

Welcome to WP SalesAutomator!

Thank you for purchasing the WP SalesAutomator plugin.

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Plugin Requirements

The plugin requires the following enabled on the server:

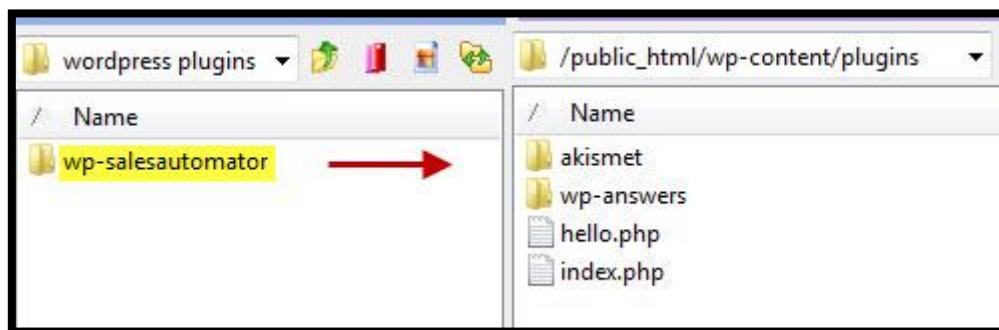
- PHP5

Installation

The install is very simple and if you have installed wordpress plugins before, it's exactly the same. You may have your own preferred method, I like to use good old FTP, I'll give a quick overview of the 2 most common...

FTP

Extract the zip file to your hard drive, and you should have a folder named 'wp-salesautomator'. Then via your ftp client upload to the plugins folder.

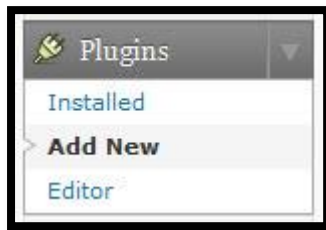


Once uploaded, login to your WP admin area to activate.

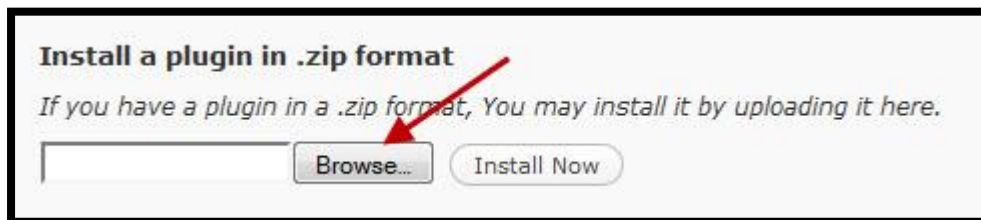


Wordpress upload

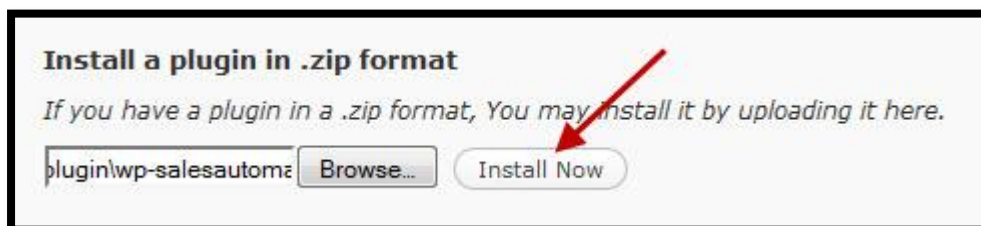
Or if you prefer you can also upload the plugin using the wordpress built-in upload function...



Now instead of extracting the zip file to your computer, you simply click the browse button and select the zip file on your computer and wordpress will upload and extract the plugin folder automatically.



Once the zip file is selected, click the install now button.



If the upload is successful, you can now activate like so:



Once the plugin has been activated, you will have a new menu link:



Configuration

After activating the plugin, we have a few simply settings to complete.



WPSA Configuration

PayPal Configuration

Use PayPal Sandbox	1	<input type="checkbox"/>	Testing purpose only.
Your PayPal Email Address	2	<input type="text" value="paypal@ninemarketing.com"/>	Paypal email address through which you will receive payments.
Currency Code	3	<input type="text" value="USD"/>	The currency code for the payment amount. Example: USD
Display Recurring Payment Option	4	<input type="checkbox"/>	
Subscription Button Image	5	<input type="text"/>	Add the image URL to replace the default Subscription button. Leave it blank if you want to use default button.
Buy Now Button Image	6	<input type="text"/>	Add the image URL to replace the default Buy Now button. Leave it blank if you want to use default button.

Update Options »

1. If you want to use the paypal sandbox for testing before going live, you need a developer account before you can use this option.
2. Enter your paypal email to accept the payments.

3. The default currency is USD, and sales are in dollars, but you can change to your own currency if you wish.

Currency	Value	Currency	Value
Australian Dollars (A \$)	AUD	Polish Zloty	PLN
Canadian Dollars (C \$)	CAD	Norwegian Krone	NOK
Euros (€)	EUR	Hungarian Forint	HUF
Pounds Sterling (£)	GBP	Czech Koruna	CZK
Yen (¥)	JPY	Israeli Shekel	ILS
U.S. Dollars (\$)	USD	Mexican Peso	MXN
New Zealand Dollar (\$)	NZD	Brazilian Real (only for Brazilian users)	BRL
Swiss Franc	CHF	Malaysian Ringgits (only for Malaysian users)	MYR
Hong Kong Dollar (\$)	HKD	Philippine Pesos	PHP
Singapore Dollar (\$)	SGD	Taiwan New Dollars	TWD
Swedish Krona	SEK	Thai Baht	THB
Danish Krone	DKK		

4. Displays the recurring payment option

members sign-up

Name	Description	Amount	Duration
<input type="radio"/> test_sub	test subscription	12	1 Week(s)

Enable Recurring Payments ☒ Yes ☐ No

Subscribe



5. If you want to use your own custom subscription button, simply enter the url to the image.
6. Same as the subscription button option but for the normal product sales payment button.

