Templates.
60. Review each template before launch.
61. Keep subject lines clear and customer friendly.
62. Include the site name and support/contact route where useful.
63. Send a test template to confirm formatting and delivery.
64. Check messages in Gmail, Outlook and a mobile mail app if possible.

Email deliverability

If emails do not arrive, check SMTP credentials, spam folders, domain DNS records, SPF/DKIM/DMARC setup, and whether the hosting provider blocks outbound mail. For commercial sites, a proper transactional email service is strongly recommended.



21. Reports and performance monitoring

Reports help administrators understand membership activity, payment providers and download usage. Use reports during testing and after launch to catch problems early.

Report area	What to review
Payment Provider Summary	Stripe and PayPal activity, provider status and payment source split.
Member Statistics	Total members, free members, paid members and level distribution.
Download Statistics	Download activity and access patterns.
Top Downloads	Most-used files or resources. Useful for product decisions and support planning.

Operational checks

- Review reports after test payments to confirm data appears.
- Check that free signups do not appear as paid revenue.
- Compare payment provider dashboards with WordPress reports during launch testing.
- Investigate sudden changes in downloads or failed payments.
- Keep reports as an operational aid, not as the only financial record.



22. Elementor widgets and page builder usage

The plugin includes Elementor-related support for sites that use Elementor. Elementor is optional; the plugin can also be used with normal WordPress pages and shortcodes.

Elementor feature	Purpose
Subscription Button widget	Place a membership subscription button in an Elementor layout.
Member Info widget	Display member profile or membership information inside an Elementor design.
Protected Content widget	Protect a content area inside an Elementor page.
Downloads List widget	Display lists of available downloads in a designed layout.
Download Button widget	Place a download button for a selected file/product.
Section protection	Protect page builder sections so only selected members can see them.

- Use shortcode widgets when you want exact shortcode control.
- Use native plugin Elementor widgets when you want more visual editing controls.
- Test protected Elementor sections as logged-out visitors and each membership level.
- Avoid duplicating the same checkout button in multiple hidden responsive sections unless tested.



23. Styling, default product images and theme integration

The Styling tab controls how plugin forms, buttons and content blocks appear. You can inherit theme styling or use custom plugin styling.

Styling option	Description
Default Product Image	Upload a default thumbnail for downloads without a featured image. Recommended sizes include 400x300px or 400x225px.
Use Theme Styles	When enabled, plugin output inherits the active theme styling.
Primary / Secondary colours	Brand colours used for buttons, links and accents when custom styling is enabled.
Background / Text / Heading colours	Base colours used by forms, cards and output areas.
Button Background / Button Text	Controls button appearance.
Card Background / Card Border	Controls card and form container appearance.
Font Family	CSS font family for plugin output.
Base, heading, button and form font sizes	Typography sizing for different plugin elements.
Border Radius	Corner radius for cards and buttons.
Padding and Margin	Spacing inside and around plugin elements.

Branding recommendations

- Use theme styles if the active theme is already well designed.
- Use custom styling when the site needs stronger brand consistency across membership forms and download cards.
- Keep button colours consistent with the main site call-to-action colour.
- Upload a default product image so download cards never look incomplete.
- Test styling on mobile, especially forms and account pages.



24. Income and expenses integration

The plugin includes an optional integration with the PINXS Income & Expenses plugin. When enabled, membership and purchase transaction data can be sent to the accounting/expenses system for tracking.

Integration step	Guidance
Enable integration	Turn on the Income-Expenses Plugin Integration setting only when the accounting plugin is installed and working.
Test transaction	Run a controlled test purchase and confirm the transaction appears as expected.
Provider data	Check whether Stripe and PayPal transactions both record as intended.
Reporting	Do not rely on one system until you have compared payment provider records and income reports.

Accounting caution

Payment providers, WordPress reports and accounting exports can use different timing, fee and tax assumptions. Reconcile data carefully and use professional advice where required for tax or accounting decisions.



