

iMember360 Configuration Notes

1. Create tags and test content

Create one tag per level you want to create. Each tag has to have a corresponding tag with PAYF as the last four characters. There can be no space before the “P” in “PAYF.” (“PAYF stands for Payment Failed.)

Note: For illustration, let’s use the name “Level 1” for the membership level.

2. Create the InfusionSoft custom field where we will store the iMember360 password. I recommend creating custom field called iMember360Password and have it show in a heading called iMember360 Fields as the first tab and fields in the Custom Field tab.
3. Create a welcome email template.
 - a. Use plain text so you maximize the delivery.
 - b. The email must include the URL where they can login to get the product, userid, and password.
 - c. Grab the URL from the Wordpress website where users can login and include that in the template.
 - d. The userid is the email address so use a merge field for that one.
 - e. The password is stored in custom field iMemberPassword.
4. Create a campaign that will executed when people sign up and/or purchase the program. I call it “iMember360 Registered for Level 1.” To start with, I add two things which help a bit.
 - a. Define a goal tag in the Campaign that is the iMember360 membership tag category. When contacts are assign to the level, this campaign executes.
 - b. Sets a timer with 999 days. This keep everyone assigned to the Campaign until we decide later what I want them to do next.
5. Create an action set that will be creating the user password. I call it “iMember360 Generate Password Action Set.”
 - a. You create actions sets in Marketing -> Settings -> Action Sets
 - b. You need to call the iMember360 on the site so it generates a password. You do this by creating a Send HTTP Post to the site using the following format:
?i4w_genpass=(First 6 chars of InfusionSoft application key)

Your application key is found at Admin -> Settings -> Application.

An example is:

http://members.larryjacob.com/?i4w_genpass=xxxxxx

6. Create an action set for new members purchasing the product. I call "iMember360 Register for Level 1"
 - a. Add the "Level 1" course tag.
 - b. Call the action set to create the password
 - c. Run the follow up sequence for new member which sends out the email with the login information (Because you are sending this email out from an Action Set, it will go out immediately. Sending it from a Campaign or Follow Up Sequence can take long enough for people to think something went wrong..)

7. Create the products and related triggers that will be controlled by iMember360. We are going to keep this simple at first assuming people are going to pay for a product and have access to it indefinitely.
 - a. Create the product.
 - b. Under E-Commerce / Settings, go to Billing Automation and create two triggers for each product.
 - c. First Trigger is for a successful charge attempt.
 - i. Select "When an autocharge attempt is made" and click on "Add Trigger."
 - ii. Select "Is Successful" and "Failed or didn't fail."
 - iii. Select the product associated with the membership level from the list box.
 - iv. Add two actions. You add the "Level 1" tag and remove the "Level 1PAYF" tag. (Remember: No spaces before the "P" in "PAYF.")
 - v. Add the Action Set "iMember360 Register for Level 1."
 - d. Second Trigger is for a failed charge attempt.
 - i. Select "When an autocharge attempt is made" and click on "Add Trigger."
 - ii. Select "Fails." For subscription products, you have the option of trying their credit card a few times and only pulling them out of the membership after the card has failed a few times. I don't get into that here.

- iii. Select the product associated with the membership level from the list box.
 - iv. Add two actions. You add the “Level1PAYF” tag and remove the “Level1” tag.
- 8. I find it convenient to have a way to quickly assign people to a membership level so I create a web form call “Level 1 Free Sign Up.”
 - a. Take the web form design they give you. You only need the first name and email.
 - b. In the Actions page, use the Run Another Action Set option in the first drop down and select “iMembership Register for Level 1.”
 - c. Test this form.
- 9. Create an order form that charges the appropriate amount and calls action set “iMembership Register for Level 1.”
- 10. Install the iMember360 plugin and configure it with the InfusionSoft API.
- 11. Set permalinks to `/%postname%/`
- 12. Create a simple My Account page and / or sidebar you can use for testing. You’ll get as elaborate as you like afterwards, but below are some basic notes to get you started.
 - i. Create a page with the following code on it:

```
[i4w_is_logged_in]
  <h1>Welcome Back [i4w_db_FirstName]! We're glad you're here.</h1>
  <h3>You Can Change Your Password Here</h3>
[i4w_password_change]
  <h3><strong>Currently you have the following membership levels...</strong></h3>
  [i4w_user_levels] <br /> <br />
  <h3>You Can Update Your Profile or Payment Information Below</h3>
[i4w_clientlogin]
[ELSE_is_logged_in]
  [i4w_minilogin layout='v' user='Email'
  redir='#use_level_redir#'] [/i4w_is_logged_in]
```

- j. Add a widget to the page so people can login. If not, create a new page where people can login.

- k. Create a shopping cart product or order page where people can purchase the membership level for the product you are selling.
13. Got to iMember360 Plugin Options and set the following:
- a. Login page is My Account
 - b. Registration page is the page where you list out all your membership levels.
 - c. Select the password level custom field that will be used.