Once you completed the settings, click the update button to save the changes.

Onto the next settings...

Error Messages

Error Messages

For Registered-user content
HTML is allowed

Login/Register for more.

*This message will appear when content being accessed are for registered user.
This message will follow login/register link.*

For Premium-user content
HTML is allowed

We're sorry. You do not have access to this area.

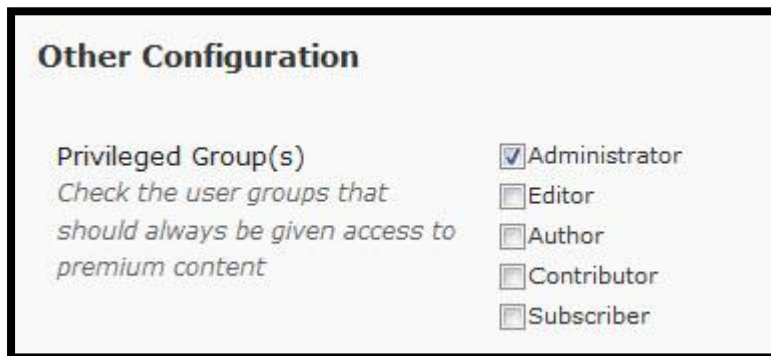
*This message will appear when content being accessed are for premium user.
The message will follow link to subscription form.*

Update Options »

These display 2 messages, typically for normal users who access your blog that are not registered or logged in.

Other Configuration

First part is:



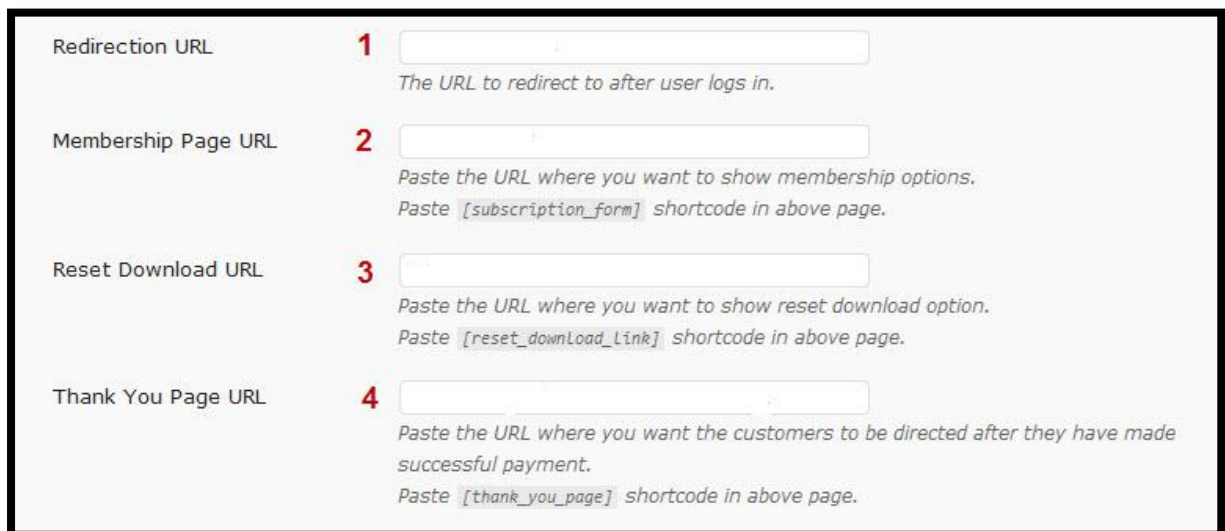
Other Configuration

Privileged Group(s)
Check the user groups that should always be given access to premium content

☒ Administrator
☐ Editor
☐ Author
☐ Contributor
☐ Subscriber

Privileged groups - if you have premium content for a subscription. This displays the default WP Roles. Select who gets access, administrator is you, so you can access the content pages to check everything is setup correctly for members.

Also you want to select any of the others if you have people who help with the content you provide. The subscriber option can be ignored, unless you want all registered (free) users to also get access to the paid content.



1 Redirection URL
The URL to redirect to after user logs in.

2 Membership Page URL
*Paste the URL where you want to show membership options.
Paste [subscription_form] shortcode in above page.*

3 Reset Download URL
*Paste the URL where you want to show reset download option.
Paste [reset_download_Link] shortcode in above page.*

4 Thank You Page URL
*Paste the URL where you want the customers to be directed after they have made successful payment.
Paste [thank_you_page] shortcode in above page.*

