

# **RS Membership!**

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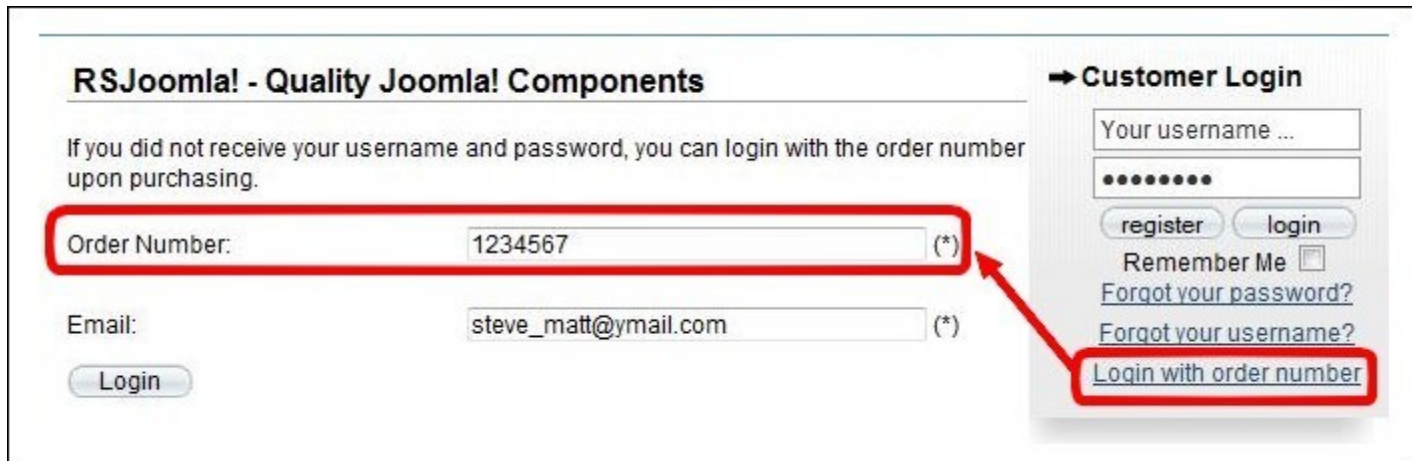
## Step 1: Purchasing a RSMembership! membership

When you purchase a membership for the first time, a **RSJoomla!** account is automatically created for unregistered users, after the purchase has been approved, based on the filled in data. The transaction along with the user details are sent in the registration email.

Upon transaction, users have 2 ways to access their [www.rsjoomla.com](http://www.rsjoomla.com) account and download RSMembership!:

1. login with the user and password automatically created and received on the email, during the transaction process using the **Customer Login** form.
2. login with the order number received on the user email.

### Login with the order number



The screenshot shows the RSJoomla! Customer Login interface. On the left, there is a form titled "RSJoomla! - Quality Joomla! Components" with a sub-header "Customer Login". Below the sub-header, it says "If you did not receive your username and password, you can login with the order number upon purchasing." There are two input fields: "Order Number:" with the value "1234567" and "Email:" with the value "steve\_matt@ymail.com". A "Login" button is below the email field. On the right, there is a "Customer Login" section with a "Your username ..." field, a password field (masked with dots), "register" and "login" buttons, a "Remember Me" checkbox, and links for "Forgot your password?" and "Forgot your username?". A red box highlights the "Login with order number" link, and a red arrow points from this link to the "Order Number:" input field.

## Step 2: Download RSMembership!

### 2.1. Download the component

To download RSMembership! you need to:

**Step 1:** login on [www.rsjoomla.com](http://www.rsjoomla.com) with the user details or the order number

**Step 2:** in the right side, you will find a section dedicated to RSJoomla! customers - **Customer Login**. Click on **View my downloads**



**Step 3:** In the **Customer downloads** section are listed all user memberships. Click on **Downloads >> RSMembership! Files >> Component >> Download RSMembership! for Joomla! 1.5**

| Customer Downloads |   |                           |                          |                     |           |        |  |
|--------------------|---|---------------------------|--------------------------|---------------------|-----------|--------|--|
| #                  | Membership                                      | Files                     | Licenses                 | Started             | Expires   | Status |  |
| 1                  | <a href="#">RSMembership! 1 Domain Lifetime</a> | <a href="#">Downloads</a> | <a href="#">Licenses</a> | 01.09.2010 07:16:41 | Unlimited | Active |  |

## 2.2. Download RSMembership! language files

Additionally, if you need RSMembership! translated in other languages, you can download the available RSMembership! language files from **Customer Downloads >> RSMembership! Files >> Languages** or [create your own language file.](#)

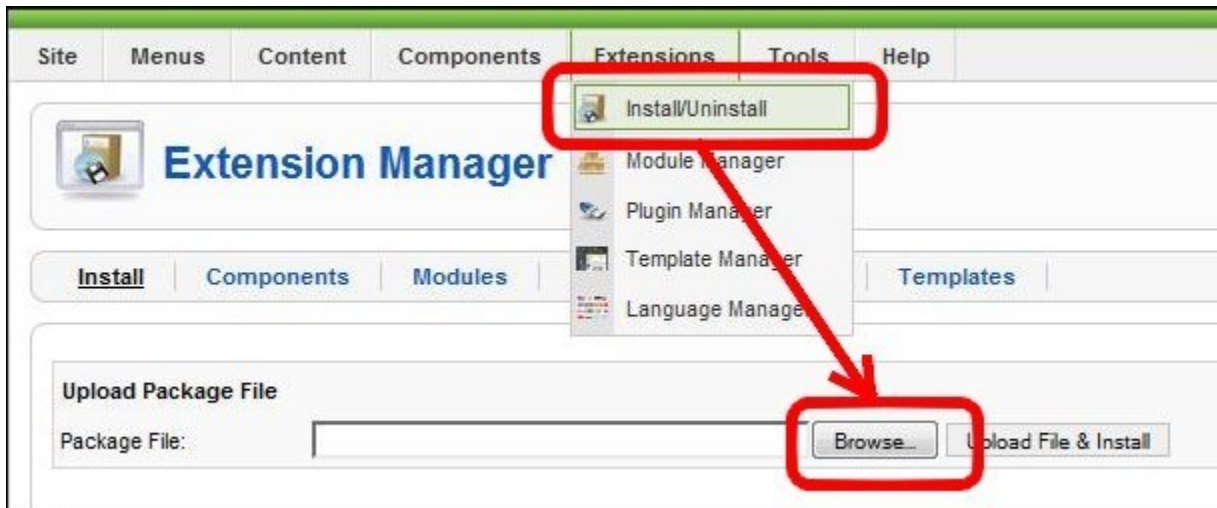
Available files:

|   | Name                       |
|---|----------------------------|
|  | ..                         |
|  | <a href="#">English</a>    |
|  | <a href="#">Swedish</a>    |
|  | <a href="#">french.zip</a> |

## Step 3: Installing RSMembership!

### 3.1: Installing the component

RSMembership! installs like any other component, through the Joomla! installer. In the backend panel, head to **Extensions >> Install/Uninstall >> Browse the installation package from your computer >> Upload File & Install**



### 3.2: Installing the language files

The language files install same as the component, trough the Joomla! installer (see the above screenshot), the only condition in order to work is to have previously installed the Joomla! languages pack for frontend and backend.

1. **Install the Joomla! languages pack** (if there aren't already installed):
  - a. Head to <http://community.joomla.org/translations.html> and choose the desired translation.
  - b. Download the corresponding Joomla! languages pack for frontend and backend.
  - c. Install the Joomla! languages pack (regular installation trough the Joomla! installer): in the backend panel head to **Extensions >> Install/Uninstall >> Browse the Joomla! language files >> Upload**
  - e.g. If you want to translate RSMembership! in Dutch, first of all install the Dutch Joomla! languages pack for frontend and backend, from <http://joomlancode.org>  
*nl-NL\_joomla\_lang\_site.1.5.20.zip*  
*nl-NL\_joomla\_lang\_admin.1.5.20.zip*
2. **Install the RSMembership! languages pack:** (regular installation trough the Joomla! installer)
  - a. Download the RSMembership! language files from [www.rsjoomla.com](http://www.rsjoomla.com) - Customer Downloads (see [Step 2.2. Download RSMembership! language files](#))
  - b. In the backend panel, head to **Extensions >> Install/Uninstall >> Browse the RSMembership! language files >> Upload**

## Step 4: Update RSMembership! to a newer version

RSMembership! has an "Updates" tab especially designed to smooth the update process.

There are 2 ways to update the RSMembership! component:

- **4.1 - using the "Updates" tab :**

To be able to receive updates directly in the Joomla! backend panel, you need to enter the RSMembership! license codes.

#### Step 1:


To get the license code, login to your RSJoomla! account and in the Customer Downloads section, click on the Licenses link.


| Customer Downloads |   |                           |                          |                     |           |        |
|--------------------|---|---------------------------|--------------------------|---------------------|-----------|--------|
| #                  | Membership                                      | Files                     | Licenses                 | Started             | Expires   | Status |
| 1                  | <a href="#">RSMembership! 1 Domain Lifetime</a> | <a href="#">Downloads</a> | <a href="#">Licenses</a> | 01.09.2010 07:16:41 | Unlimited | Active |

### Step 2:

After you will enter the domain name (click on the “Licenses” option, near the “Downloads”) , a license code will be generated.

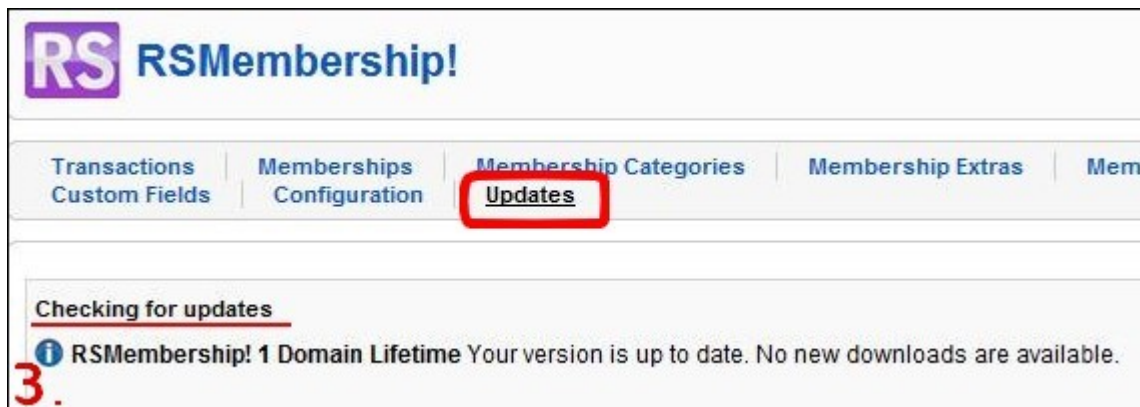
Copy the license code and paste it in the RSMembership! control panel from backend.





|  |  |
|--|--|
| RSMEMBERSHIP! 1.0.0 REV 12   |  |
|  |  |
| Installed version:   | 1.0.0  |
| Copyright:   | ©2009-2010 www.rsjoomla.com                        |
| License:   | GPL Commercial License                             |
| Author:  | www.rsjoomla.com                                   |
| Please enter your license code to receive updates                                  | <input type="text" value="MYLICENSECODE"/>         |
| <b>2.</b>  | <input type="button" value="Update Registration"/> |

### Step 3:

Whenever you want to check new RSMembership! updates, in the Joomla! backend panel head to **Components >> RSMembership! >> Updates** and you will be able to download the component directly from the backend.



|   |   |                                       |                                   |                     |
|---|---|---------------------------------------|-----------------------------------|---------------------|
|    |   |                                       |                                   |                     |
| <a href="#">Transactions</a>  | <a href="#">Memberships Configuration</a> | <a href="#">Membership Categories</a> | <a href="#">Membership Extras</a> | <a href="#">Mem</a> |
| <a href="#">Custom Fields</a>   | <a href="#">Configuration</a>             | <b>Updates</b>                        |                                   |                     |
| <b>3.</b> <u>Checking for updates</u>   |   |                                       |                                   |                     |
|  RSMembership! 1 Domain Lifetime Your version is up to date. No new downloads are available. |   |                                       |                                   |                     |

- **4.2 - trough the default Joomla! installer:** download RSMembership! from your RSJoomla! account - *View my downloads.*



In the Joomla! backend panel head to **Extensions >> Install/Uninstall >> Browse the RSMembership! package >> Upload.**



**Notice:**

- To simplify the update process and receive updates, we recommend to enter your license code generated in your RSJoomla! account and then follow the step **4.1** - using the “Updates” tab.

## Step 5: Configure RSMembership!

Path: **Joomla! backend panel >> Components >> RSMembership! >> Configuration**

### 5.1 Add the license code

**Add the license code** generated in your RSJoomla! account in order to receive updates and download newer RSMembership! versions directly from the backend.

For more information about the license code and the update process see [Step 4: Update RSMembership! to a newer version](#))

The screenshot shows the Joomla! backend interface for RSMembership! configuration. At the top, there are several tabs: 'Transactions', 'Memberships', 'Membership Categories', and 'Memberships'. Below these, there are sub-tabs: 'File Terms & Conditions', 'Users', 'Custom Fields', and 'Configuration'. The 'Configuration' tab is highlighted with a red box. Below the tabs, there are four sub-tabs: 'General', 'Joomla! Patches', 'Expiration Notification Settings', and 'Subscriber Fields'. The 'General' sub-tab is active. In the 'General' sub-tab, there are two input fields. The first is labeled 'Please enter your license code to receive updates' and contains the placeholder text 'MYLICENSECODE'. The second is labeled 'Date and Time Format' and contains the value 'd.m.Y (H:i:s)'. Red arrows point from the 'Configuration' tab to both input fields.