25. Shortcode quick reference

Shortcodes are the main way to build customer-facing membership pages. Copy shortcodes carefully and test each page as the correct user type.

Category	Shortcodes
Content protection	[members_only], [free_members], [non_members]
Signup and checkout	[fmm_free_signup], [fmm_signup_form], [fmm_checkout], [fmm_payment_buttons], [fmm_stripe_checkout]
Subscription buttons	[fmm_subscription_button], [fmm_stripe_subscription_button], [fmm_paypal_subscription_button], [fmm_customer_portal]
Member account	[fmm_account_page], [member_info], [subscription_details], [fmm_profile_edit], [fmm_subscription_history], [account_link]
Success/cancel pages	[fmm_member_success], [fmm_free_member_success], [fmm_member_cancel], [fmm_confirmation_page], [fmm_cancellation_page], [fmm_free_signup_page]
Downloads	[member_download], [download], [download_card], [downloads_list], [fmm_download_success]
Separate sales	[fmm_buy_button]

Useful examples

Shortcode examples

```
[members_only level="level_1" message="Upgrade to access this content"]Premium content[/members_only]
[fmm_free_signup text="Create Free Account" show_form="true"]
[fmm_checkout level="1"]
[fmm_account_page]
[member_info field="name" default="member"]
[downloads_list category="plugins" limit="12" layout="grid"]
[fmm_buy_button id="123" text="Buy Now" show_price="true"]
```

Shortcodes displaying as plain text

If a shortcode appears as plain text on the frontend, place it inside a Shortcode block/widget or in a content area that supports shortcode rendering.



26. Payment flow checklists

Free membership flow

65. Create or confirm the Free membership level.
66. Create a Free Signup page using [fmm_free_signup].
67. Create a Free Member Success page using [fmm_free_member_success].
68. Sign up with a test email address.
69. Confirm the WordPress user is created.
70. Confirm the user receives the free member role.
71. Confirm protected free-member content is accessible.

Stripe paid membership flow

72. Enable Stripe and Stripe test mode.
73. Enter test keys and test webhook secret.
74. Add a Stripe price ID to the paid level.
75. Place a Stripe or provider-neutral checkout button on the membership page.
76. Complete a test payment.
77. Confirm the user/member record is created or updated.
78. Confirm membership role/access is applied.
79. Confirm success email and success page display.
80. Check Stripe webhook delivery and WordPress reports.

PayPal paid membership flow

81. Enable PayPal and PayPal sandbox mode.
82. Enter PayPal client ID, secret and webhook ID.
83. Add a PayPal Plan ID to the paid level.
84. Place a PayPal subscription button on the membership page.
85. Complete a sandbox subscription.
86. Confirm the user receives the correct membership level.
87. Check PayPal webhook delivery and member status.
88. Test cancellation/failure behaviour where possible.



27. Security, backups and GDPR-style operational notes

Membership sites process customer accounts, email addresses, payments and access permissions. Treat the site as a commercial system and use sensible operational controls.

Area	Recommendation
Backups	Back up the database and uploads before plugin updates, level changes or major content changes.
Payment keys	Never publish secret keys or webhook secrets in screenshots, public documents or support forum posts.
Admin users	Limit administrator access to trusted staff. Use strong passwords and two-factor authentication where possible.
Downloads	Test that protected downloads cannot be reached by non-members.
Personal data	Only collect profile and address data you genuinely need.
Exports	Store exported member/payment/download reports securely.
Caching	Do not aggressively cache personalised account, checkout or protected content pages.
Updates	Test updates on staging before updating a busy live membership site.

Customer data responsibility

You remain responsible for how your website collects, stores, protects and processes customer data. This guide is not legal or accounting advice.