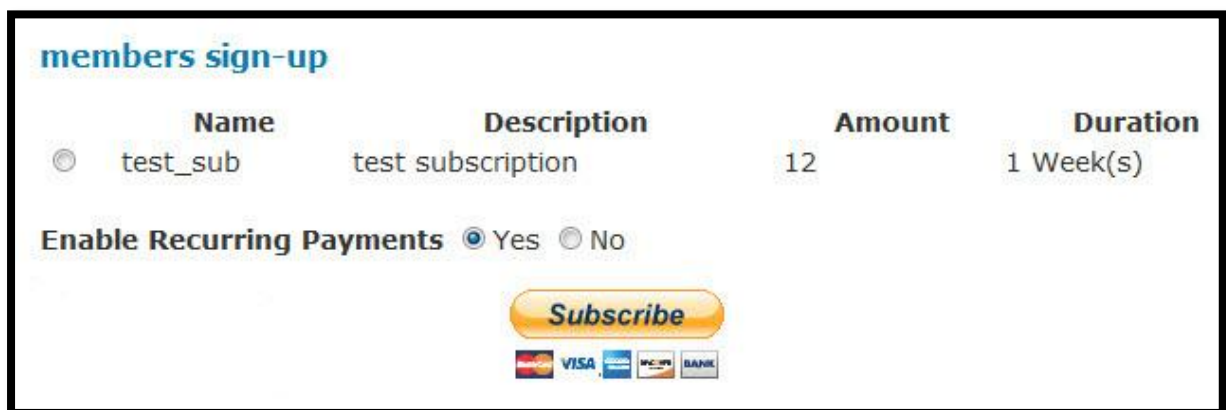
- 1. Redirection URL** - A simple function but makes it a better experience for the subscriber. Normally wordpress when someone logs in they arrive at the profile page, so then they have to try and find their own way to the actual content. Sounds easy but is a little annoying!

So you can enter the url for the main members post or category, and they will automatically be redirected after they login.

2. **Membership Page URL** - First create a post or page for example '**Members Sign-up**' and add details for the subscription, including the tag below:

[subscription_form]

This will display the signup details for the subscription within the post/page when the above tag is added:



Name	Description	Amount	Duration
<input type="radio"/> test_sub	test subscription	12	1 Week(s)

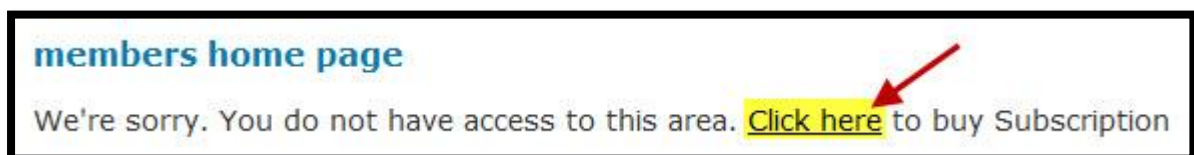
Enable Recurring Payments ☒ Yes ☐ No

[Subscribe](#)

Mastercard VISA American Express Discover Bank of America

The URL you enter into the '**Membership Page URL**' box will be used for non subscribers who access any premium content posts/pages. It will display the message from the '**error messages**' settings and the url link to the membership page.

Here's a post I created 'members home page', when a normal visitor to the blog tries to access, they cannot view the premium content. And are shown the error message with the link to the membership page url (the post with the [subscription_form] tag).



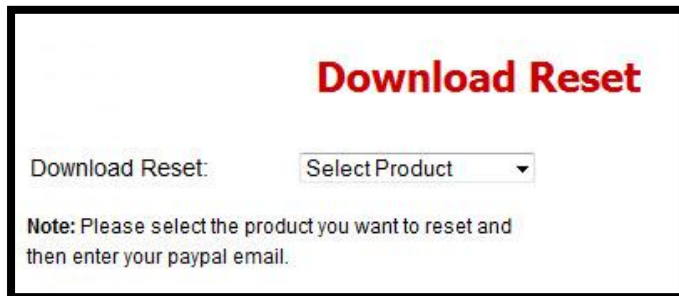
members home page

We're sorry. You do not have access to this area. [Click here](#) to buy Subscription

- 3. Reset Download URL** - First create a post or page for example '**Download Reset**' and add the tag below:

[reset_download_link]

This will display the download reset option within the post/page when the above tag is added:



- 4. Thank You Page URL** - First create a post or page for example '**Thank You**' and add the tag below

[thank_you_page]

This is the page the customers are redirected back to after they have completed the payment. This is for both normal product sales and subscriptions.

Don't worry about the product download links, they are only displayed after a customer purchases. So any non-customers access the post will not get access to the product download links.

I recommend these 2 plugins which gives the option to hide 'pages' from the navigation:

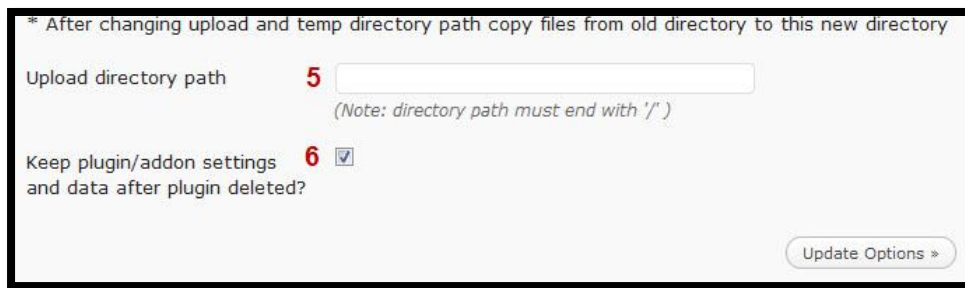
<http://wordpress.org/extend/plugins/exclude-pages/>

And hide 'posts/pages' throughout the blog, such as the home page, search results, category pages etc:

<http://anappleaday.konceptus.net/posts/wp-hide-post/>

Once these are activated it will have the options on the 'add new' post/page admin pages (right sidemenu).

Next we have these last 2 settings:



* After changing upload and temp directory path copy files from old directory to this new directory

Upload directory path **5**
(Note: directory path must end with '/')

Keep plugin/addon settings and data after plugin deleted? **6** ☒

Update Options »

- 5. Upload Directory Path** - The plugin does have a default directory to store the product files. But you can enter a custom option to make it safer.
- 6. Plugin/addon settings & data** - Check this option so if at any time you delete the plugin it does not also delete the database data.

