

WhopSync: Complete Personal Setup & Monetization Manual

Smart Discord & Client Automation — Powered by Whop

Creator/Owner: Austin Russell

Version: 2025-10-14

1. Introduction

This manual provides a complete, step-by-step procedure to set up the WhopSync application, configure required accounts, deploy the system, connect Discord and CRM integrations, publish a product listing on Whop, and begin monetizing. It is written for first-time users who have no prior experience with Whop, Discord bots, or deployment platforms.

WhopSync automates access management and client logging for creators who sell via Whop. When a customer purchases your product on Whop, WhopSync receives a secure webhook, assigns or removes the correct Discord role for the buyer, and optionally logs the event to Notion and/or Google Sheets. The objective is to eliminate manual onboarding and give you a scalable, low-maintenance system.

Process Flow (High-Level): 1) Customer purchases on Whop. 2) Whop sends a signed webhook to your API endpoint. 3) The WhopSync worker processes the event. 4) The buyer's Discord role is granted or removed automatically. 5) The event is logged to Notion and/or Google Sheets (optional).

2. Accounts Required (Plain English)

- **Whop:** Create a seller account to list and sell your product. You will configure a webhook to notify WhopSync when purchases occur.
- **Discord:** Create or use an existing server. A bot with Manage Roles permission is invited to automate role assignments.
- **Vercel:** Hosts the WhopSync web dashboard (frontend).
- **Render:** Hosts the API and background worker processes (backend and queue consumers).
- **Neon (Postgres):** Provides a managed Postgres database for WhopSync settings, logs, and entitlements.
- **Upstash (Redis):** Provides a managed Redis instance used for the job queue and rate limiting.
- **Notion (optional):** Stores a structured log of purchases and cancellations in a Notion database.
- **Google Sheets (optional):** Appends a row for each purchase/cancellation to a spreadsheet tab you control.

3. Preparation Checklist

- Create free accounts for Whop, Discord, Vercel, Render, Neon, and Upstash.
- Optional: Create or sign in to Notion and Google accounts for CRM logging.
- Have access to a Discord server where you can invite a bot with Manage Roles.
- Download all required WhopSync files from the links in this manual.
- Allocate 60–90 minutes for initial setup and testing.

4. Deployment Overview (Click-by-Click)

Deployment Overview (You will copy/paste values; no coding required):

- 1) Database & Queue
 - Neon: create a Postgres database and copy the connection string (`DATABASE_URL`).
 - Upstash: create a Redis database and copy the connection URL (`REDIS_URL`).
- 2) Web Dashboard (Vercel)
 - Import the 'apps/web' project from the WhopSync repository.
 - Set `NEXT_PUBLIC_API_BASE` to your Render API URL after you deploy the API.
- 3) API and Worker (Render)
 - Deploy.
 - Create a Web Service using 'apps/api' with Node 20. Set environment variables.
 - Create a Background Worker using 'apps/worker' with the same environment variables.
 - Confirm the API health endpoint (`/v1/health`) returns `{ ok: true }`.
- 4) Discord
 - Create a Discord application and bot; invite it to your server with Manage Roles.
 - Set `DISCORD_BOT_TOKEN` on API and Worker.
 - In the dashboard, map your Whop Product ID to the desired Discord role.
- 5) Whop Webhook
 - In Whop: Settings → Webhooks → add your API URL `/v1/webhooks/whop`.
 - Copy the Signing Secret to `WHOP_WEBHOOK_SECRET` on Render.
 - Send a test event and confirm it appears in Logs.

5. Environment Variables (Copy/Paste)

- **`DATABASE_URL`**: Your Neon Postgres connection string.
- **`REDIS_URL`**: Your Upstash Redis connection URL.
- **`JWT_SECRET`**: A long, random secret (32+ characters).
- **`WHOP_WEBHOOK_SECRET`**: The Whop webhook signing secret from Whop settings.
- **`DISCORD_CLIENT_ID` / `DISCORD_CLIENT_SECRET`**: Discord OAuth app credentials (used for identity flows).
- **`DISCORD_BOT_TOKEN`**: Bot token with Manage Roles permission for your server.
- **`NOTION_CLIENT_SECRET` / `NOTION_DB_ID`**: If using Notion logging; integration token and database ID.
- **`GOOGLE_SERVICE_ACCOUNT_B64`**: Base64-encoded Google service account JSON (if using Sheets logging).
- **`SHEETS_SPREADSHEET_ID` / `SHEETS_WORKSHEET_NAME`**: Google Sheets target ID and tab name for logging.

6. Testing & Verification

Testing Procedure: 1) Role Mapping: In the web dashboard, select your Discord server and role. Enter your Whop Product ID and click “Save Mapping.” 2) Webhook Test: In Whop, use the “Send test event” utility or make a low-priced test product purchase. 3) Verify Discord: Confirm the buyer receives the correct role immediately. 4) Verify CRM: If enabled, confirm a new row appears in Notion and/or Google Sheets. 5) Activity Logs: Open the dashboard logs and verify that the event shows a 'success' outcome.

7. Whop Listing & Publication

Whop Listing Preparation: 1) Use the provided banner and screenshots to create a professional listing. 2) Paste the product description and pricing tiers from the Owner Pack. 3) Enable a free trial if desired to improve conversions. 4) Submit the listing for review and publish when approved.

8. Monetization & Growth Strategy

Monetization & Growth Strategy: • Pricing Tiers: Starter (\$15/month), Growth (\$39/month), Pro (\$99/month) with recommended limits and features. • Positioning: Emphasize time saved and error reduction for creators. Highlight 'no-code setup' and instant role assignments. • Early Customers: Reach out to Discord community admins, small coaching groups, and creators selling memberships on Whop. • Reviews & Testimonials: Encourage early users to leave reviews on Whop to improve marketplace ranking. • Content: Share short demos (60–120 seconds) showing purchase → auto-role assignment → CRM logging. • Upsells: Offer done-for-you onboarding services or custom integrations at a one-time fee.

9. Troubleshooting (Common Issues)

- **Webhook Signature Error:** Ensure WHOP_WEBHOOK_SECRET matches the value shown in Whop settings and that your API URL is correct.
- **Discord Role Not Assigned:** Confirm the bot has Manage Roles and that the target role is below the bot's role in the server hierarchy.
- **No CRM Rows Appearing:** Verify CRM is enabled in /crm settings, the IDs are correct, and you shared the Sheet with the service account (Editor).
- **API Unreachable:** Confirm Render services are deployed and not paused; check the /v1/health endpoint.
- **Rate Limits/Delays:** The worker uses retries and a queue; check logs for backoff and re-run failed jobs if needed.

10. Permanent Downloads & Assets

Permanent Downloads & Assets: All project bundles and assets referenced in this manual are available to download from your chat with ChatGPT. The following files are included in the WhopSync_Full_Bundle.zip archive attached in the same session: • WhopSync Owner Pack • Marketing Assets (banner + screenshots) • Sheets Starter CSV • WhopSync App — Discord-Ready • WhopSync App — CRM-Ready • WhopSync App — CRM-Settings-Ready • This Manual (DOCX + PDF) If you need to re-download any individual item, return to this conversation and use the provided links.