### 5.2 Set the date & time

**The date and Time format** tab (see the above screenshot) allows you to set a single central point of configuration for dates that will be used throughout RSMembership!. This is essentially a mask that will be applied to all RSMembership! stored dates. A complete list of usable mask is available [here](#).

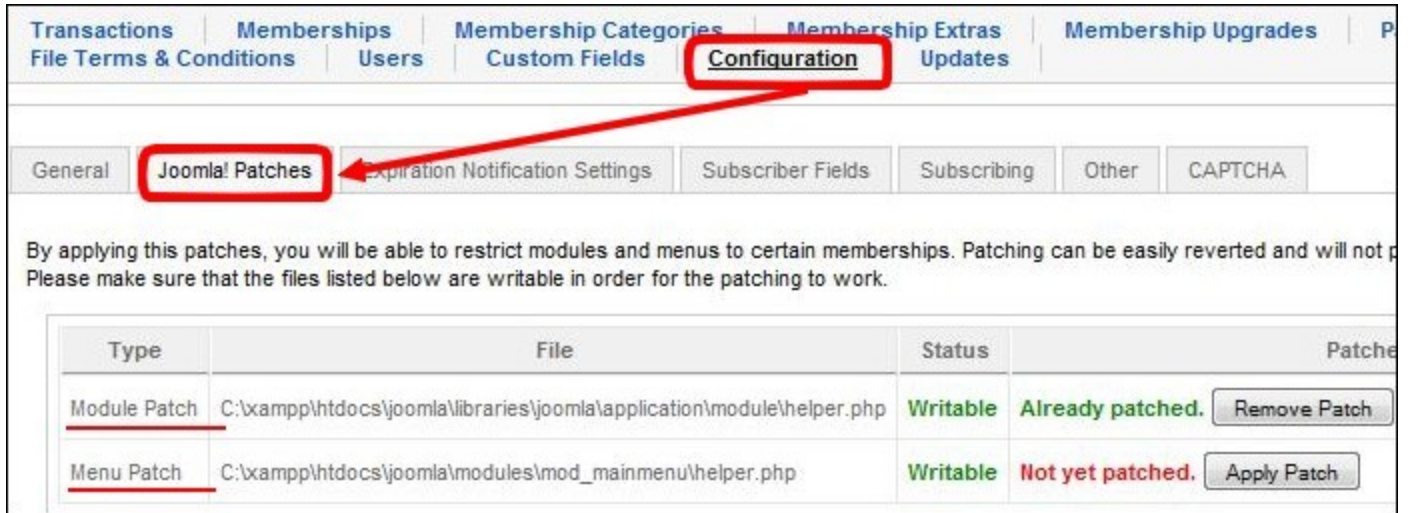
By default, the *d M y H:i* mask is used.

### 5.3 Apply Joomla! Patches (optional)

This tab allows you to apply two patches (for modules and menus).

By applying this patches, you will be able to restrict modules and menus to certain memberships. Patching can be easily reverted and will not produce any errors in your website.

Please make sure that the files listed below are writable in order for the patching to work.



The screenshot shows the Joomla! Configuration interface. The 'Configuration' tab is selected and highlighted with a red box. Below it, the 'Joomla! Patches' sub-tab is also highlighted with a red box. A red arrow points from the 'Configuration' tab to the 'Joomla! Patches' sub-tab. Below the sub-tab, there is a text block explaining the purpose of the patches and a table listing the patches.

By applying this patches, you will be able to restrict modules and menus to certain memberships. Patching can be easily reverted and will not produce any errors in your website. Please make sure that the files listed below are writable in order for the patching to work.

| Type         | File  | Status   | Actions                                       |
|--------------|---|----------|---|
| Module Patch | C:\xampp\htdocs\joomla\libraries\joomla\application\module\helper.php | Writable | Already patched. <a href="#">Remove Patch</a> |
| Menu Patch   | C:\xampp\htdocs\joomla\modules\mod_mainmenu\helper.php                | Writable | Not yet patched. <a href="#">Apply Patch</a>  |

### 5.4 Expiration notification settings

The tab allows you to configure the number of the expiration notification emails that will be sent per cycle and a buffer time (minutes) between notification checks.



The screenshot shows the Joomla! Configuration interface. The 'Configuration' tab is selected and highlighted with a red box. Below it, the 'Expiration Notification Settings' sub-tab is highlighted with a red box. A red arrow points from the 'Configuration' tab to the 'Expiration Notification Settings' sub-tab. Below the sub-tab, there are two input fields for configuring the notification settings.

Number of emails to be sent per cycle:

Check for notifications to be sent every:  Minutes

## 5.5 Add subscriber fields

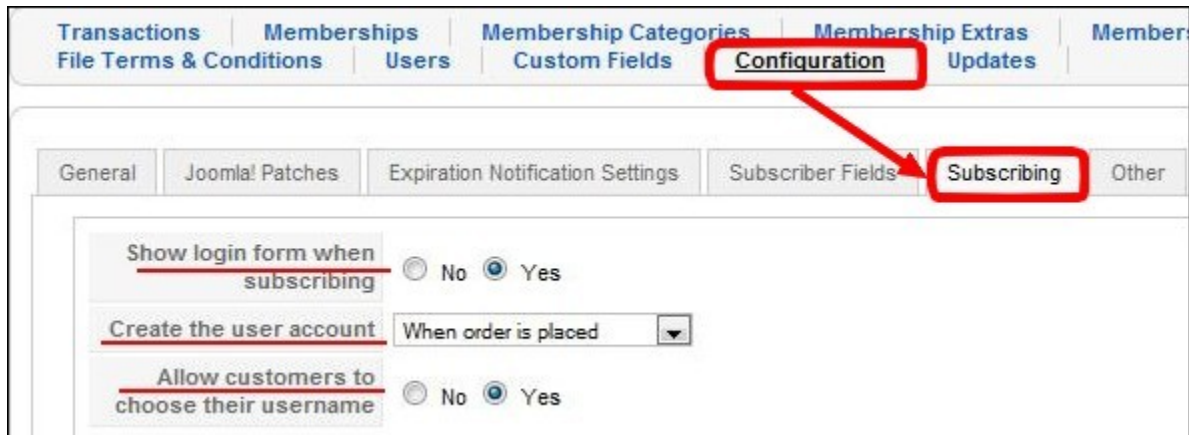
See [step 7: Add custom fields to your membership subscription form \(optional\)](#)



## 5.6 Subscribing settings

The “**Subscribing**” tab allows you to enable/disable some subscribers settings:

- **Show login form when subscribing:** when this option is enabled, it displays in frontend the default Joomla! login form; the subscriber can login
- **Create the user account:** *when order is placed / when payment is received*
- **Allow customers to choose their username** when subscribing to memberships.



## 5.7 Other settings

- **Add the currency code:** this is the standard currency code used in online transactions. You'll find a list with these codes on the PayPal page:  
[https://www.paypal.com/us/cgi-bin/webscr?cmd=p/sell/mc/mc\\_wa-outside](https://www.paypal.com/us/cgi-bin/webscr?cmd=p/sell/mc/mc_wa-outside)

- **Set the price format:** this is the price format shown to the end user. You can use the **{price}** and **{currency}** placeholders. If you don'tt want to use the **{currency}** placeholder, just type the desired currency format.  
*e.g. **\${price}** to show \$1.00, **USD {price}** to show USD 1.00, **{price}\$** to show 1.00\$ and so on.*
- **Set the text for free products:** set this to Yes if you want to show the text **FREE!** instead of actually showing 0 for memberships that cost 0.

- **Pending transactions option:** add the amount of time after which RSMembership! deletes the pending transactions; if transactions haven't been confirmed after the configured amount of time, these will be **automatically deleted**.
- **Disable Joomla! registration URL:** by **disabling the Joomla! registration**, users will be **redirected** either to RSMembership! or another page you can setup below.
- **Set the registration page URL:** if you disable the standard Joomla! Registration, you can redirect the user to this custom URL. If you'll leave it blank the user will be redirected to the memberships page.

## 5.8 CAPTCHA settings

When enabling the CAPTCHA, you can use the built-in CAPTCHA or reCAPTCHA for the membership registration forms.

- **Enable CAPTCHA** - this setting will enable or disable the CAPTCHA/reCAPTCHA field for your registration form;

- **Display CAPTCHA For - Unregistered/Registered** - you can choose which user groups will need to pass the CAPTCHA validation;
- **Characters** - the number of characters the CAPTCHA image will contain;
- **Generate Lines** - in order to increase security you can choose to generate random lines in your image;
- **Case Sensitive** - choose if your CAPTCHA field validation will take the input case into consideration;
- **reCAPTCHA Public Key** - if you are using reCAPTCHA for your security, you will need to enter the public key retrieved from the reCAPTCHA site in this field;
- **reCAPTCHA Private Key** - this key is also retrieved from the reCAPTCHA site in order for the validation to work;
- **reCAPTCHA Theme** - choose the reCAPTCHA theme that best integrates with your template.

The screenshot shows the Joomla! Configuration interface. The 'Configuration' tab is selected and highlighted with a red box. A red arrow points from this tab to the 'CAPTCHA' sub-tab, which is also highlighted with a red box. The CAPTCHA settings are as follows:

- Enable CAPTCHA:**  (checked)
- Use Built-in Captcha:** Use Built-in Captcha (dropdown menu)
- Display CAPTCHA For:**  Unregistered  Registered
- Characters:** 5 (text input)
- Generate Lines:**  No  Yes
- Case Sensitive:**  No  Yes
- reCAPTCHA Public Key:** (empty text input)
- reCAPTCHA Private Key:** (empty text input)
- reCAPTCHA Theme:** Red (dropdown menu)

## Step 6: Add memberships in backend

### 6.1 Create membership categories

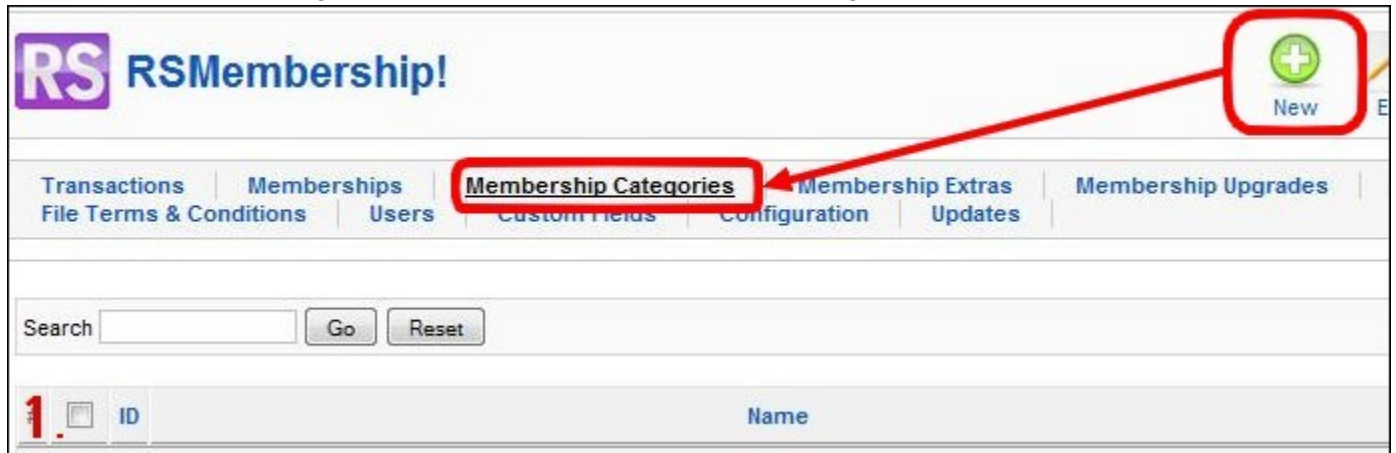
Path: **Joomla! backend panel >> Components >> RSMembership! >> Membership**

#### Categories

Before adding memberships in backend, you need to create categories.

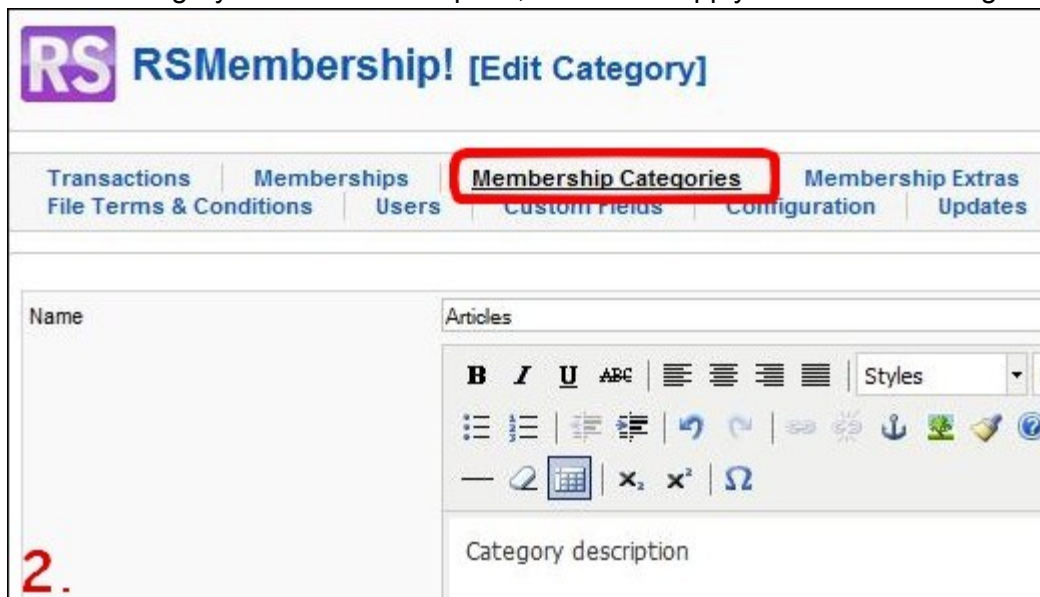
#### Step 1:

In the Membership categories, click on the “New” icon from the right panel.