When first installing the plugin it will display a default, which will be something like:

```
/home/ACCOUNT_NAME/public_html/wp-content/uploads/salesautomator/uploads/
```

Notice at the start and end has a: **/**

They must be present for the plugin to find the files. And when entering a custom directory, in most cases you only need to edit the part in yellow, making sure to add the **/** at the end:

```
/home/ACCOUNT_NAME/public_html/wp-content/uploads/salesautomator/uploads/
```

Once you have completed the 'other configuration' details, click the **update button** to save.

Validity of Download Link

Note: Download Link will expire after whichever limit first met from following limits.

Time Limit
(Download Link will expire after this duration.)

2 Days 10 Hours (Minimum 10 Hours)

Max Count Limit
(Download Link will expire after this many number of downloads.)

3 (Minimum 1)

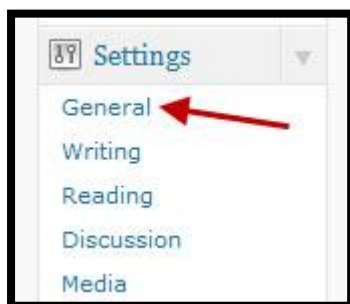
Update Options »

Time Limit - As it states, the download link will expire after this duration

Max count Limit - Or it will expire after X downloads.

One last setting...

Now the plugin settings are setup, we need to complete one final option in the wordpress default general settings page.



Make sure the 'membership: Anyone can register' option is checked.

Manage Products

Product Sales

Now the basic settings are completed, we can go through the details how to add products to sell and also add to a post or page. Then onto the membership side.



First click the 'Add Product' link, and we can setup a product.

A screenshot of a web form titled "WPSA Product Details". At the top, there are two links: "List Product" and "Add Product". The form contains several input fields: "Name (required)" with the value "Test Product", "Description (optional)" with the value "short description", and "Price (USD) (required)" with the value "27". Below these is a section for uploading a product file, which is highlighted with a red box. It includes a radio button for "Upload Product", a "File (required)" label, and two "Browse..." buttons. Red arrows point from the "File" label to the first "Browse..." button and from the "Upload Product" radio button to the second "Browse..." button. Below this section is a green box labeled "OR" containing a "Select File" radio button and a list of files: "filename3.zip" (checked), "filename1.gif" (checked), and "filename2.txt" (unchecked). Green arrows point from the "Select File" radio button to each of the three file entries.

Next we add the name of the product, an optional short description and price.

Then you can either browse your computer to upload the product file(s) or if the file(s) are large, you can upload via ftp and then select from the list which displays all the available files from the download directory.

Next we have the email Message template.

Enter your email, probably a good idea to use an address the same as the blog domain. But of course use whatever email you prefer.

Enter your name, and also the email subject.

Customize Download Link Email Notification

From Email Address

you@yourdomain.com

From Name

Your blog

Subject
[for download link]

[Your blog] Download Link

We then have the actual email message template, you have a few 'keys' which to use. The main ones being the %download_link% and the %product_name%. All are optional, and the default is perfectly ok to use but customise for that personal touch.

Message Template
[for download link only]

Replacement Keys: %user_email% %blogname% %product_name%
%download_link% %description% %price% %first_name% %last_name%
%register_link%

Hi %first_name%,

Thank you for purchasing our product %product_name%

Download link is given below:

%download_link%

Finally we have the template for the 'thank you' page. Which is displayed after completing payment and redirected back to the blog.

Customize Thank You Message

Message Template
[for Thank You Page only]

Replacement Keys: %user_email% %blogname% %product_name%
%download_link% %description% %price% %first_name% %last_name%
%register_link%

Thank you for purchasing %first_name%.

Please find below your download link(s):

%product_name%

%download_link%

=====

Once you have entered the details click the 'save' button. If it was added successfully you should see this message.

File is valid, and was successfully uploaded.

Click the 'list products' link to view the current products setup.



Name	Description	Price	Edit	Delete	Short Code
test product 1	Short description of product	\$10			[product_listing pid="1"]
test product 2	Short description	\$27			[product_listing pid="2"]

As you can see, it details the name, description price etc. Plus also the option to edit and delete completely.

The 'short code' is the tag that is required to be entered into a post or page to display the product for sale. Now you can do this manually or a really simply way is using the button added to the editor.



When you want to add the product(s) shortcode simply click the \$ icon and a new box will appear. Then click on the checkbox(s) for each product you want to add.



When you select the products and click insert, it will generate the shortcode in the post or page in this format:

```
[product_listing pid='1,4']
```

Product List (front-end)

Once you have added the products to a post, the visitor has the option to select one or more and the price will auto update the total cost, the visitor then clicks the payment button and is redirected to paypal to complete the transaction.

test post

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur tellus lorem, sollicitudin vitae mattis et, interdum ut justo. Nam ultricies laoreet ultrices. Mauris faucibus accumsan condimentum. Quisque ac orci massa, sed vulputate arcu.

	Product	Price	Description
<input checked="" type="checkbox"/>	test product 1	\$10	Short description of product
<input type="checkbox"/>	test product 2	\$27	Short description

Total Price : **\$10**

Buy Now

Product Sales Log

Go to the 'product sales log' page to view the different product sales, transactions, customer name/email, IP address, referral etc.