28. Troubleshooting

Issue	Likely cause	Suggested fix
Settings screen does not load	Browser cache, JavaScript error, conflicting admin script or failed REST request.	Hard refresh, clear cache, check browser console, use Payment Gateways fallback page if needed.
Stripe button does not show	Stripe disabled, missing key, missing level ID or missing Stripe price/product ID.	Enable Stripe, verify credentials and add a valid Stripe ID to the level.
PayPal button does not show	PayPal disabled, missing credentials or missing PayPal Plan ID.	Enable PayPal, verify credentials and add a PayPal Plan ID to the paid level.
Webhook not updating member	Wrong endpoint, wrong secret/ID, provider in test/live mismatch or blocked REST route.	Check webhook URL, mode, provider dashboard delivery logs and WordPress REST access.
Emails not arriving	PHP mail unreliable, SMTP settings wrong or DNS/authentication issue.	Configure SMTP, send test email, check spam, SPF, DKIM and DMARC.
Protected content visible to everyone	Content not wrapped/protected or wrong level selected.	Use page protection, members_only shortcode or Elementor protection and test logged out.
Member cannot access content	Wrong membership level, cached page or role not updated.	Check user roles, membership record, cache exclusions and payment webhook status.
Download unavailable	File missing, access level mismatch or download not published.	Check download file, member access settings, publish status and shortcode ID.
Shortcode appears as text	Editor area does not render shortcodes.	Use a Shortcode block/widget or supported theme area.
Reports do not match provider	Timing, test data, cancelled payments, refunds or reporting assumptions differ.	Compare date ranges, provider mode and transaction logs.

Information to collect for support

When contacting support, include the plugin version, WordPress version, PHP version, payment provider, test/live mode, relevant page URL, shortcode used, screenshots and recent steps taken. Never send secret keys in public messages.



29. Frequently asked questions

Can I offer a free membership?

Yes. Level 0 is reserved for the free membership level and bypasses payment.

Can I offer both Stripe and PayPal?

Yes. Enable both gateways and add the relevant Stripe and PayPal IDs to each paid level.

Can I sell one-off downloads as well as memberships?

Yes. Enable separate sales on the download product and use the buy button or download card shortcodes.

Do I need Elementor?

No. Elementor is optional. The plugin also works through normal WordPress pages and shortcodes.

Can members edit their profile?

Yes. Use the account page and profile edit shortcodes to provide front-end account tools.

Can I protect only part of a page?

Yes. Use wrapper shortcodes or Elementor protection for sections, or use page/post protection for whole pages.

Can I manually create a member?

Yes. Administrators can add or edit members from the admin member management area.

Why are there FMM shortcodes?

FMM is a historical internal prefix retained for compatibility. The product branding is PINXS Member Manager.

Should I use live payment keys during setup?

No. Use test/sandbox credentials first and switch to live only after the full workflow is tested.

What is the safest launch process?

Build on staging, test free/Stripe/PayPal/account/download/protection/email workflows, then migrate or repeat the setup on live with live credentials.



30. Final pre-launch checklist

- Plugin is installed, activated and licensed.
- Membership levels are named correctly and prices are correct.
- Stripe test flow has been completed successfully where Stripe is used.
- PayPal sandbox flow has been completed successfully where PayPal is used.
- Webhook endpoints have been created and secrets/IDs are saved.
- Public test/setup mode is disabled before launch.
- Required pages exist: membership/signup, success, cancel, account, download success and customer portal where needed.
- Shortcodes render correctly on the frontend.
- Protected pages and sections are hidden from logged-out users and wrong-level members.
- Free members can access free content and not paid content.
- Paid members can access the correct protected content and downloads.
- Download cards, download buttons and buy buttons work as expected.
- SMTP test email sends and arrives successfully.
- Email templates have been reviewed and branded.
- Reports show expected test activity.
- Caching/security plugins have not broken checkout, account pages or webhooks.
- A fresh backup exists before going live.
- Support/contact process is clear for customers who need help.

Launch reminder

A membership system should be tested like a real customer journey: visitor signs up, pays, receives email, logs in, views protected content, downloads files, updates account details and cancels or changes billing where supported.