#### Step 2:

Add the category name and description, then click “Apply” to save the changes.



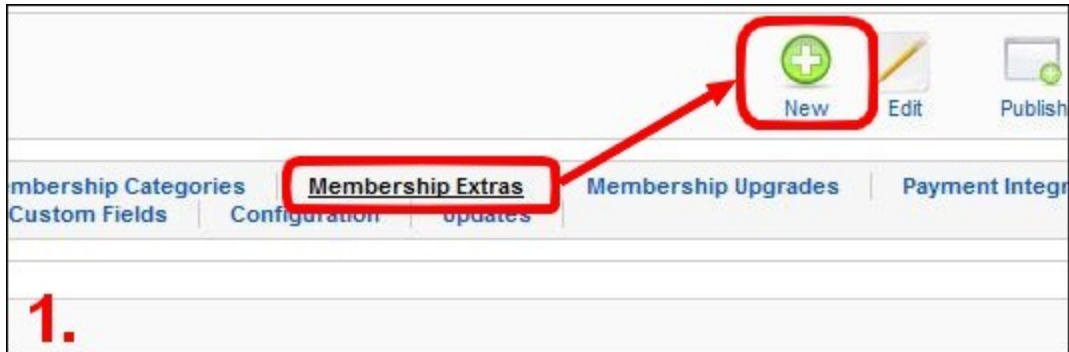
## 6.2 Add membership extras (optional)

Path: **Joomla! backend panel >> Components >> RSMembership! >> Membership Extras**

With RSMembership!, in addition to your standard membership subscription, you can offer users the possibility to purchase additional access permissions or downloads with the help of the **membership extras** packs.

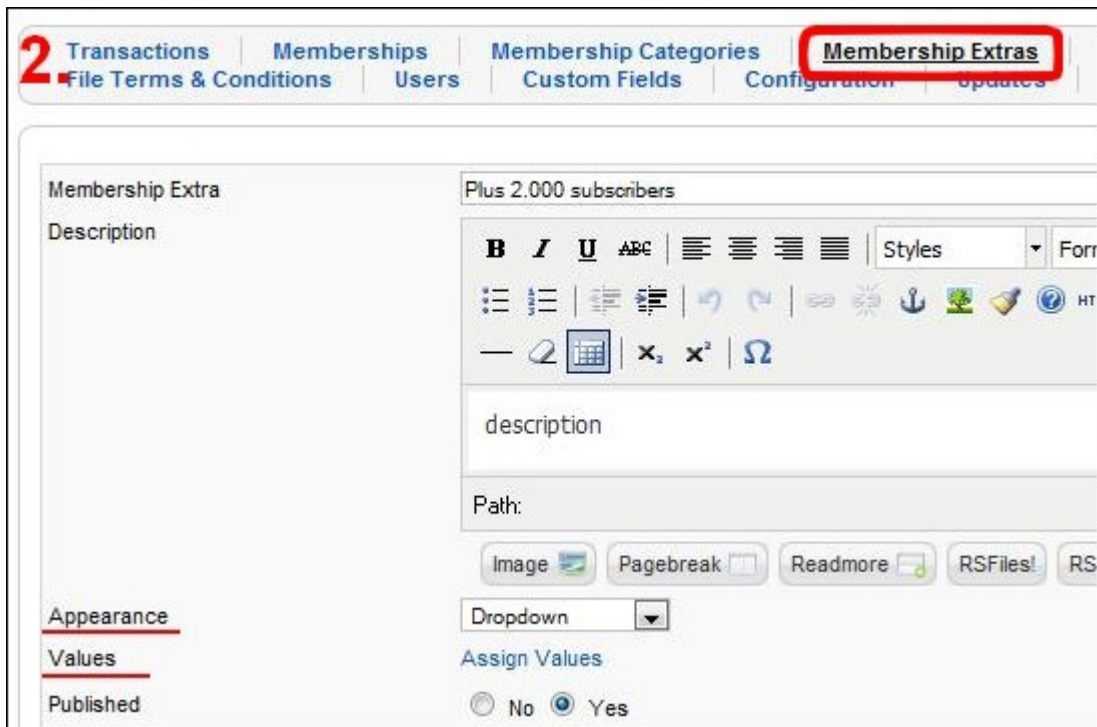
### Step 1:

In the **“Membership Extras”** tab, click on the **“New”** icon from the right side of the panel.



### Step 2:

- Add the membership title
- Add the membership description
- Select the appearance (you can choose between drop-down, radio group or checkboxes)
- Click **“Apply”** to be able to assign membership values



### Step 3:

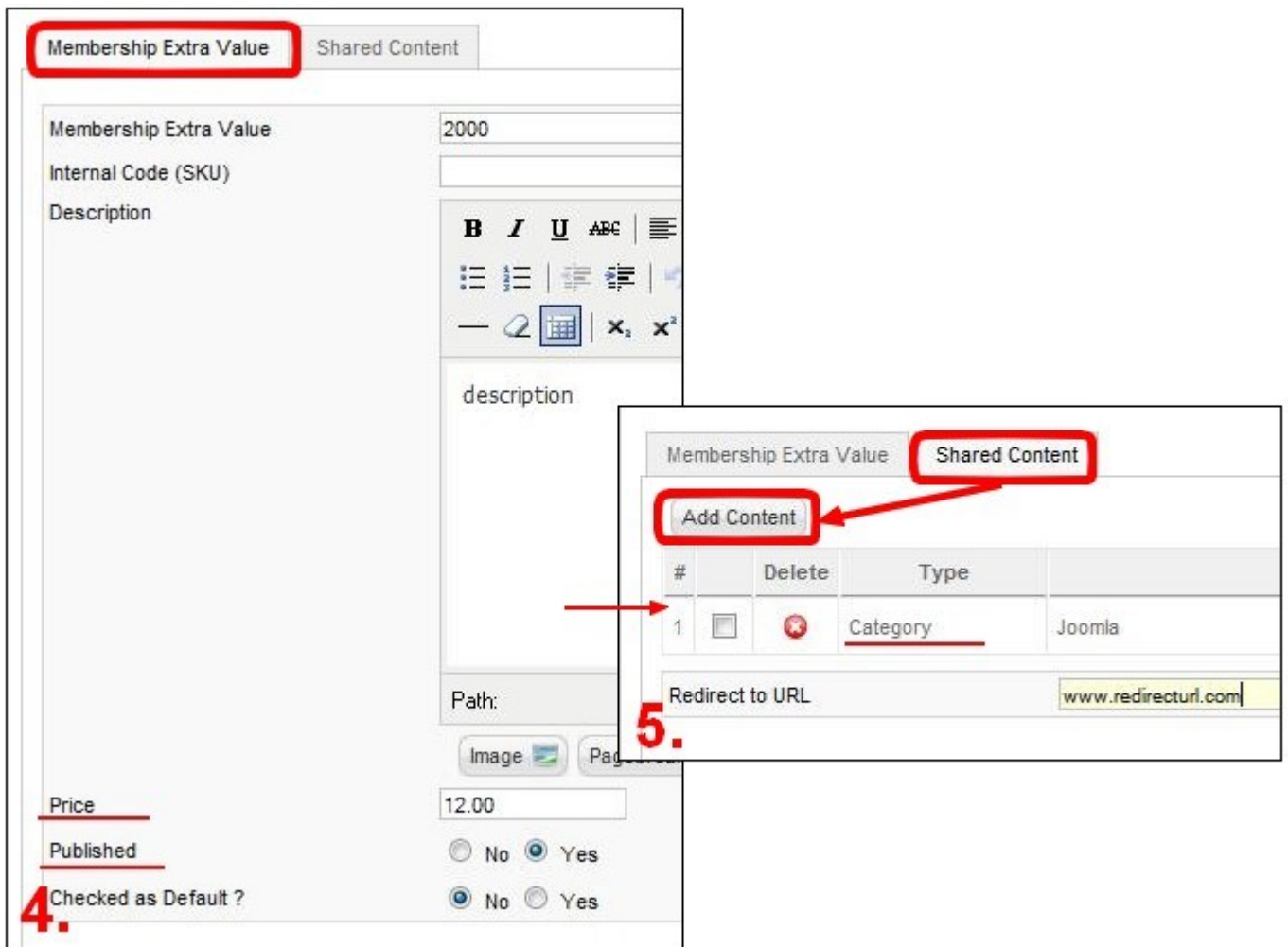
After saving your settings for the first time (click on the “**Assign Values**” option), you will be able to add the membership extra values.



Appearance    
Values  
Published  No  Yes

### Step 4,5:

- Click on the “**New**” icon to add the membership extra values: title, description, price.
- Click on the “**Shared Content**” tab to add the membership extra content. To learn how to set content restrictions see [step 6.4.5 Restrict content](#)



Membership Extra Value   
Internal Code (SKU)   
Description   
Price   
Published  No  Yes  
Checked as Default?  No  Yes

Membership Extra Value    
# Delete Type  
1   Category Joomla  
Redirect to URL



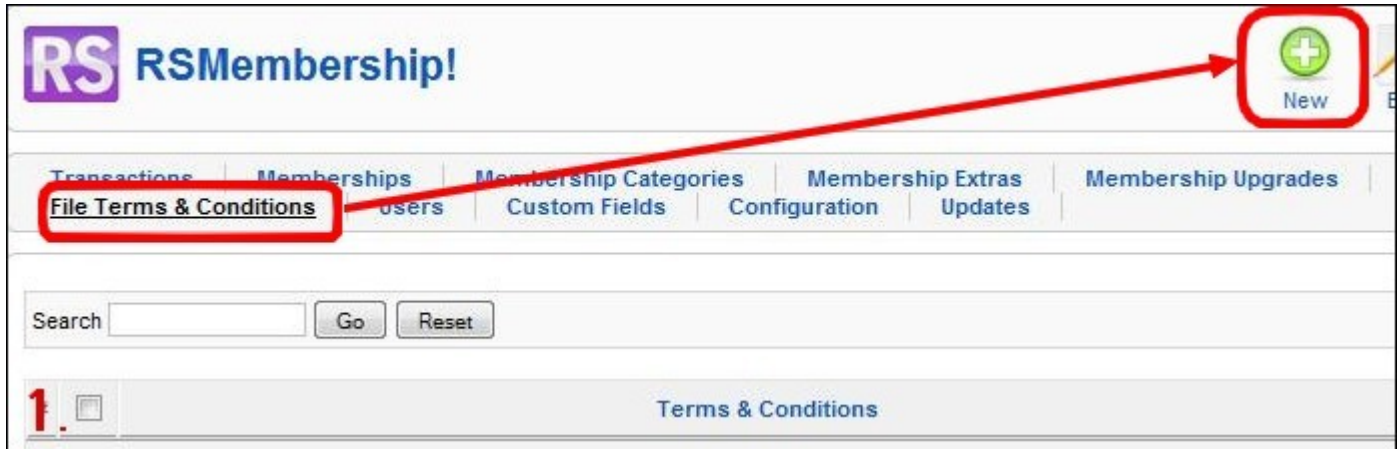
### 6.3 Add term and conditions (optional)

Path: **Joomla! backend panel >> Components >> RSMembership! >> File Terms & Conditions**

You have the possibility to attach a Terms& Condition file, when creating a new membership.

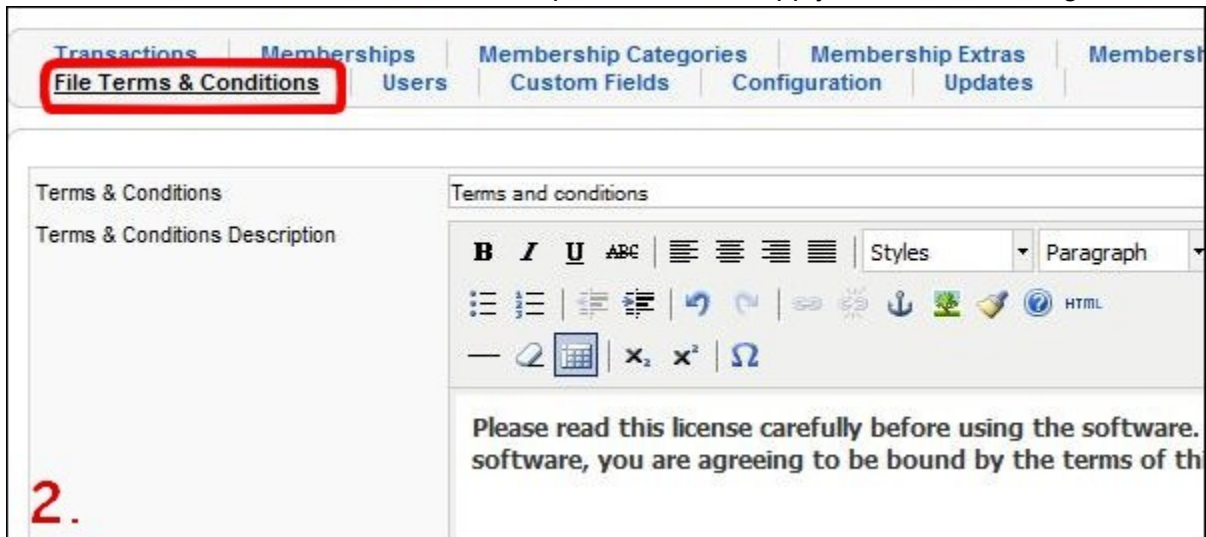
#### Step 1:

In the “File Terms & Conditions” tab, click on the “New” icon form the right panel.