Manage Subscriptions

Subscription list

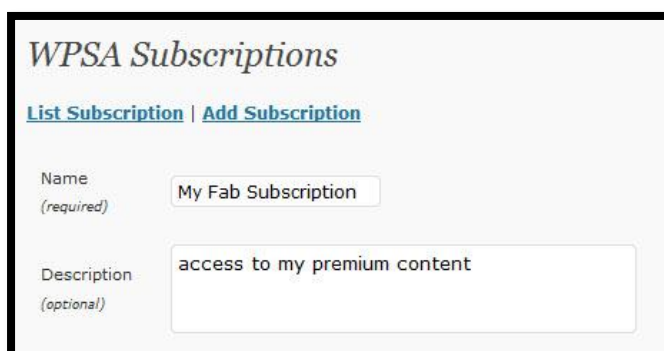
On the 'Manage Subscriptions' page you can add/edit/delete subscriptions.



The screenshot shows the 'Manage Subscription' page with a header bar containing 'List Subscription' and 'Add Subscription' links. Below is a table with columns: Name, Description, Amount, Duration, Edit, and Delete. Two test subscriptions are listed.

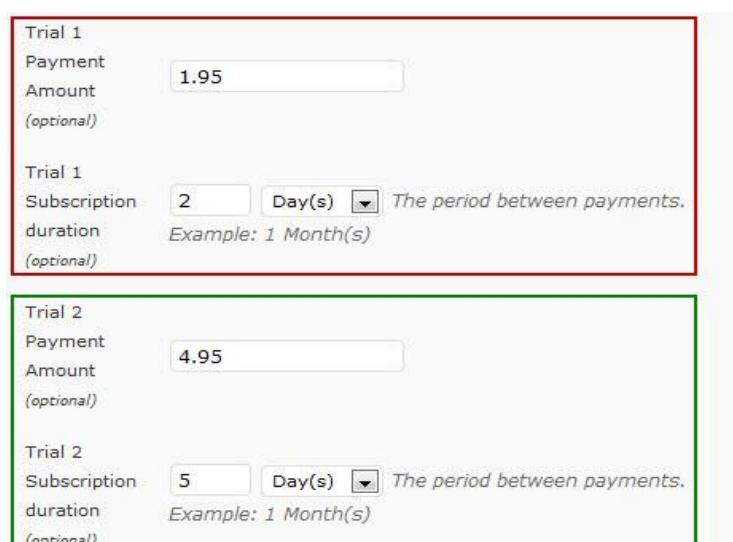
Name	Description	Amount	Duration	Edit	Delete
Test 1	test subscription 1	12	1 Year(s)		
Test 2	test subscription 2	24	24 Month(s)		

To add a subscription simply click the 'Add Subscription' link, and enter the various details, we first have the name and the optional description:



The screenshot shows the 'WPSA Subscriptions' form. It has two links: 'List Subscription' and 'Add Subscription'. The 'Name' field is required and contains 'My Fab Subscription'. The 'Description' field is optional and contains 'access to my premium content'.

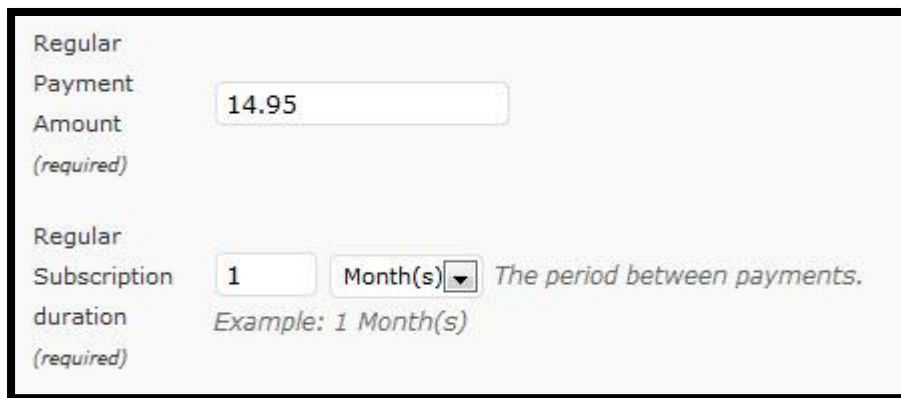
Then we have the optional 2 trial periods, you can use both or just one to keep things simple for the customer.



The screenshot shows the trial periods section of the subscription form. It is divided into two sections: Trial 1 and Trial 2. Trial 1 has a payment amount of 1.95 and a subscription duration of 2 days. Trial 2 has a payment amount of 4.95 and a subscription duration of 5 days. Both trial periods are optional.

Trial 1	Trial 2
Payment Amount (optional)	Payment Amount (optional)
1.95	4.95
Subscription duration (optional)	Subscription duration (optional)
2 Day(s)	5 Day(s)
The period between payments. Example: 1 Month(s)	The period between payments. Example: 1 Month(s)

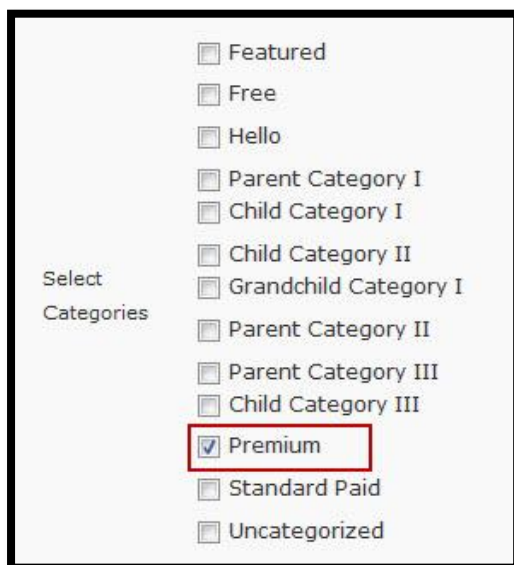
Next is the required 'regular' subscription payment.



Regular
Payment
Amount
(required)

Regular
Subscription duration *The period between payments.*
Example: 1 Month(s)
(required)

We can setup multiple membership levels, simply by selecting one or multiple categories for a specific subscription. Any categories setup in wordpress are displayed and available when adding a new subscription.



Select
Categories

- ☐ Featured
- ☐ Free
- ☐ Hello
- ☐ Parent Category I
- ☐ Child Category I
- ☐ Child Category II
- ☐ Grandchild Category I
- ☐ Parent Category II
- ☐ Parent Category III
- ☐ Child Category III
- ☒ Premium
- ☐ Standard Paid
- ☐ Uncategorized

Click the 'save subscription' button and we are finished adding our subscription.

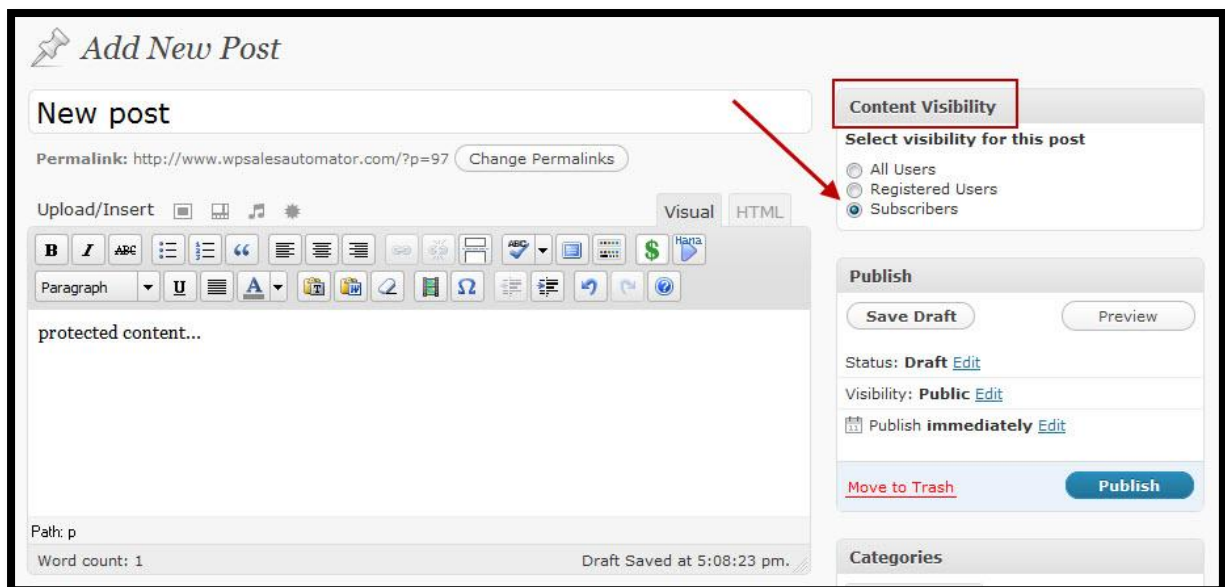
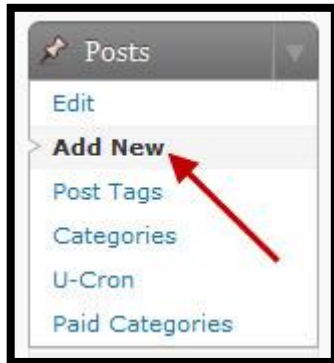


Save Subscription

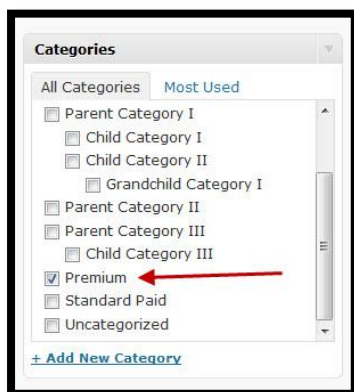
If you need to update a subscription, click the edit icon, or if it's no longer required you can delete it.

Protecting Posts & Pages

When adding a new post or page, we add the content as normal and select one option to protect it under the “content visibility” menu.



After clicking the publish button, the post will be live and because we selected “subscribers” radio button, only members with active subscriptions will be able to access the post content.



Not forgetting which posts are for which membership level, and selecting the appropriate categories.

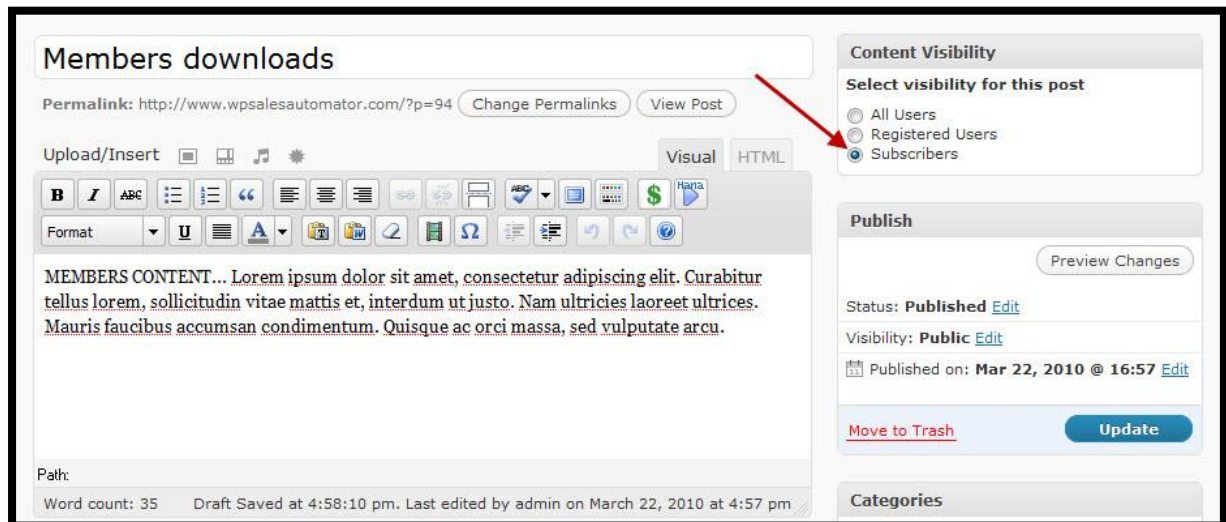
Please note: when you logged in to the blog admin area, you can only access the post, just like a member IF you have updated the option on the plugin settings page:

A screenshot of the 'Other Configuration' settings page. The page has a title 'Other Configuration' and a red arrow pointing to it. Below the title, there is a section titled 'Privileged Group(s)' with a red box around it. The text below this section says 'Check the user groups that should always be given access to premium content'. To the right of this text, there are five checkboxes: 'Administrator' (checked), 'Editor', 'Author', 'Contributor', and 'Subscriber'. Below this, there are three text input fields: 'Redirection URL', 'Membership Page URL', and 'Reset Download URL'. Each field has a description below it: 'The URL to redirect to after user logs in.', 'Paste the URL where you want to show membership options. Paste [subscription_form] shortcode in above page.', and 'Paste the URL where you want to show reset download option. Paste [reset_download_Link] shortcode in above page.' At the bottom left, there is a button labeled 'Update Options »'.

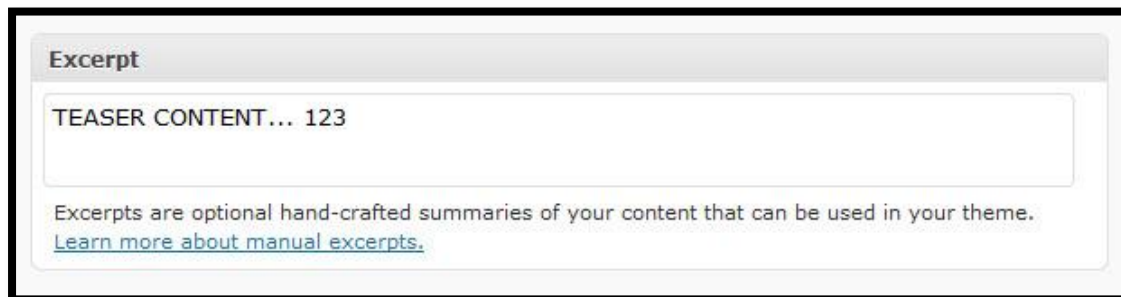
Teaser Content

This is a great way to show potential members what you provide in your membership. It's really easy to do...

On a post or page, add your members content as normal:



Then in the excerpt box, simple enter the content you want to display to non-members. One important thing to remember IF you do not enter any content into the excerpt by default the plugin will display the first 20 characters from the main post/page content.



The teaser content is shown on the blog home page (unless you have a static home page setup), it's also displayed on the category page and if a visitor uses the search function.



But when directly accessing the protected post/page, any non-members will see the signup link.

Upgrading

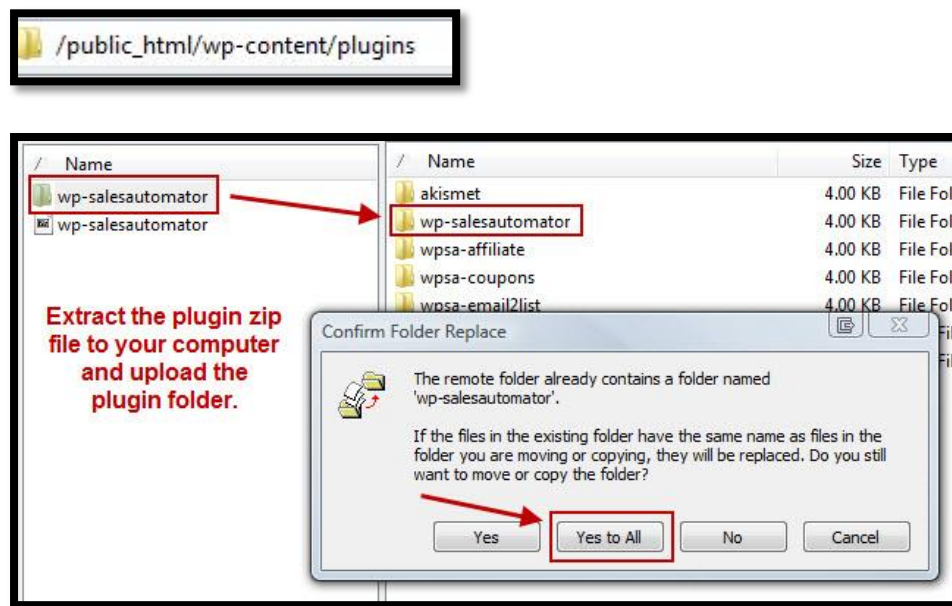
The upgrade is an easy process...

2 options - either using ftp or the wordpress plugin upload function.

FTP Option

First deactivate the current version in your wordpress dashboard, then unzip and upload the new version to the plugins folder via ftp.