#### Step 2:

Edit the terms & conditions title and description and click “Apply” to save the changes.

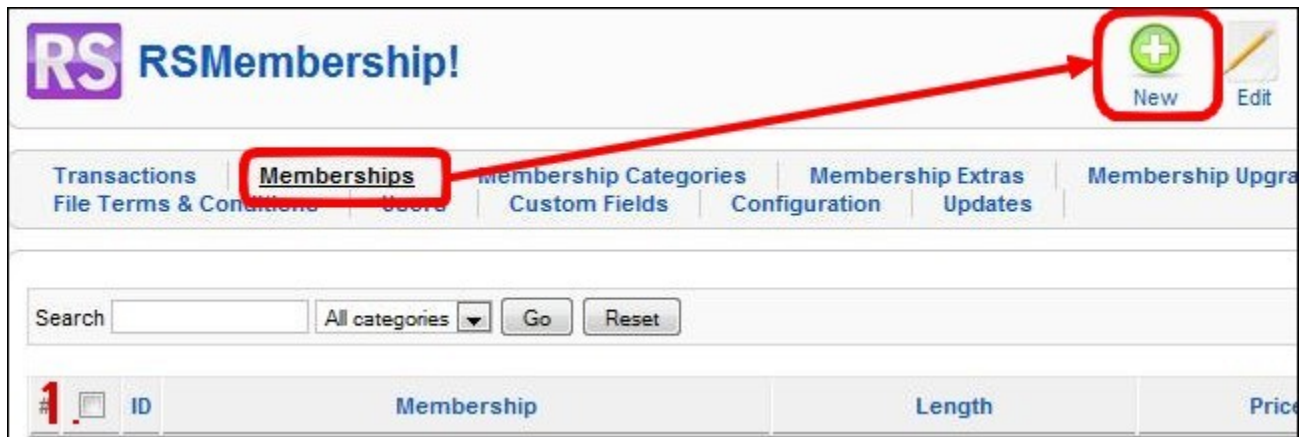


## 6.4 Create memberships

Path: **Joomla! backend panel >> Components >> RSMembership! >> Memberships**

### 6.4.1 Create a new membership

In the “Memberships” tab, click on the “New” icon to create a new membership.



### 6.4.2 Add membership basic information

- Add the membership title
- Select the membership category (optional)
- Set the internal code (SKU): a stock-keeping unit or SKU is a unique identifier for each distinct product and/or service that can be purchased.
- Add membership terms and conditions (optional)
- Add membership description: see the above placeholders that you can use when adding the description.

2.

#### Available placeholders (description area):

- **{extras}**: name of selected Extra options
- **{buy}**: adds a "buy" button
- **{price}**: price of the current membership

#### 6.4.3 Add stock info and the activation method

- **No. of Available Memberships** - Here you can set a limited number of available memberships - 0 for unlimited number, -1 for a out of stock setting
- **Activation** - You can control how the membership will become active:
  - **Manual** - After the user has subscribed to membership, the administrator will have to manually approve the request from the **"Transactions"** tab - see [step 10: Manage transactions](#)

- **Automatic** - The membership becomes active only after the payment has been confirmed by the payment gateway. Note that this has a variable time window, depending on the purchase, payment information and payment gateway.
- **Instant** - The membership is instantly activated.
- **Subscriber's User Type** - you can upgrade the user's account once he subscribes. You will only need to select the access level you want the user to have from the list.
- **Inactive User Type** - you can downgrade the user's account when his subscription expires. Similar to the above option you will only need to select the access level you want the user to have from the list
- **Disable Account When Membership Expires** - this option allows you to disable the user account completely when the subscription period expires

Membership Information **Stock & Activation** Membership Extras Share

Administrator's Email Adv

No. of Available Memberships

Activation

**Warning! Please take caution when testing these options using your own Administrator to whatever you select here and you will get locked out f**

Enable Changing User Types  No  Yes

Subscriber's User Type

- Public Front-end
- Registered
- Author
- Editor
- Publisher
- Public Back-end
- Manager
- Administrator
- Super Administrator

Inactive User Type

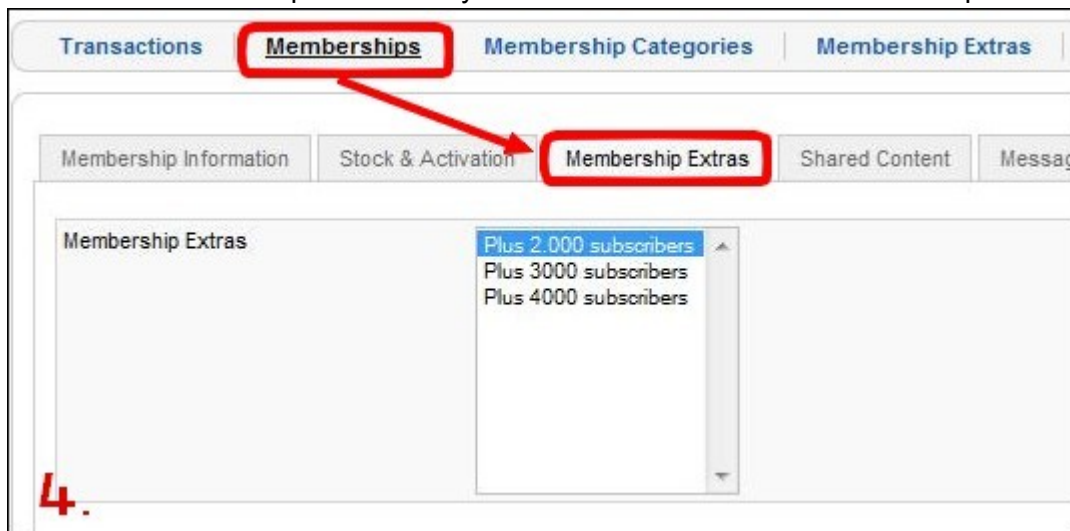
- Public Front-end
- Registered
- Author
- Editor
- Publisher
- Public Back-end
- Manager
- Administrator
- Super Administrator

Disable Account When Membership Expires ?  No  Yes

**3.**

## 6.4.4 Select the membership extras (optional)

Select the membership extras that you want to add to the new membership.



## 6.4.5 Restrict content

Path: **Joomla! backend panel >> Components >> RSMembership! >> Memberships >> Edit the membership >> Shared Content**

In the “**Shared Content**” area you can set what articles, folders or URLs can be accessed by purchasing the membership. If there are no items configured, your members will have access to all of your content area.

Restrictions can be imposed by:

- individual articles
- sections
- category
- folders
- URL

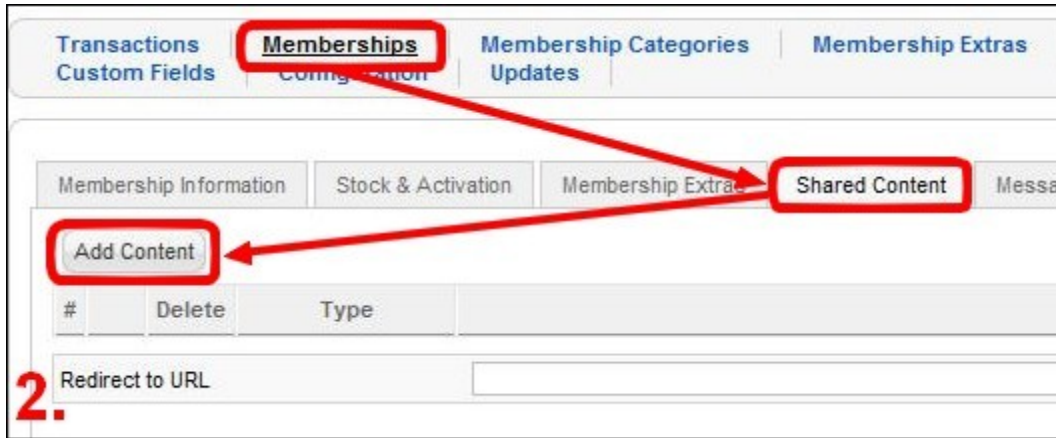
### 6.4.5.1 Add article restrictions

#### Step 1:

In the “**Memberships**” tab edit the membership for which you want to impose article restrictions.

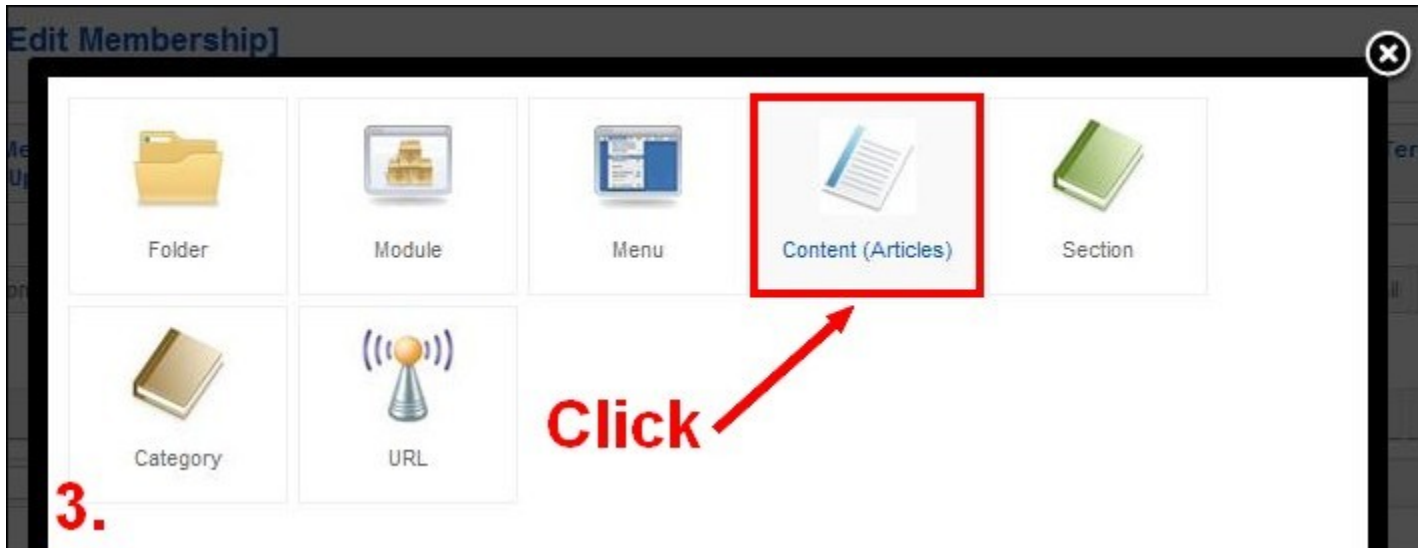
#### Step 2:

Click on the “**Shared Content**” area >> **Add Content**



**Step 3:**

In the modal window, click on the **“Content” (Articles)** icon to add the articles that you want to restrict.



**Step 4:**

Select from the list, the Joomla! articles for which you want to impose restrictions.



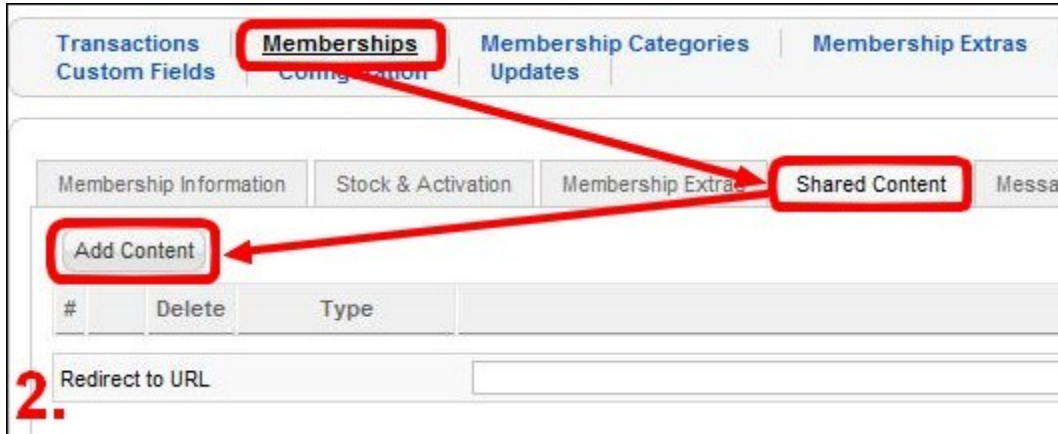
### 6.4.5.2 Add Joomla! sections restrictions

#### Step 1:

In the “**Memberships**” tab edit the membership for which you want to impose section restrictions.

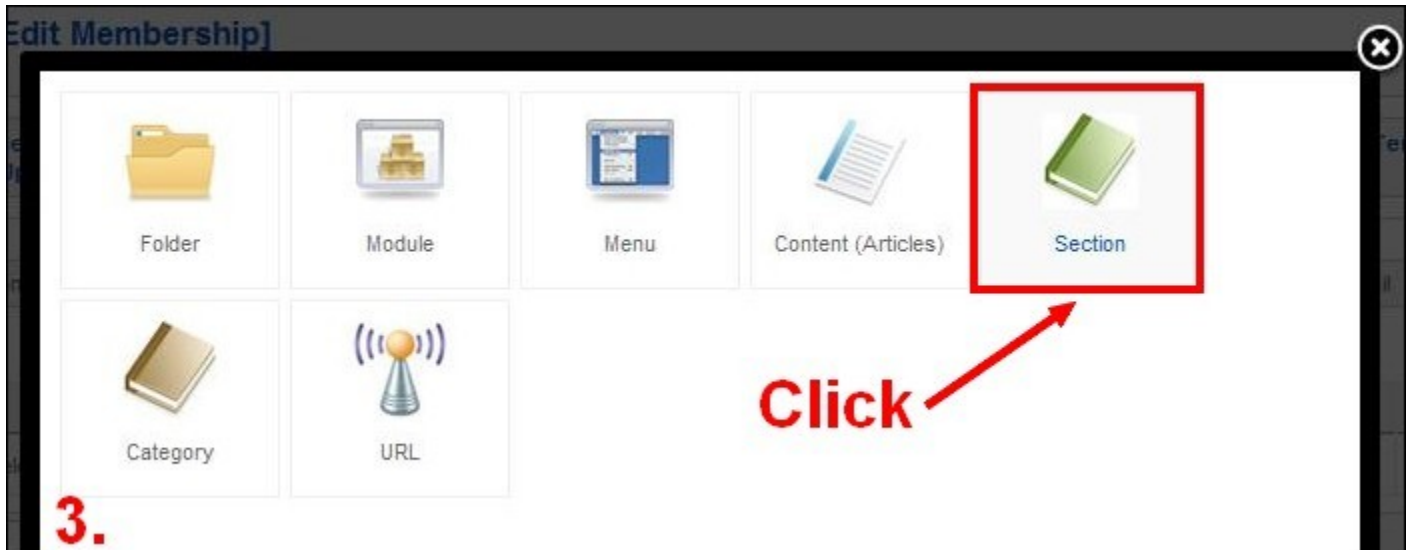
#### Step 2:

Click on the “**Shared Content**” area >> **Add Content**



#### Step 3:

In the modal window, click on the “**Section**” icon to add the Joomla! sections that you want to restrict.



**Step 4:**

Select from the list, the Joomla! sections for which you want to impose restrictions.



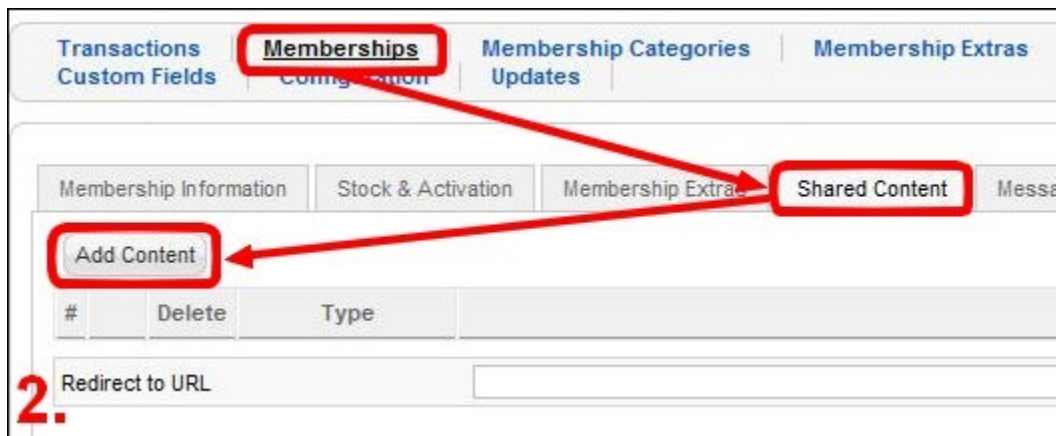
**6.4.5.3 Add Joomla! category restrictions**

**Step 1:**

In the “Memberships” tab edit the membership for which you want to impose category restrictions.

**Step 2:**

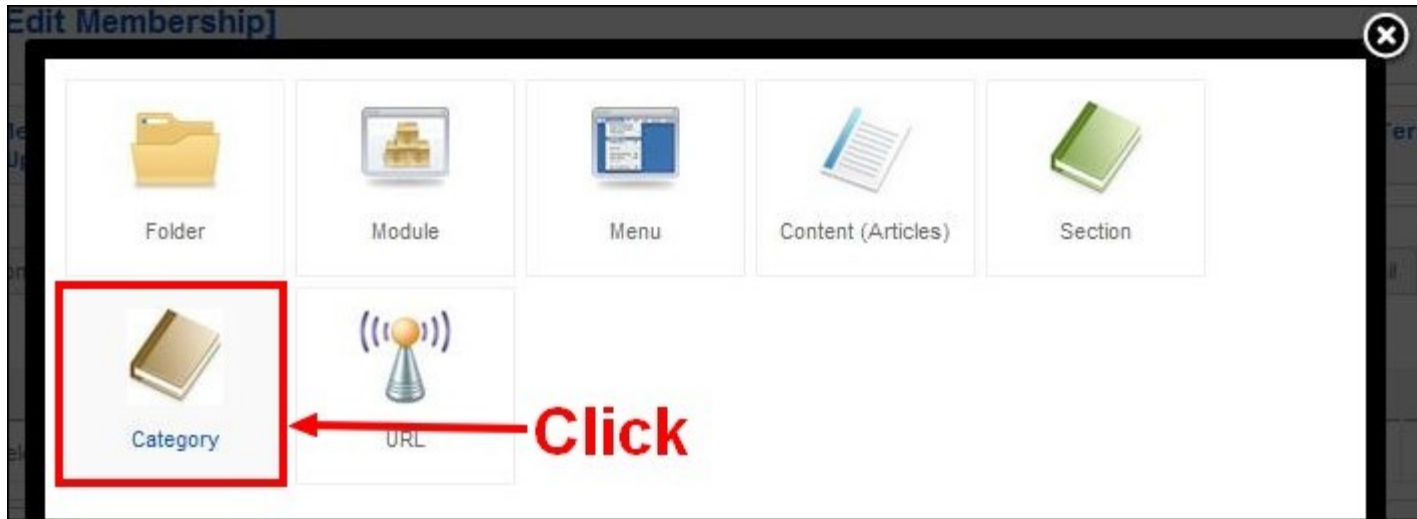
Click on the “Shared Content” area >> Add Content



**Step 3:**

In the modal window, click on the “Category” icon to add the Joomla! categories that you want to restrict.





**Step 4:**

Select from the list, the Joomla! categories for which you want to impose restrictions.



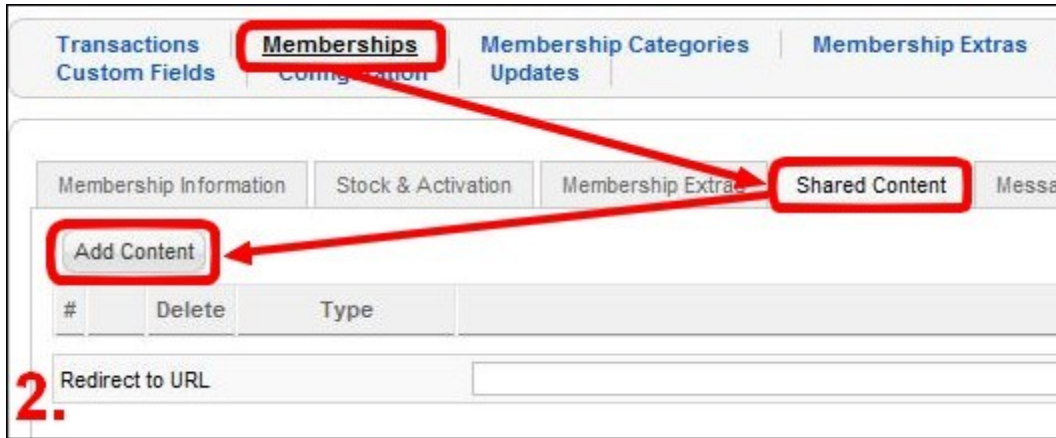
**6.4.5.4 Add folder restrictions**

**Step 1:**

In the “Memberships” tab edit the membership for which you want to impose folder restrictions.

**Step 2:**

Click on the “Shared Content” area >> Add Content



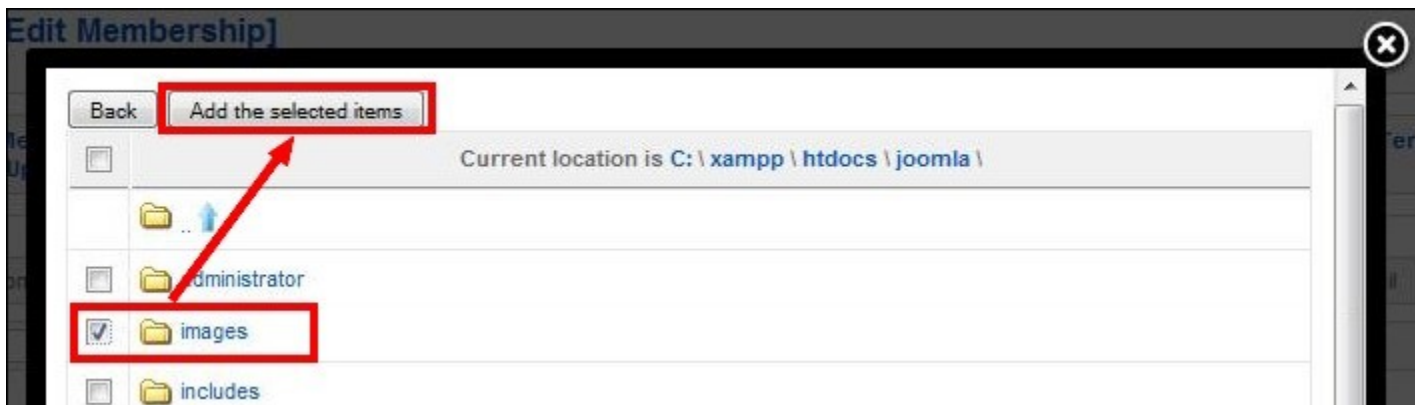
**Step 3:**

In the modal window, click on the **“Folder”** icon to add the articles that you want to restrict.



**Step 4:**

Select from the list, the folders for which you want to impose restrictions.



### 6.4.5.5 Add URL restrictions

When adding URL restrictions you can use wildcards:

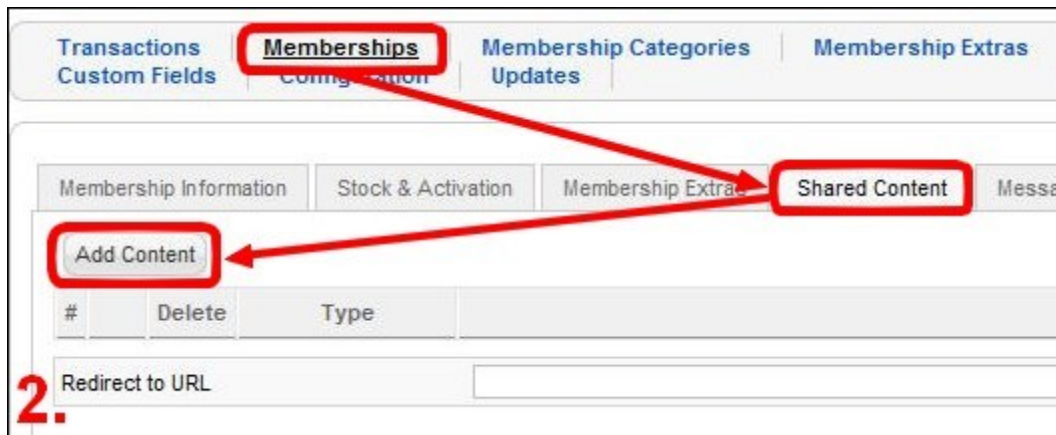
- `{*}` it replaces an unlimited number of chars.
- `{?}`: it replaces only one char

#### Step 1:

In the “**Memberships**” tab edit the membership for which you want to impose URL restrictions.

#### Step 2:

Click on the “**Shared Content**” area >> **Add Content**



#### Step 3:

##### a. Add URL restrictions with the `{*}` wildcard

- In the modal window, choose the link location backend/frontend
- Add the URL address that you want to restrict and replace characters with the `{*}` wildcard



#### Notice:

- The **`{*}` wildcard** replaces an unlimited number of characters in the URL  
e.g. if you have configured something like `index.php?option=com_virtuemart{*}`, the user will need to have the membership active to access the Virtuemart component (any page that contains `index.php?option=com_virtuemart.` )

- Click to **Add the URL**

**Edit Membership]**

**With the {\*} wildcard**

Back **Add the URL**

Please use the non-SEF version of the URL (eg. index.php?option=com\_content) in order for this to work. You can use the following wildcards: {\*} for any number of characters and {?} for one character.

URL Resides in Frontend

URL Address **index.php?option=com\_virtuemart{\*}**

Published  No  Yes

Add the URL

**b. Add URL restrictions with the {?} wildcard**

- In the modal window, choose the link location backend/frontend
- Add the URL address that you want to restrict and replace characters with the {?} wildcard.

**Notice:**

- The **{?}** wildcard replaces only one character in the URL.

**e.g.** if you have configured something like **index.php?option=com\_virtuemart&itemid={?}&category=32**

the user will need to have the membership active to access specific Virtuemart items (any page that contains **index.php?option=com\_virtuemart&itemid= ... &category=32** )

- Click to **Add the URL**

**Edit Membership]**

**With the {?} wildcard**

Back **Add the URL**

Please use the non-SEF version of the URL (eg. index.php?option=com\_content) in order for this to work. You can use the following wildcards: {\*} for any number of characters and {?} for one character.

URL Resides in Frontend

URL Address **index.php?option=com\_virtuemart&itemid={?}&category=32**

Published  No  Yes

Add the URL

**Notice:**

- If the user does not have the appropriate membership, or isn't logged in you can set a *custom redirect*.

## 6.4.6 Edit the “Thank You” message

*RSMembership* offers the possibility to set *redirection URLs* or *“Thank you messages”* depending on the purchased membership.

This tab will allow you to set whether you wish to display a message or to redirect:

- After Payment: display message/redirect URL
- Thank You Message: WYSIWYG editor area that allows to set custom HTML messages
- Redirect to URL: configurable text box, where you can set the URL, for example:  
*http://link1.com*

**Available placeholders:**

- **{membership}** - returns name of the selected membership
- **{extras}** - returns the selected options
- **{email}** - email address used for the subscription
- **{name}** - registered name
- **{username}** - the username chosen by the user for his account
- **{address}**
- **{city}**
- **{state}**
- **{zip}**
- **{country}**
- **{continue}** - returns a “Continue” button that redirects to the configured Return URL option

## 6.4.7 Configure the membership emails

### 6.4.7.1 Subscriber's email

Path: **Joomla! backend panel >> Components >> RSMembership! >> Memberships >> Subscriber's Email**

The Subscriber's email must be configured first in the **"Subscriber's Email Settings"** tab:

In this area you are able to set general, header information for the configurable emails located under the *Subscriber's Email*:

- Send Email as: Plain text/HTML
- From Name: The name of the email sender
- From Email Address: The email address of the sender

In the “**Subscriber’s Email**” **tab**, you are able to set the email body for various emails:

|                                  |
|----------------------------------|
| ▶ <b>Subscribe Email</b>         |
| ▶ <b>Approved Email</b>          |
| ▶ <b>Renewal Email</b>           |
| ▶ <b>Upgrade Email</b>           |
| ▶ <b>New Extra Added Email</b>   |
| ▶ <b>Expiration Notify Email</b> |

- **Subscribe Email:** send to the subscriber, received after **applying** for the current membership. You can set **attachments** to this email.
- **Approved Email:** Email send to the subscriber, received after his subscription is **approved**.
- **Renewal Email:** Email send to the subscriber, received after **renewing** the current membership.
- **Upgrade Email:** Email send to the subscriber, received after **upgrading** the current membership.
- **New Extra Added Email** send to the subscriber, received after **adding a membership extra**.
- **Expiration Notify Email:** this is the email the subscriber will receive when his membership is about to expire (before a predefined period of time).

*Available placeholders (also applies to the Administrator Email):*

- **{membership}** - returns name of the selected membership
- **{extras}** - returns the selected options
- **{email}** - email address used for the subscription
- **{name}** - registered name
- **{username}** - the username chosen by the user for his account
- **{address}**
- **{city}**
- **{state}**
- **{zip}**
- **{country}**
- **{interval}** - returns the specified period before membership expiration that will trigger the expiration email. This is only available in the Expiration Notify Email.

### 6.4.7.2 Administrator's email

Path: **Joomla! backend panel >> Components >> RSMembership! >> Memberships >> Administrator's Email**

This is the email the administrator will receive after someone has applied for a membership.

- Send Email: Plain text/HTML.
- To: Email address of the recipient.
- Subject
- Message

The screenshot shows the Joomla! Administrator's Email configuration interface. At the top, there are several tabs: Membership Information, Stock & Activation, Membership Extras, Shared Content, Messages, and Subscriptions. The 'Administrator's Email' tab is selected and highlighted with a red box. Below the tabs, there is a section titled 'This is the email the administrator will receive after someone has applied for a membership.' The interface includes fields for 'Send Email as' (with radio buttons for Plain text and HTML), 'To (Email Address)' (admin@mysite.com), and 'Subject' (someone has applied for a membership.). A rich text editor is visible, showing a toolbar with various formatting options and a message body that starts with 'Hello,' followed by a placeholder for the username and membership details: 'The {username} has applied for the membership {membership}'.

### 6.4.8 Advanced customization

Here you can place custom scripts in order to achieve that little "extra" that you need. The script will be executed after a subscription has been made and email (applying email) was send.

## 6.5 Create membership trials

Path: **Joomla! backend panel >> Components >> RSMembership! >> Memberships >> Membership Information >> One-Time Payment Settings**

Subscribers can view and test the shared content via the trial memberships.

Trials can be configured when creating or editing a membership, in the "Memberships" tab.



### Step 1:

In the “Memberships” tab, edit the membership for which you want to add a trial.



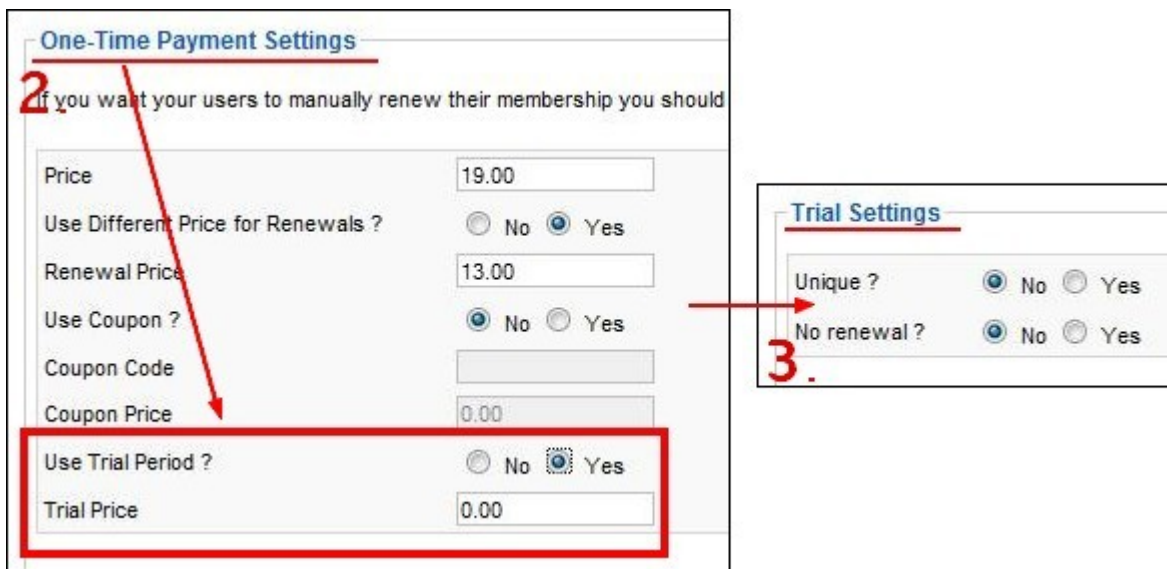
### Step 2,3:

Below the WYSIWYG editor used for editing memberships, you will find additional settings.

Head to “**One-Time Payment Settings**” option and enable the trial period.

When it is necessary, you can add a trial price. If the membership trial is free, leave the default field value - “0”.

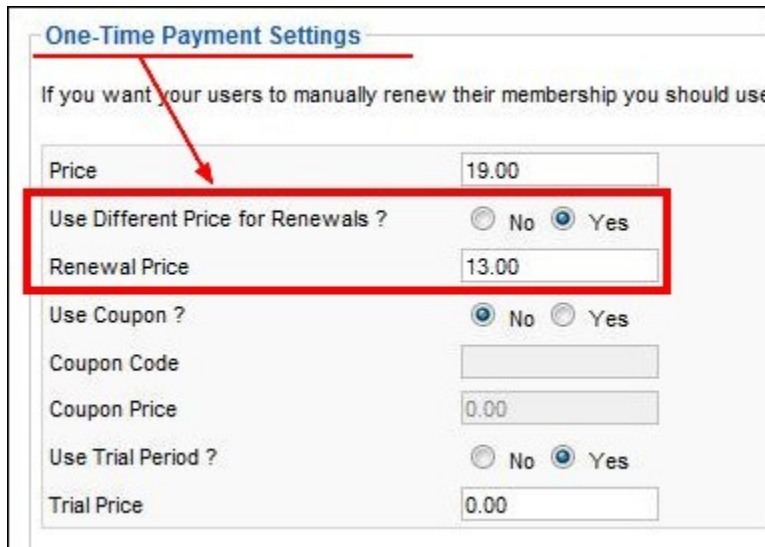
You can make trials unique and no renewal, so customers will have to upgrade to paid once it expires.



## 6.6 Configure one time payments

Path: **Joomla! backend panel >> Components >> RSMembership! >> Memberships >> Membership Information >> One-Time Payment Settings**

The one-time payment option allows your users to manually renew their membership. The configuration is simple: add the price membership and a different price for the renewal membership, in case that you want to charge more/less the second time.

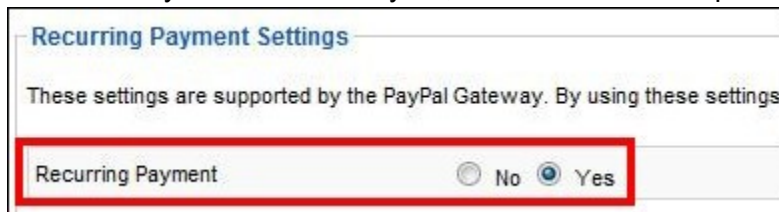


The screenshot shows the "One-Time Payment Settings" form. A red box highlights the "Use Different Price for Renewals?" section, which includes a radio button for "No" (unselected) and a radio button for "Yes" (selected). Below this, the "Renewal Price" is set to 13.00. Other fields include "Price" (19.00), "Use Coupon?" (No selected), "Coupon Code" (empty), "Coupon Price" (0.00), "Use Trial Period?" (Yes selected), and "Trial Price" (0.00). A red arrow points from the top text to the "Use Different Price for Renewals?" section.

## 6.7 Add recurring payments via PayPal

Path: **Joomla! backend panel >> Components >> RSMembership! >> Memberships >> Membership Information >> Recurring Payment Settings**

In RSMembership!, you can enable recurring payments - the user memberships will be automatically renewed via PayPal, each time a subscription expires.



The screenshot shows the "Recurring Payment Settings" form. A red box highlights the "Recurring Payment" section, which includes a radio button for "No" (unselected) and a radio button for "Yes" (selected). The text above the form states: "These settings are supported by the PayPal Gateway. By using these settings".

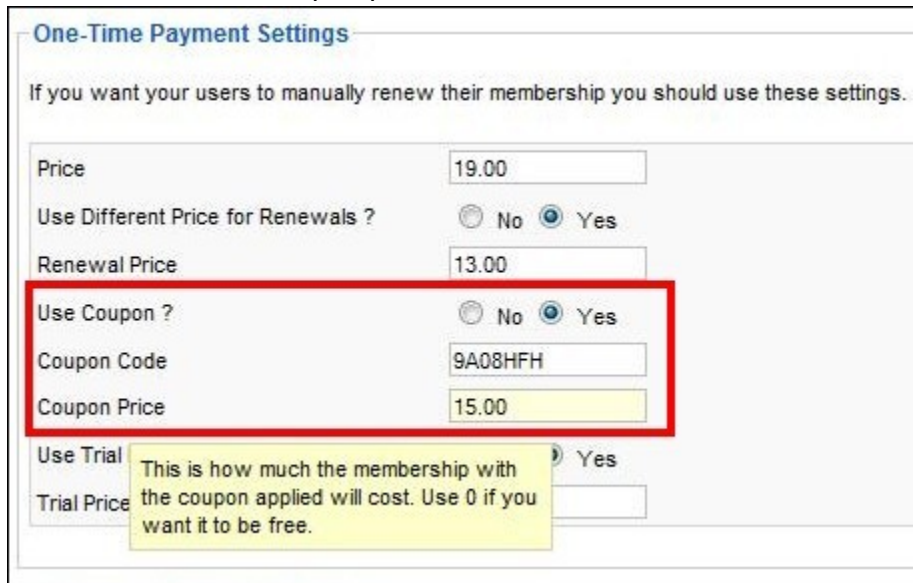
Recurring payments are easily configurable when editing a membership. In the "Membership Information" tab, below the WYSIWYG editor, head to the "**Recurring Payment Settings**" and activate the option.

## 6.8 Add membership discounts

Path: **Joomla! backend panel >> Components >> RSMembership! >> Memberships >> Membership Information >> One-Time Payment Settings**

Subscribers can purchase a membership with a discount if they add the coupon during the transaction.

First, enable the coupon option, then add the discount code that will be used by users during the transaction and the coupon price.



**One-Time Payment Settings**

If you want your users to manually renew their membership you should use these settings.

|                                    |   |
|------------------------------------|---|
| Price                              | <input type="text" value="19.00"/>                            |
| Use Different Price for Renewals ? | <input type="radio"/> No <input checked="" type="radio"/> Yes |
| Renewal Price                      | <input type="text" value="13.00"/>                            |
| Use Coupon ?                       | <input type="radio"/> No <input checked="" type="radio"/> Yes |
| Coupon Code                        | <input type="text" value="9A08HFH"/>                          |
| Coupon Price                       | <input type="text" value="15.00"/>                            |
| Use Trial                          | <input checked="" type="radio"/> Yes                          |
| Trial Price                        | <input type="text"/>  |

This is how much the membership with the coupon applied will cost. Use 0 if you want it to be free.

## 6.9 Upgrade from one membership to another

Path: **Joomla! backend panel >> Components >> RSMembership! >> Membership Upgrades**

Administrators can allow users to upgrade from one membership to another by configuring membership upgrades. Users will be able to view them as long as they are subscribed and there are available membership upgrades.

### Step 1:

In the RSMembership! component, head to “Membership Upgrades” tab and click on the “New” icon from the right panel.



### Step 2:

Select the membership for which you want to create upgrade; administrators can set price difference when migrating from one membership to another. Leave “0” when is no price difference.

Click “Apply” to save the changes.

Below you have a frontend view of the membership upgrade . Users will be able to see the available upgrades only if they are subscribed to respective membership.

The membership upgrades are displayed for each subscriber account, in the “My memberships” menu from the frontend - see [step 11.2 List user membership](#)

| Show user memberships |   |
|-----------------------|---|
| Membership:           | OK <input type="text" value="Cosmopolitan"/> <input type="button" value="Upgrade"/> |
| Membership Extra:     | Extra - Cosmopolitan Summer Guide 2010 <a href="#">Add this to your membership</a>  |
| Price:                | FREE!   |
| Status:               | Active  |

## Step 7: Add custom fields to your membership subscription form (optional)

The subscription process still relies on some core fields that can't be removed: *name* and *email*. This information is a key part in creating a user to assign the membership if required.

Besides the above mentioned fields you can now add as many fields you like, using the **Custom fields** tab. Adding or editing the already existing fields is an easy process - just click *New* or *Edit* and the field configuration will be displayed (as it can be seen below).

### Available options:

- **Custom Field Name:** the name of the actual field. This is used for internal reference only and it will not be displayed in the front-end.
- **Label:** the label/caption of the field - this value will be displayed on the front-end
- **Type:** Custom HTML (can be used add text or any HTML) / Text box / Text area / Select List / Multiple Select List / Checkbox Group / Radio Group / Calendar
- **Values (\*):** setting this area, in the case of text box, text area, custom HTML and calendar, will display a value by default in the frontend subscription form. In the case of select list, multiple select list, checkbox group and radio group, this area will actually define the items - each item on a new line.
- **Additional Attributes:** here you can add CSS properties or Javascripts
- **Required:** yes / no
- **Validation Message:** this message will be displayed if the field validation will fail
- **Published:** yes / no

The value of these fields can be used by using the placeholders. If, for example, you have a field named **test**, the correct placeholder would be: **{test}**.

The field placeholders can be used on the following areas: **Messages**, **Subscriber Emails** and **Administrator Email**.



#### Notice:

- After upgrading from a **previous version**, the previous fields will be transformed in custom fields - these can be removed at any time: *address, city, state, zip* and *country*.
- (\*) In the *Values* area **custom PHP coding** can be used, enclosed in between the following tags: `//<code>,//</code>`. Example (will add the current server date):
- `//<code>`
- `return date();`
- `//</code>`
- If you want to **translate** these **custom fields** in another language, just open the RSMembership! language file from `/languages/` and add the custom field's label in uppercase. For example: GENDER=Gender translation.

## Step 8: Add payment methods

The list with the installed payment methods you will find in the **Joomla! backend panel >> Components >> RSMembership! >> Payment Integrations tab**

By default, there is one payment method implemented in RSMembership! - the wire transfer

### 8.1 Wire transfer

Path: **Joomla! backend panel >> Extensions >> Plugin Manager >> System RSMembership! Wire Transfer.**

This is the default payment method used by RSMembership!

To add wire transfer details, head to "Plugin Manager" and edit the plugin parameters.

**Add wire transfer details:** add holder account details like account number, bank name and any other details needed to make the payment.

**Parameters**

▼ **Plugin Parameters**

Account Number: UG12AEB123456789123

Wire transfer details

(optional) Tax Type  Percent (%)  Fixed Rate

(optional) Tax Value

## 8.2 PayPal

### 8.2.1 Download the PayPal Payment plugin

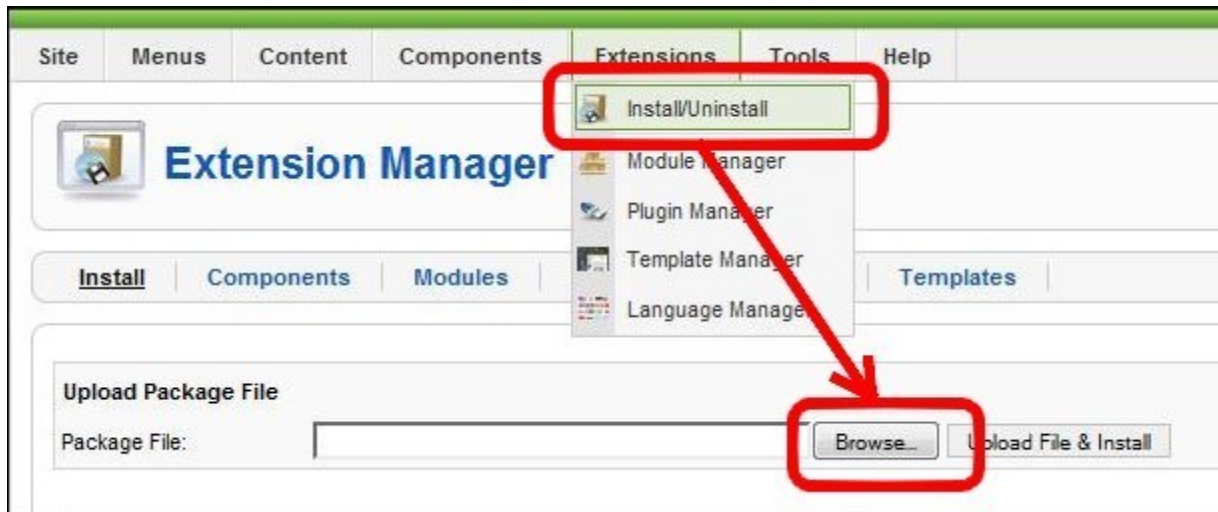
To download the PayPal plugin, login to your RSJoomla! account and head to **Resources >> Customer downloads >> Downloads >> RSMembership! Files >> Payment Plugins >> PayPal Payment Plugin**

| Customer Downloads |                                 |                           |                          |                     |           |        |
|--------------------|---------------------------------|---------------------------|--------------------------|---------------------|-----------|--------|
| #                  | Membership                      | Files                     | Licenses                 | Started             | Expires   | Status |
| 1                  | RSMembership! 1 Domain Lifetime | <a href="#">Downloads</a> | <a href="#">Licenses</a> | 01.09.2010 07:16:41 | Unlimited | Active |

### 8.2.2 Install the PayPal Payment plugin

The PayPal Payment plugin installs same as the component, through the default Joomla! installer.

In the Joomla! backend panel, head to **Extensions >> Install/Uninstall >> Browse the paypal.zip package and click on the "Upload File & Install"**



**Notice:**

- After installing the PayPal Plugin, make sure it's published in the Plugin Manager.

### 8.2.3 How to implement the PayPal payment method?

The “Payment Integrations” tab from RSMembership! offers only a list with the installed payments methods.

To configure the plugin, head to the “Plugin Manager” section, click on the **System RSMembership! PayPal** and edit the Parameters info.

**Add PayPal Email Address:** this is the seller’s PayPal account

**Choose the transaction mode:** use the Sandbox mode to test the transactions in the PayPal Sandbox. When you make test transactions, use the seller’s test account generated in your Sandbox account.

To generate PayPal test accounts, login to your sandbox account

<https://developer.paypal.com/> , from the user menu choose the “Test Accounts” option and create a buyer and a seller account for the test transactions.

Otherwise, enable the Live mode.

**Select tax options:** if you add membership taxes, you must choose the tax value and its type (percent or fixed rate).



Add a redirect URL for cancelled transactions:

| Parameters            |  |
|-----------------------|--|
| ▼ Plugin Parameters   |  |
| PayPal Email Address  | <input type="text" value="my-seller-account@yahoo.com"/>   |
| PayPal Mode           | <input checked="" type="radio"/> Test (sandbox) <input type="radio"/> Live   |
| (optional) Tax Type   | <input checked="" type="radio"/> Percent (%) <input type="radio"/> Fixed Rate  |
| (optional) Tax Value  | <input type="text" value="0"/>   |
| Cancelled Payment URL | <input type="text" value="www.mywebsite.com"/>   |
| Message               | <input checked="" type="radio"/> Standard "Membership purchase on date" Text <input type="radio"/> Membership's Name |



**Notice:**

- We recommend to test first the transactions using the **“Paypal Mode” - “Test”**

## 8.3 2Checkout

### 8.3.1 Download the RSMembership! 2CO plugin

To download the PayPal plugin, login to your RSJoomla! account and head to **Resources >> Customer downloads >> Downloads >> RSMembership! Files >> Payment Plugins >> 2Checkout Payment Plugin**

### 8.3.2 Install the RSMembership! 2CO plugin

The 2Checkout Payment plugin installs same as the component, trough the default Joomla! installer.

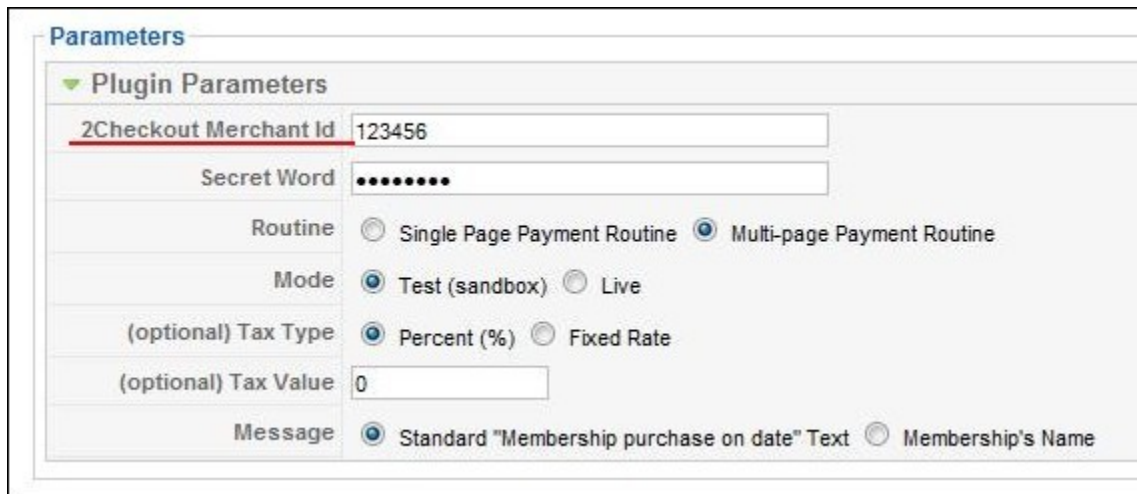
In the Joomla! backend panel, head to **Extensions >> Install/Uninstall >> Browse the 2checkout.zip package and click on the “Upload File & Install”**

### 8.3.3 How to implement the 2CO payment method?

To configure the 2Checkout Plugin, head to the “Plugin Manager”, click on the **System RSMembership! - 2Checkout** and edit Parameters information.

Here you will be able to set:

- 2Checkout Id - your business 2Checkout unique identification code
- Secret Word
- Routine - Single Page Payment Routine/Multi-page Payment Routine
- Mode - Test (sandbox)/Live



The screenshot shows the 'Parameters' section for the 2Checkout plugin. It includes the following fields and options:

- 2Checkout Merchant Id:** 123456
- Secret Word:** [Redacted]
- Routine:**  Single Page Payment Routine  Multi-page Payment Routine
- Mode:**  Test (sandbox)  Live
- (optional) Tax Type:**  Percent (%)  Fixed Rate
- (optional) Tax Value:** 0
- Message:**  Standard "Membership purchase on date" Text  Membership's Name

## Step 9: View subscribers

Path: **Joomla! backend panel >> Components >> RSMembership! >> Users**

Similar to the default Joomla User Manager area, **RSMembership!** has a built in membership *User Manager*. Here you can filter through them and have a general oversight of your membership users.

#### General View:

- User ID - id of the user
- Enabled - yes/no: if the membership has been approved
- Name - the name of the user
- E-mail - the email of the user

#### Edit View:

- User Information: general user information (editable)
- Memberships: subscribed memberships
- Transaction History: list of the transactions performed by the current user

- Access Logs: a list of the accessed content

Membership - Access a section

Membership - access a category

Active

Pending

Expired

Cancelled

| # | <input type="checkbox"/> | User ID | Enabled | Username | Name▲ |                      |
|---|--------------------------|---------|---------|----------|-------|----------------------|
| 2 | <input type="checkbox"/> | 65      | ✔       | name     | name  | name@email.com       |
| 3 | <input type="checkbox"/> | 63      | ✔       | steve    | Steve | steve_matt@ymail.com |
| 4 | <input type="checkbox"/> | 64      | ✘       | user     | user  | user@email.com       |

## Step 10: Manage transactions

Path: **Joomla! backend panel >> Components >> RSMembership! >> Transactions**

The **RSMembership! Transactions** tab offers a general view for present transactions.

By default the *Transactions* view displays:

- **Email** - user email used for completing the transaction
- **Type** - the transaction type: new, renew, upgrade, add extra
- **Date and time**
- **IP** - IP address used to purchase the membership
- **Price** - registered purchase price
- **Status** - completed/pending
- **Gateway** - payment gateway that was used to complete the purchase
- **Transaction Hash** - unique order id (specific for payment gateways)

| IP        | Price     | Coupon Code | Status    | Gateway       | Transaction Hash |
|-----------|-----------|-------------|-----------|---------------|------------------|
| 127.0.0.1 | 10.00 EUR | No coupon   | completed | Wire Transfer | No hash          |
| 127.0.0.1 | 10.00 EUR | No coupon   | completed | Wire Transfer | No hash          |
| 127.0.0.1 | 10.00 EUR | No coupon   | completed | Wire Transfer | No hash          |



**Notice:**

- If the membership **Activation** option (configurable on the *“Memberships” tab >> Stock and Activation >> Activation - see [step 6.4.3: Add stock info and the activation method](#)*) is configured to *Manual*, the purchase transactions have to be manually approved: select transaction and click on the *Approve* button.

## Step 11: Show memberships in frontend

### 11.1 Display a list with the available memberships

**Step 1:**

To list all available memberships in frontend, head to the *Joomla! backend panel >> Menus >> Menu Manager >> Main Menu* and click on the right icon to edit.

| # |                       | Title     | Type     | Menu Item(s)      | # Published |
|---|-----------------------|-----------|----------|-------------------|-------------|
| 1 | <input type="radio"/> | Main Menu | mainmenu |                   | 3           |
| 2 | <input type="radio"/> | User Menu | usermenu | Edit Menu Item(s) |             |

**Step 2:**

In the “Menu Item Manager”, click on the “New” icon from the right side of the panel.

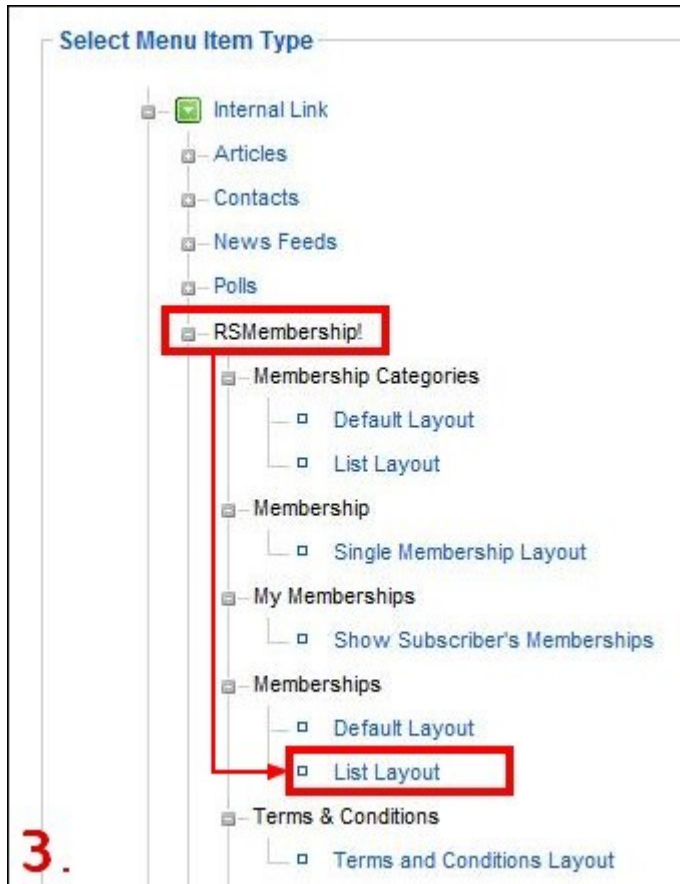
Menu Item Manager: [mainmenu]

Go Reset Max Levels 10 - Select State -

| Menu Item | Type                  | ItemID |
|-----------|-----------------------|--------|
| Home      | Articles » Front Page | 1      |

**Step 3:**

In the “Internal link” menu, select **RSMembership! >> Memberships >> List Layout**.



**Step 4,5:**

Edit Menu item details and Parameters information.

**Menu Item Details**

Title: List memberships in frontend

Alias:

Link: index.php?option=com\_rsmembership&view=rsmembership

Display in: Main Menu

Parent Item:
 

- Top
- Home
- Joomla! Overview
- What's New in 1.5?
- Joomla! License
- More about Joomla!
- FAQ
- The News
- Web Links
- News Feeds

Published:  No  Yes

Order: New Menu Items default to the last position. Ordering Menu Item is saved.

**4.**

**Parameters (Basic)**

Categories: No category, Emails, articles

Show Category?  Hide  Show

Table Headings  Hide  Show

Pagination: Show

Primary Order: Default

**5** Parameters (System)

## 11.2 List user membership

### Step 1:

To list user memberships in frontend, head to **Joomla! backend panel >> Menus >> Menu Manager >> Main Menu** and click on the right icon to edit.

**Menu Manager**

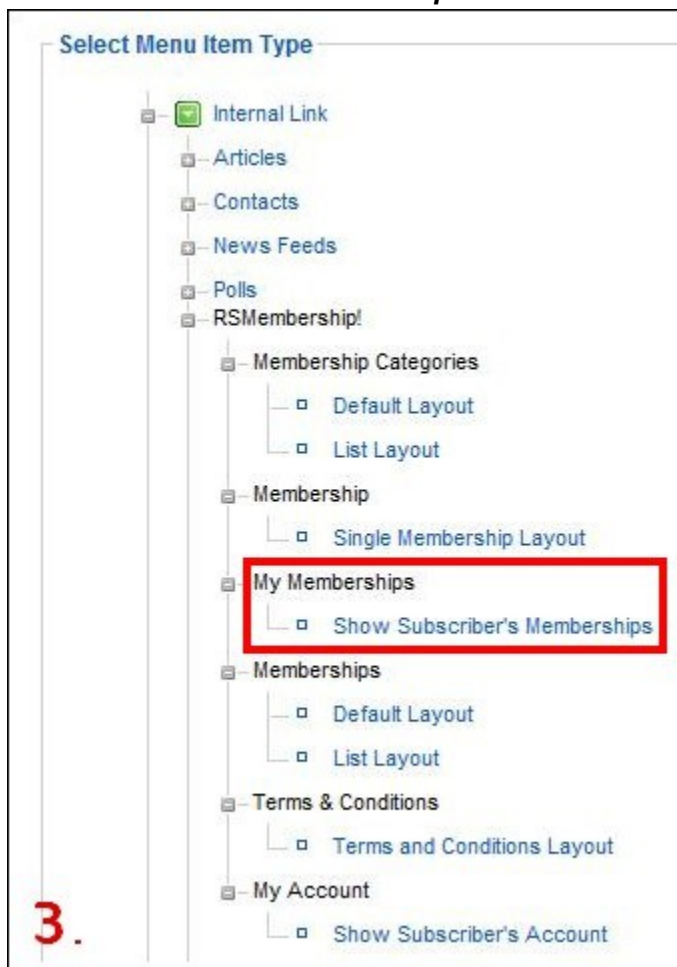
| #           |                       | Title     | Type     | Menu Item(s)      | # Published |
|-------------|-----------------------|-----------|----------|-------------------|-------------|
| 1           | <input type="radio"/> | Main Menu | mainmenu |                   | 3           |
| <b>1.</b> 2 | <input type="radio"/> | User Menu | usermenu | Edit Menu Item(s) |             |

**Step 2:** In the “Menu Item Manager”, click on the “New” icon from the right side of the panel.



**Step 3:**

In the “Internal link” menu, select ***RSMembership! >> Memberships >> My memberships >> Show Subscriber’s Memberships***



Besides user memberships, administrators can list renewal, extras and upgrades memberships.

## 11.2.1 Renewal memberships

Path: **Joomla! backend panel >> Components >> RSMembership! >> Membership >> Membership Information**

Subscribers can renew their expired memberships, by using the “Renew” link available in frontend.

An expiration notification email is sent each time a membership is about to expire, before a preconfigured amount of time (**e.g.** 3 days before membership expiration date).

The expiration notification email can be configured in the Subscriber’s Email – see [step 6.4.7.1 Subscriber’s email](#).

### One-Time Payment Settings

If you want your users to manually renew their membership you should use these settings.

|                                    |   |
|------------------------------------|---|
| Price                              | <input type="text" value="19.00"/>                            |
| Use Different Price for Renewals ? | <input type="radio"/> No <input checked="" type="radio"/> Yes |
| Renewal Price                      | <input type="text" value="13.00"/>                            |
| Use Coupon ?                       | <input checked="" type="radio"/> No <input type="radio"/> Yes |
| Coupon Code                        | <input type="text"/>  |
| Coupon Price                       | <input type="text" value="0.00"/>                             |
| Use Trial Period ?                 | <input checked="" type="radio"/> No <input type="radio"/> Yes |
| Trial Price                        | <input type="text" value="0.00"/>                             |

In frontend, you should have something like this:

### Show user memberships

|             |  |
|-------------|--|
| Membership: | Cosmopolitan<br>Extra - Cosmopolitan Fashion Guide 2010, Extra - |
| Price:      | 24.00 EUR  |
| Status:     | <b>Expired Renew</b>   |
| Started:    | 09.09.2010 (12:44:56)  |
| Expires:    | 09.09.2010 (12:13:40)  |

For now, you cannot access any files because your membership's status is "Expired".



## 11.2.2 List membership extras

### Step 1:

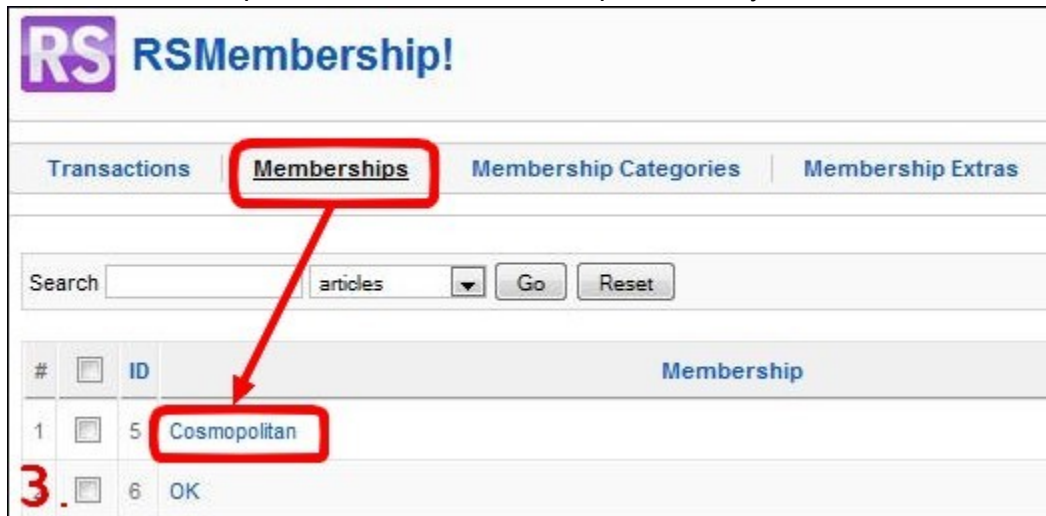
Before listing membership extras in frontend, you need to create first a menu link to list all memberships - see [Step 11.1 Display a list with the available memberships](#)

### Step 2:

Create membership extras - see [Step 6.2 Add membership extras](#)

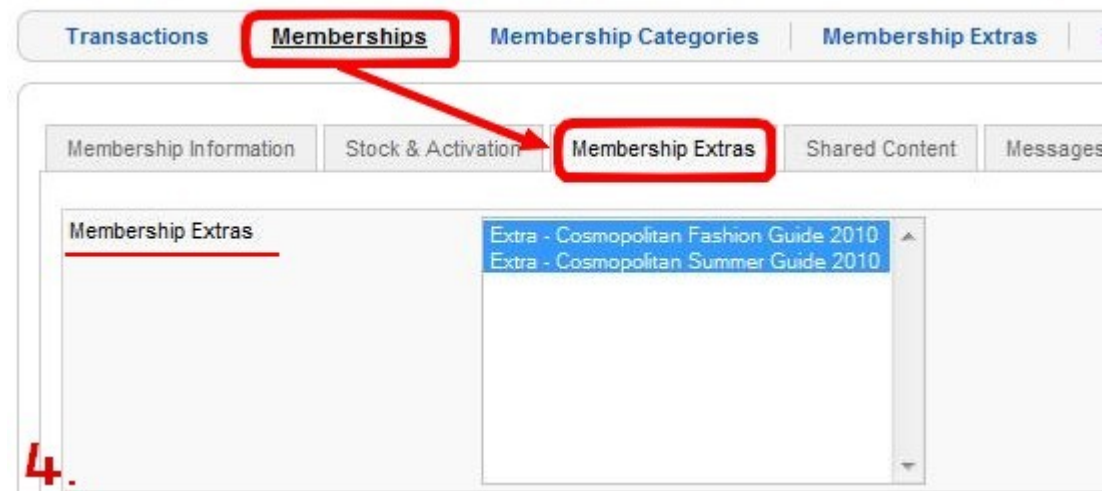
### Step 3: Assign membership extras

In the “Memberships” tab, edit the membership for which you want to add extras.



### Step 4: Select extras

Click on the “Membership Extras” tab and select the extras that you want to assign to your membership.



In frontend, you should have something like this:

**Cosmopolitan**  
Read Cosmopolitan

**Extra - Cosmopolitan Fashion Guide 2010**

Extra - Cosmopolitan Fashion Guide 2010 - 2.00 EUR  
**Extra - Cosmopolitan Summer Guide 2010**

Extra - Cosmopolitan Summer Guide 2010 - 3.00 EUR  
Price: 19.00 EUR

Click here to

### 11.2.3 List Upgrades

Administrators can create membership upgrades to allow users to migrate from one membership to another, paying the price difference (if any configured).

When accessing their account, users will see in the “My memberships” menu link the available upgrades - see [step 6.9 Upgrade from one membership to another](#).

## The purpose of this guide

This guide is designed to assist you, step by step, in configuring and creating a Joomla! membership website with the [RSMembership!](#) component.

We've also created a RSMembership! Quick Guide, that includes all important steps that you must follow to quickly setup the membership site.

Additionally, we've launched the [RSJoomla! TV Channel](#) to support our components with a series of video tutorials and presentations.

The RSMembership! Documentation can be found [here](#).

For any other questions, please submit a ticket to the [RSJoomla! support department](#).