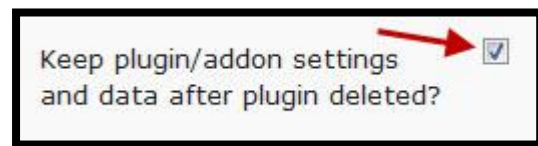
Login to ftp and navigate to the 'plugins' folder:



Go back into your blog dashboard and activate the plugin again. Upgrade is now completed.

Wordpress Upload Option

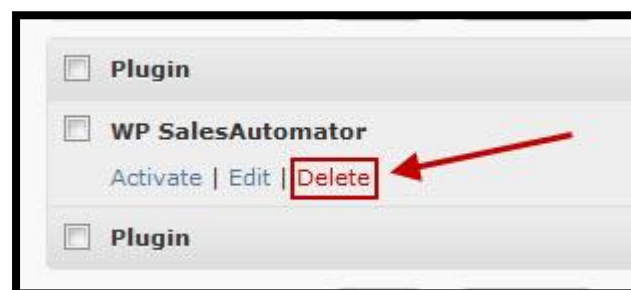
First go to the plugin settings page and make sure you have the following option checked under the '**Other Configuration**' section:



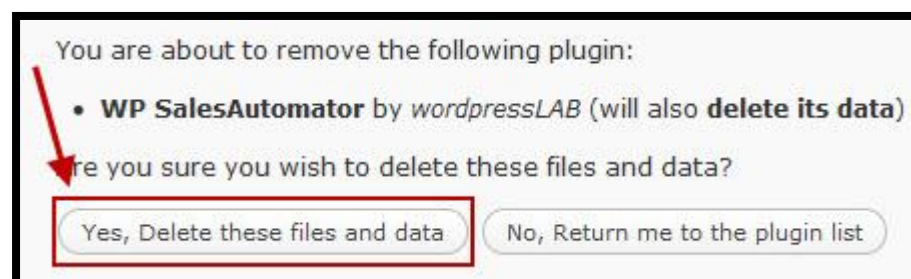
This makes sure none of your plugin database tables are deleted. Important on a live blog. So check the box and click the update options button.

Once you've done that...

Go to the plugins page and deactivate the current version. And then go to the 'recently active' page:

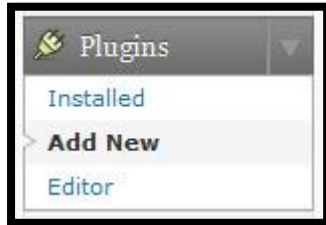


Click the delete link and then confirm:

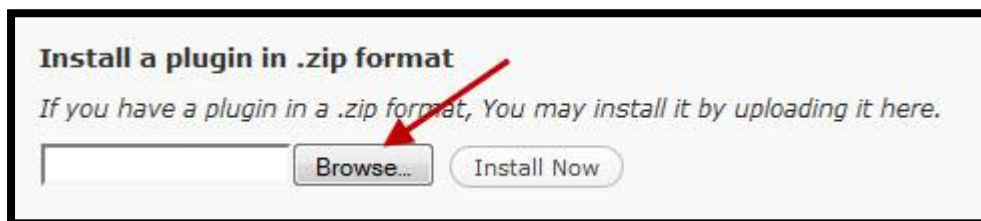


Upload New Version

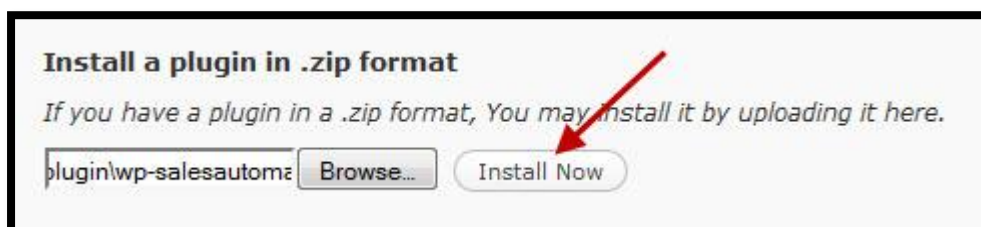
Upload the new version using the wordpress built-in upload function...



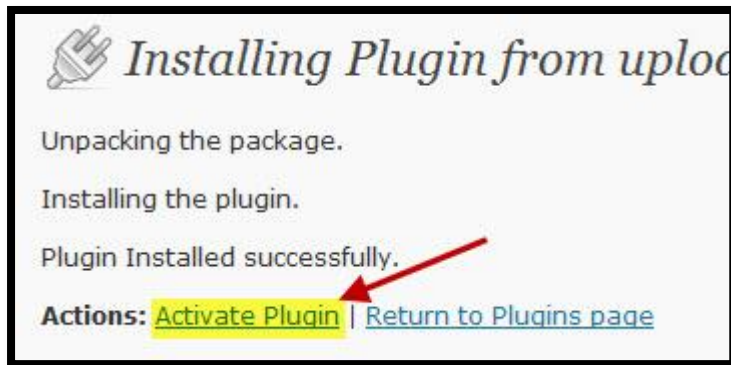
Now instead of extracting the zip file to your computer, you simply click the browse button and select the zip file on your computer and wordpress will upload and extract the plugin folder automatically.



Once the zip file is selected, click the install now button.



If the upload is successful, you can now activate like so:



The upgrade is complete ☺

You should also make your own database backup, if you are running a live blog. Just to be sure if any problems arise you can revert back.

Need a plugin to make backups?

<http://wordpress.org/extend/plugins/wp-db-backup/>

Or search in your dashboard: **WP-DB-Backup**

Final words...

Please check the forum for questions you may have, as they might have already been answered.

Or you can contact at: